

## Reversing and Adjusting Claims

Sometimes an error(s) may have been made when submitting a claim. A claim was submitted for a wrong client; a claim was submitted with the wrong contract number; a claim was submitted for the wrong service; or a claim was submitted with the wrong number of service units. To correct these claims, you will have to create a reverse claim (to zero out the original claim) and an adjust claim to modify the original claim.

To Reverse or Adjust a claim, you must first find the claim on the Claim Item List. To find the client, use the Claim Item Search with, at a minimum the following search filters.

1. Enter the client’s name,
2. Set the Item Status to ‘Batched’,
3. Set the Adjud Status to ‘Adjudicated’. ONLY Adjudicated claims can be reversed or adjusted;
4. Click to the Go button.

**Claim Item Search**

Plan <input type="text"/>	Group Enrollment <input type="text"/>	ENC ID <input type="text"/>	
Client First Name <input type="text"/>	Client Last Name <input type="text"/>	Charge <input type="text"/>	
Subscriber/Resp Party First Name <input type="text"/>	S/R Party Last Name <input type="text"/>	Service <input type="text"/>	
Subscriber/Resp Party Account # <input type="text"/>	Rendering Staff <input type="text"/>	Service Date <input type="text"/>	
Authorization # <input type="text"/>	Contract Name <input type="text"/>	Contract No <input type="text"/>	
Item Status <input type="text" value="Batched"/>	Facility <input type="text" value="ATR-Assessor 1"/>		
Adjud Status <input type="text" value="Adjudicated"/>	FFS Type <input type="text" value="Fee for Service"/>		
Add-On Level <input type="text"/>			

Create Batches
Clear
Go

**Claim Item List** (Export)

Update Status

Item #	<input type="checkbox"/>	Client Name	Payer	FFS Type	Add-On Level	Service Date	Service	Billing Unit	Status	Charge	Adjud Status	Actions
523	<input type="checkbox"/>	Doolittle, Jane	ATR Assessor 1X - 159263	FFS	None	11/7/2013	2010/01	1.00	Batched	\$180.00	Adjudicated	<a href="#">Profile</a>
522	<input type="checkbox"/>	Doolittle, Jane	ATR Assessor 1X - 159263	FFS	None	11/7/2013	3050-01	1.00	Batched	\$66.00	Adjudicated	<a href="#">Profile</a>
525	<input type="checkbox"/>	Salazar, Leti	ATR Assessor 1X - 159263	FFS	None	11/8/2013	2010/01	1.00	Batched	\$180.00	Adjudicated	<a href="#">Profile</a>
526	<input type="checkbox"/>	Salazar, Leti	ATR Assessor 1X - 159263	FFS	None	11/8/2013	3050-01	1.00	Batched	\$66.00	Adjudicated	<a href="#">Profile</a>

Total Charges:	\$492.00
Total Billing Units:	4.00
Total Items:	4

Set Item Status to Batched

Set Adjud Status to Adjudicated

Click Profile to Reverse or Adjust Adjudicated Claim

The Claim Item List will contain a list of the adjudicated claims for the client. Find the claim that you want to reverse/adjust and click the Profile link

## Creating a Reverse Claim

A Reverse Claim is a claim that will zero out an original claim by setting the Billing Units to the Negative of the original claim's Billing Units.

To create a Reverse Claim, click on the [Reverse](#) link in the Administrative Actions of the Claim Profile (see below).

**Profile for Claim Item #522 for Doolittle, Jane**

ENC ID: 1170	Delivered Service: 3050-01	FFS Type Fee for Service
Program: ATR 3	Service Start: 11/7/2013 12:00 AM	
Diagnoses: / /	Service End: 11/7/2013 12:00 AM	
Status: Batched	Duration:	
	# Sessions/Units: 1	
	Rendering Staff: Afsharzadeh, Yoseb	

  

**Service Fee**

Billing Units <input type="text" value="1.00"/> X Rate / Unit <input type="text" value="\$66.00"/> = <input type="text" value="\$66.00"/>	Cost Center <input type="text"/>
Group Enrollment <input type="text" value="ATR 3 [ATR 3 Grant, 159263]"/>	Billing Note <input type="text"/>
Tier Type <input type="text" value="Fee for Service"/>	Encounter Post Date <input type="text" value="11/7/2013"/>
Created Date <input type="text" value="11/7/2013 4:11 PM"/>	

