

Review claims

Last Modified on 01/11/2023 3:41 pm AEDT

The introduction of Medicare Web Services means you no longer need to batch invoices in Zedmed. Claims are automatically sent one at a time and invoices are still paid in bulk by Medicare. These Claims are now managed in the **Claims Status** screen's Claims tab and Payments tab.

Overview

The Claims tab makes it easy to review submitted claims, including those that have been received and responded to by Medicare and those that were not accepted by Medicare. Key to using this tab is understanding all of the headings and status types, which are explained in the sections below.

Common uses for the Claims tab:

- Investigate rejected items, overpayments and underpayments so you can complete a reconciliation.
- Review and void rejected claims for full invoices.
- Reinvoice invalid claims.

To open the Claims tab:

1. Go to Zedmed's **Management** tab.
2. Select **Claims**, and the **Claims Status** screen will open on the **Claims** tab.

Claims Status (top) menu options:

- **Refresh** - updates the listed invoices after selecting a filter, for example, a date range or doctor.
- **Default View** - resets the view to all New (not receipted) invoices.
- **Expand / Collapse All** - expands or collapses all listed invoices.
- **Void Rejected Claims** - voids the selected invoice. You can then create a new invoice with the required changes.
- **Transmit Claims** - is used to transmit any held (suppressed) Medicare, DVA, bulk bill and fund invoices.

Claim Status Detail report

To help staff communicate key information, Zedmed v35.3.3 adds **Print Report** and **Show Report** buttons to the **Claims** tab so you can view or print the information displayed on the screen. To adjust what is included, use the options in the **Filtering** section below, select **Refresh** then open the report.

Claim Status

Refresh

Default View

Expand All

Collapse All

Void Rejected Invoices

Transmit Claims

Claims

Payments

From

1/04/2022

All Submitted Claim Types

Branch

<ALL>

Doctor

<ALL>

Claim ID

Payment ID

To

1/08/2022

Not Submitted

Status

<ALL>

Patient

All

Find Patient

Clear

Invoice No.

Inv/Service/Assessor	Date	Status	Patient	Outstanding	Paid	Doctor	Claim ID	Medicare Ref.
<div><div></div><div>Inv 11270</div><div></div></div>	5/04/2022	COMPLETE	Bates, Bridgid	\$0.00	\$39.10	Augustus Eason	198127	SAP0000005042022102115
<div><div></div><div>23</div><div></div></div>		Reconciled		\$0.00	\$39.10			
<div><div></div><div>Medicare</div><div></div></div>		ASSESSED						
<div><div></div><div>Inv 11271</div><div></div></div>	5/04/2022	COMPLETE	Simkins, Talia	\$0.00	\$39.10	Igor Fuller	198134	A0011@
<div><div></div><div>23</div><div></div></div>		Reconciled		\$0.00	\$39.10			
<div><div></div><div>Inv 11273</div><div></div></div>	5/04/2022	COMPLETE	Markell, Dylan	\$0.00	\$39.10	Igor Fuller	198165	A0040@
<div><div></div><div>23</div><div></div></div>		Reconciled		\$0.00	\$39.10			
<div><div></div><div>Inv 11276</div><div></div></div>	5/04/2022	WITH MEDICARE	Simkins, Talia	\$36.30	\$0.00	Igor Fuller	198167	A0041@
<div><div></div><div>23</div><div></div></div>		Unpaid		\$36.30	\$0.00			
<div><div></div><div>Inv 11278</div><div></div></div>	5/04/2022	COMPLETE	Heaney, Titus	\$0.00	\$39.10	Igor Fuller	198192	A0062@
<div><div></div><div>10991</div><div></div></div>		Unpaid		\$0.00	\$0.00			
<div><div></div><div>23</div><div></div></div>		Reconciled		\$0.00	\$39.10			
<div><div></div><div>Inv 11295</div><div></div></div>	12/07/2022	COMPLETE	Simkins, Talia	\$36.30	\$39.75	Igor Fuller	202739	A0001@
<div><div></div><div>23</div><div></div></div>		Overpaid		\$36.30	\$39.75			
<div><div></div><div>Inv 11297</div><div></div></div>	14/07/2022	MEDICARE_PENDEED	Post, Jamee	\$71.30	\$0.00	Igor Fuller	202795	SAP0000014072022150755
<div><div></div><div>23</div><div></div></div>		Unpaid		\$71.30	\$0.00			

Print Report

Show Report

Close

2. Expand the invoice and review the item. The reason for the rejection will be displayed next to the **Status**.
3. You can double-click an invoice or the patient to open the **Patient Details** screen for easy access to **Acct Enquiry** and **Billing**.

