

## Tracking Agency Spending

In this training Agency Billing Staff will learn how to download the Claim Batch List and create an Excel document to track Agency spending.

**Note:** The Claim Batch List displays multiple claims submitted as a batch. The Claim Item List displays individual claims.

1. To track Released Batches, click on **Agency, Billing**, and then **Claim Batch List** in the left menu pick.
  - a. Select **Released** in the Status field.
  - b. Click **Search**.
  - c. Click **Export** to download the Claim Batch List spreadsheet.

The screenshot shows the WITS HI-WITS Training interface. The left sidebar contains a navigation menu with items like Agency, Billing, and Claim Batch List. The main content area is divided into two sections: 'Provider Claim Batch List' and 'Claim Batch List'. The 'Provider Claim Batch List' section has search filters for Plan Name, Billing Form, Batch #, FFS Type, Created Date, Transmit Date, and Status. The 'Claim Batch List' section shows a table of claim batches with columns for Batch #, Status, Batch For, FFS Type, Billing Form, 837 Type, Order, Charges, Units, Created, Transmit, Agency Name, and Facility Name. Red callouts with numbers 1-6 point to specific actions: 1. Click Agency (pointing to the Agency menu item), 2. Click Billing (pointing to the Billing menu item), 3. Click Claim Batch/Item List (pointing to the Claim Batch List menu item), 4. Select Released (pointing to the Status dropdown menu), 5. Click Search (pointing to the Search button), and 6. Click Export (pointing to the Export button).

Batch #	Status	Batch For	FFS Type	Billing Form	837 Type	Order	Charges	Units	Created	Transmit	Agency Name	Facility Name
22	Voided	Test RES-IOP-OP (TST 08-001)	FFS	WITS Batch		P	\$2,325.00		8/25/2008		TEST PROVIDER	
25	Voided	Test RES-IOP-OP (TST 08-001)	FFS	WITS Batch		P	\$4,950.00		8/26/2008		TEST PROVIDER	
27	Accepted	Test RES-IOP-OP (TST 08-001)	FFS	WITS Batch		P	\$560.00		8/27/2008	8/27/2008	TEST PROVIDER	

2. Open the Excel document for details of the Claim Batch List.

Batch #	Status	H837 Status	Batch For	FFS Type	Billing For	837 Type	Order	Charges	Units	Created	Transmit	Agency Na	Facility Name
242	Released		Test Provider Adult, Dual and ICM (ADAD 14-555)	FFS	WITS Batch	P		(\$12.00)		5/10/2016	5/10/2016	TEST PROVIDER	
256	Released		Test Provider Adult, Dual and ICM (ADAD 14-555)	FFS	WITS Batch	P		\$419.00		10/27/2016	10/27/2016	TEST PROVIDER	
286	Released		ADAD 18-XXX Test Provider (Click Profile ADAD 18-XXX)	FFS	WITS Batch	P		\$1,315.00		7/25/2018		TEST PROVIDER	
1311	Released		Test Provider 20-XXX (ADAD 20-XXX)	FFS	WITS Batch	P		\$326.25	10	9/13/2021		TEST PROVIDER	
2317	Released		Test Provider Adult, Dual and ICM (ADAD 14-555)	FFS	WITS Batch	P		(\$75.00)	-4	9/19/2023		TEST PROVIDER	
2319	Released		ADAD 18-XXX Test Provider (Click Profile ADAD 18-XXX)	FFS	WITS Batch	P		\$271.00	37	10/16/2023		TEST PROVIDER	
2320	Released		Test Provider 20-XXX (ADAD 20-XXX)	FFS	WITS Batch	P		\$1,151.00	28	10/16/2023		TEST PROVIDER	
2321	Released		Test Provider 22-XXX (ADAD 22-XXX)	FFS	WITS Batch	P		\$250.00	10	10/16/2023		TEST PROVIDER	
2322	Released		Test Provider 20-XXX (ADAD 20-XXX)	FFS	WITS Batch	P		(\$29.00)	-4	10/16/2023		TEST PROVIDER	
2325	Released		ADAD 18-XXX Test Provider (Click Profile ADAD 18-XXX)	FFS	WITS Batch	P		\$266.00	19	5/17/2024		TEST PROVIDER	
2326	Released		Test Provider 20-XXX (ADAD 20-XXX)	FFS	WITS Batch	P		\$7.00	1	5/28/2024		TEST PROVIDER	
Total								\$3,889.25					

**Note:** If selecting Claim Item List from the left menu pick, follow the above steps. The total Claim charges are automatically calculated at the bottom of the Claim Item List.

Item #	Client Name	Payor	FFS Type	Add-On Level	Service Date	Service	Billing Unit	Status	Charge	Adjud Status
229	Farve, Brett	Test RES-IOP-OP - TST 08-001	FFS	None	6/12/2008	H0002	-6.00	Released	-\$112.50	
230	Farve, Brett	Test RES-IOP-OP - TST 08-001	FFS	None	6/12/2008	H0002	6.00	Released	\$112.50	
285	Farve, Brett	Test RES-IOP-OP - TST 08-001	FFS	Primary	9/1/2008	H0001	4.00	Released	\$75.00	
2833	Farve, Brett	Test Provider Adult, Dual and ICM - ADAD 14-555	FFS	Primary	6/18/2015	H0005	-4.00	Released	-\$48.00	
219	Henderson, Kalani	Test RES-IOP-OP - TST 08-001	FFS	Primary	4/2/2008	H0004	-6.00	Released	-\$112.50	
220	Henderson, Kalani	Test RES-IOP-OP - TST 08-001	FFS	None	1/2/2008	H0015	-12.00	Released	-\$105.00	
221	Henderson, Kalani	Test RES-IOP-OP - TST 08-001	FFS	None	1/2/2008	H0015	10.00	Released	\$87.50	
226	Henderson, Kalani	Test RES-IOP-OP - TST 08-001	FFS	Primary	4/1/2008	H0005	-7.00	Released	-\$84.00	

**Totals**

Charges: \$16,557.25

Billing Units: 97.00

Items: 51

- 3. To view each claim item in a specific batch, hover over the three dots and select Claim Items.

Claim Batch List

Download 837 Export

Batch #	Status	Batch For	FFS Type	Billing Form	837 Type	Transmit	Agency Name	Facility Name
242	Released	Test Provider Adult, Dual and ICM (ADAD 14-555)	FFS	WITS Batch	P	5/10/2016	5/10/2016	TEST PROVIDER
256	Released	Test Provider Adult, Dual and ICM (ADAD 14-555)	FFS	WITS Batch	P	10/27/2016	10/27/2016	TEST PROVIDER
286	Released	ADAD 18-XXX Test Provider (Click ProfileADAD 18-XXX)	FFS	WITS Batch	P	7/25/2018		TEST PROVIDER
1311	Released	Test Provider 20-XXX	FFS	WITS	P	8/26/2021	10/01/2021	TEST PROVIDER

- a. Find the Claim Items in the Claim Item List on the bottom of the screen.

Claim Item List for Batch 242

Export Remove From Claim Batch

Claim #	Item #	Client Name	Service Date	Service	Auth #	Svc Date	Charge	Enc ID
529	2781	Columbus, Christopher	11/17/2014	H0047/CI		11/17/2014	-\$24.00	2316
530	2782	Columbus, Christopher	11/17/2014	H0047/CI		11/17/2014	\$12.00	2316

If you have any question, please email [DOH.ADAD.WITSHelp@doh.hawaii.gov](mailto:DOH.ADAD.WITSHelp@doh.hawaii.gov).