  

Payor Billing Service <input type="text" value="Transportation: 01-Bus Pass: 3050-01"/>
Service Location <input type="text" value="Office"/>
Unit Desc <input type="text" value="1 unit ="/>
Authorization <input type="text" value="211-3050-01"/> Available <input type="text" value="0.00"/>
Available to pay this claim item: <input type="text" value="0.0000"/>

  

**Administrative Actions**

<a href="#">Reverse</a>	<a href="#">Adjust</a>
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Claim # <input type="text" value="326"/>	Claim Batch # <input type="text" value="174"/>	Claim Batch Created Date <input type="text" value="11/8/2013 11:16 AM"/>
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Click on the Reverse link

An acknowledgement screen will be displayed. Click the 'Yes' button to continue or 'No' button to terminate the creation of a Reverse Claim.

Are you sure that you want to reverse this claim item?

Click 'Yes' to create the reversal transaction

The Reverse Claim will be displayed. Click Finish.

**Profile for Claim Item #538 for Doolittle, Jane**

ENC ID: 1170      Delivered Service: 3050-01      FFS Type: Fee for Service

Program: ATR 3      Service Start: 11/7/2013 12:00 AM      Service End: 11/7/2013 12:00 AM

Diagnoses: / /      Duration:      # Sessions/Units: 1

Status: Awaiting Review      Rendering Staff: Afsharzadeh, Yoseb

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**Service Fee**

Billing Units:  X Rate / Unit: \$66.00 =

Group Enrollment: ATR 3 [ATR 3 Grant, 159263]      Encounter Post Date: 11/7/2013

Tier Type: Fee for Service      Created Date: 11/21/2013 6:46 PM

Payor Billing Service: Transportation: 01-Bus Pass: 3050-01

Service Location: Office

Unit Desc: 1 unit =

Authorization: 211-3050-01      Available: 0.00

Available to pay this claim item: \$66.0000

**Administrative Actions**

[Awaiting Review-Possible Duplicate](#)   [Awaiting Review-Insufficient Funds](#)   [Hold](#)   [Release](#)   [Delete](#)

**Finish**

Click Finish. DO NOT CHANGE THE BILLING UNITS.

The Reverse Claim is an 'Awaiting Review' status and will have to be released, batched, and submitted (billed) just like other claims. The Reverse Claim amount will be subtracted from your next payment.

**Claim Item Search**

Plan:       Group Enrollment:       ENC ID:

Client First Name:       Client Last Name:       Charge:

Subscriber/Resp Party First Name:       S/R Party Last Name:       Service:

Subscriber/Resp Party Account #:       Rendering Staff:       Service Date:

Authorization #:       Contract Name:       Contract No:

Item Status: All Awaiting Review      Facility: ATR-Assessor 1

Adjud Status:       FFS Type:

Add-On Level:

[Create Batches](#)           

**Claim Item List (Export)**     

Item #	Client Name	Payor	FFS Type	Add-On Level	Service Date	Service	Billing Unit	Status	Charge	Adjud Status	Actions
538	Doolittle, Jane	ATR Assessor 1X - 159263	FFS	None	11/7/2013	3050-01	-1.00	Awaiting Review	-\$66.00		<a href="#">Profile</a>   <a href="#">Delete</a>
537	Doolittle, Jane	ATR Assessor 1X - 159263	FFS	None	11/20/2013	3050-01	1.00	Awaiting Review	\$66.00		<a href="#">Profile</a>   <a href="#">Reject</a>

Reversal Claim

Total Charges: \$0.00  
 Total Billing Units: 0.00  
 Total Items: 2

Once a claim has been Reversed or Adjusted, there will be no links in the Administrative Actions of the original claim.

Profile for Claim Item #522 for Doolittle, Jane		
ENC ID: 1170	Delivered Service: 3050-01	FFS Type Fee for Service
Program: ATR 3	Service Start: 11/7/2013 12:00 AM	
Diagnoses: / /	Service End: 11/7/2013 12:00 AM	
	Duration:	
Status: Batched	# Sessions/Units: 1	
	Rendering Staff: Afsharzadeh, Yoseb	
<b>Service Fee</b>		
Billing Units	1.00 X Rate / Unit	\$66.00 = \$66.00
Group Enrollment	ATR 3 [ATR 3 Grant, 159263]	Encounter Post Date 11/7/2013
	Tier Type Fee for Service	Created Date 11/7/2013 4:11 PM
Payor Billing Service	Transportation: 01-Bus Pass: 3050-01	
Service Location	Office	
Unit Desc	1 unit =	
Authorization	211-3050-01	Available 66.00
Available to pay this claim item:	66.0000	
<b>Administrative Actions</b>		
Claim #	326	Claim Batch # 174
		Claim Batch Created Date 11/8/2013 11:16 AM
<a href="#">Finish</a>		