To void a rejected item:

1. Go to the **Payments** tab and select the payment with the rejected invoice items.
2. Select **Reconcile Payments**.
3. Select **Void Rejected Services** on the Payment Reconcile Options dialog.
4. Select **OK**.

Void Rejected Services is not selected by default as rejected items may indicate that an update is required for an item/service.

The screenshot shows the 'Claim Status' window with the 'Payments' tab selected. A list of payments is displayed with columns: Payment ID, Payment Date, Status, Payer / Branch, Run Number / Doctor, Paid, Outstanding, BSB, Acc. No. / Patient, Account Name, Remittance ID, and Trans. ID. A 'Payment Reconciliation Options' dialog box is open, showing options for 'Allow Overpayment', 'Adjust Underpayment', 'Ignore Underpayment', and 'Void Rejected Services'. The 'Void Rejected Services' option is highlighted. A red callout bubble points to the 'Zedmed v35.3 and later' text.

Payment ID	Payment Date	Status	Payer / Branch	Run Number / Doctor	Paid	Outstanding	BSB	Acc. No. / Patient	Account Name	Remittance ID	Trans. ID
20624	17/03/2022	New	Department of Veterans ...	501	\$409.60	\$409.60	062290	*****6789	DR FULLER		DVA-2
20625	17/03/2022	New	Department of Veterans ...	501	\$80.30	\$80.30	062290	*****6789	DR EASON		DVA-2
20711	23/03/2022	New	Medicare Australia	801	\$115.40	\$115.40	062290	*****6789	DR EASON		BB--2C
20742	24/03/2022	New	Medicare Australia	802	\$39.10	\$39.10	062290	*****6789	DR FULLER		BB--2C
20743	24/03/2022	New	Medicare Australia	802	\$77.20	\$77.20	062290	*****6789	DR EASON		BB--2C
20752	25/03/2022	New	Department of Veterans ...	509	\$45.00	\$40.95	062290	*****6789	DR FULLER		DVA-2
20745	25/03/2022	New	Medicare Australia	803	\$80.95	\$80.95	062290	*****6789	DR EASON		BB--2C
20769	28/03/2022	New	Department of Veterans ...	512	\$180.00	\$163.80	062290	*****6789	DR FULLER		DVA-2
Inv. 11249			MED	Igor Fuller	\$45.00	\$40.95			Chapman, William		
Inv. 11250					\$45.00	\$40.95			Irvine, Jasper		
Inv. 11253					\$45.00	\$40.95			Darice, Romeo		
Inv. 11254					\$45.00	\$40.95			Gayle, Angiolina		
20753	28/03/2022				\$39.10	\$36.30	062290	*****6789	DR EASON		BB--2C
20771	29/03/2022				\$117.30	\$108.90	062290	*****6789	DR FULLER		BB--2C
20826	30/03/2022							*****6789	DR FULLER		DVA-2
20827	30/03/2022							*****6789	DR BOYKIN		DVA-2
21152	31/03/2022				\$701.20	\$701.20	062290	*****6789	DR BOYKIN		DVA-2
21205	1/04/2022				\$619.00	\$619.00	062290	*****6789	DR FULLER		DVA-2
21214	4/04/2022				\$36.30	\$36.30	123456	12345678	Fozzie Bear		BB--2C
21216	4/04/2022				\$36.30	\$36.30	123456	12345678	Fozzie Bear		BB--2C
21217	4/04/2022				\$36.30	\$36.30	123456	12345678	Fozzie Bear		BB--2C
21224	4/04/2022				\$45.00	\$45.00	062290	*****6789	DR FULLER		DVA-2
21220	4/04/2022				\$36.30	\$36.30	123456	12345678	Fozzie Bear		BB--2C
21268	5/04/2022				\$273.70	\$273.70	062290	*****6789	DR FULLER		BB--2C
21458	10/04/2022				\$35.18	\$35.18	002913	*****6789	Dummy Healt...	TSTADV123	AAA9!
21935	10/04/2022	New	Mock Health Fund Pty Ltd	TSTADV123	\$35.18	\$35.18	002913	*****6789	Dummy Healt...	TSTADV123	AAA9!