**NOTE: Once a Reverse or Adjust claim is created, the Administrative Actions are no longer applicable**

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## Creating an Adjust Claim

An Adjust Claim is a claim that will allow you to modify the Billing Units, the Group Enrollment, or Payor Billing Service. In ATR the only adjustment that can be made to an adjudicated in the Billing Units.

To create an Adjust Claim, click on the [Adjust](#) link in the Administrative Actions of the Claim Profile (see below). The Adjust link will create two (2) claims – a Reverse Claim and the Adjust Claim.

**Profile for Claim Item #523 for Doolittle, Jane**

ENC ID: 1169	Delivered Service: 2010/01	FFS Type: Fee for Service
Program: ATR 3	Service Start: 11/7/2013 12:00 AM	
Diagnoses: 276.9 / /	Service End: 11/7/2013 12:00 AM	
Status: Batched	Duration:	
	# Sessions/Units: 1	
	Rendering Staff: Afsharzadeh, Yoseb	

**Service Fee**

Billing Units: 1.00 X Rate / Unit: \$180.00 = \$180.00

Group Enrollment: ATR 3 [ATR 3 Grant, 159263]      Encounter Post Date: 11/7/2013

Payor Billing Service: ATR - Assessment: 2010/01      Tier Type: Fee for Service      Created Date: 11/8/2013 11:16 AM

Service Location: Office

Unit Desc: 1 unit =

Authorization: 211-2010      Available: 0.00

Available to pay this claim item: 0.0000

**Administrative Actions**

[Reverse](#)   [Adjust](#)

Claim # 325      Claim Batch # 174      Claim Batch Created Date 11/8/2013 11:16 AM

**Finish**

An acknowledgement screen will be displayed. Click the 'Yes' button to continue or 'No' button to terminate the creation of an Adjust Claim and the Reverse Claim.

**Are you sure that you want to adjust this claim item?**

 

**Click 'Yes' to continue**

When click 'Yes', the Reverse Claim will automatically be created with an 'Awaiting Review' status and will have to 'Released', 'Batched', and Billed like any other claim.

The Adjust Claim will be displayed. For ATR, the only field that can be modified is the Billing Units field. NOTE: An original claim can also be adjusted by clicking on the Profile link in the Claim Item List, then clicking on the Adjust link of the Claim Profile. This function is used when updating the Billing Units for Gap Services. (see Adjusting an Original Claim)

**Profile for Claim Item #543 for Doolittle, Jane**

ENC ID: 1169	Delivered Service: 2010/01	FFS Type: Fee for Service
Program: ATR 3	Service Start: 11/7/2013 12:00 AM	
Diagnoses: 276.9 / /	Service End: 11/7/2013 12:00 AM	
Status: Awaiting Review	Duration:	
	# Sessions/Units: 1	
	Rendering Staff: Afsharzadeh, Yoseb	

  

Service Fee Billing Units: <input type="text" value="1.00"/> X Rate / Unit: \$180.00 = \$180.00		Cost Center: <input type="text"/>
Group Enrollment: ATR 3 [ATR Grant, 159263]		Billing Note: <input type="text"/>
Payor Billing Service: ATR - Assessment: 2010/01		Encounter Post Date: 11/7/2013
Service Location: <input type="text" value="Office"/>		Created Date: 11/21/2013 7:26 PM
Unit Desc: 1 unit =		
Authorization: 211-2010	Available: 0.00	
Available to pay this claim item: 0.0000		

  

**Administrative Actions**

[Awaiting Review-Possible Duplicate](#)
[Awaiting Review-Insufficient Funds](#)
[Hold](#)
[Release](#)
[Delete](#)

In ATR you can only modify the Units field

Click to the Cancel or Finish button to complete creating the Adjust Claim. The Adjust Claim will be saved with an 'Awaiting Review' status and will have to be 'Released', 'Batched' and Billed, just like any other claim. The Save button will only save your changes.

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