Rejected claims for full invoices

If a full invoice is rejected, it will not appear in the **Payments** tab as there will be no payment. It will appear in the **Claims** tab, so you need to come to the Claims tab on a regular basis to review and void rejected invoices. The reason for the rejection can be seen by expanding the invoice.

To process rejected claims for full invoices:

1. Go to the **Claims** tab.
2. Select **Rejected** from the **Status** field.
3. Select **Refresh**.

All rejected invoices will appear.

4. Expand each invoice to see the reason for the rejection next to the status.

5. Take any required actions such as creating a new invoice.

For fast access to **Acct Enquiry** and **Billing**, double-click the invoice to open the Patient's details. Once you have reviewed the reason for the rejection and taken the required actions, you can void the invoice.

6. Select the invoice to be voided.

7. Select the **Void Rejected Claims** button.

8. Confirm the action.

9. Repeat these steps for each **Rejected** status. For example, **Rejected Fund**.

The invoice will disappear from the Claims tab but it will still appear in **Acct Enquiry** with the status Void.

The screenshot shows the 'Claim Status' window with the following details:

- Toolbar:** Refresh, Default View, Expand All, Collapse All, **Void Rejected Invoices** (highlighted), Transmit Claims.
- Filters:** From: 1/02/2022, To: 24/02/2022, All Submitted Claim Types, Branch: <ALL>, Doctor: <ALL>, Status: Rejected, Patient: All.
- Table:**

Inv/Service/Assessor	Date	Status	Patient	Outstanding	Paid	Doctor	Claim ID	Medicare Ref.
Inv 10824	1/02/2022	REJECTED	Giles, Elaina	\$31.60	\$0.00	Augustus Eason	194592	A0002@
65120		Unpaid		\$11.75	\$0.00			
65111		Unpaid		\$19.85	\$0.00			
Medicare 325			Laboratory not accredited for benefits for this service					
Inv 10839	1/02/2022	REJECTED	Abbott, Gabriel	\$1,135.40	\$0.00	Augustus Eason	194623	A0006@
33500		Unpaid		\$1,135.40	\$0.00			
Medicare 601			In hospital services cannot be claimed as out of hospital					
Inv 11227	24/02/2022	REJECTED	Bates, Bridgid	\$114.45	\$0.00	Augustus Eason	196159	21477%
108		Unpaid		\$114.45	\$0.00			
Medicare			Patient is eligible to claim for Medicare with details provided.					
Fund			Patient is eligible to claim with Health Fund specified in the request.					

Buttons at the bottom: Print Report, Show Report, Close.

Filtering and locating invoices

Claims Invoices for the past week are shown by default, and you can filter what is displayed to view specific payers or invoices. Select **Refresh** after changing the display options.

To find a specific invoice or invoices, enter a Patient ID, Payment ID, Claim ID or Invoice No into the fields provided and select Refresh. If you are using filters to limit what is shown, they will not filter out invoices that match the search criteria.

Claims tab display options (Refresh to update selections):

- **From & To** - are used to display invoices within a selected date range based on the invoices' creation date.
- **Claim Types** - allows you to view invoices sent to the following payers:
 - **All Submitted Claim Types** - shows invoices for all payers
 - **Bulk Bill** - Medicare invoices (Terminology change).
 - **DVA** - Department of Veterans Affairs invoices.
 - **InPatientMedical** - ECLIPSE invoices(Terminology change).
 - **Medicare** - Private patient invoices - patient is the payer. Uses MA Online or Tyro Easy Claim (Terminology change).
 - **VAA** - DVA Allied Health invoices.

- **Not submitted** - is used to show Medicare and DVA bulk bill and fund invoices that have been held (suppressed).
- **Branch** - is used to view invoices from the selected branch.
- **Status** - is used to show only invoices with the selected status, for example, Cancelled, Complete or Invalid invoices.
- **Doctor** - is used to show the invoices for a selected doctor.

Understanding the information shown

The following columns provide information for each claim:

- **Inv/Service/Assessor** - the invoice number, service and the assessor of the claim.
- **Date** - when the invoice was completed and submitted.
- **Status** - tells you if the claim has been completed and reconciled, if an invoice was rejected, if an underpayment or overpayment was received and where the invoice is in Medicare's claiming process. See details below.
- **Patient** - shows who the invoice is for and any Medicare notes, for example, why an invoice was rejected.
- **Outstanding** - shows the outstanding amount on the invoice.
- **Paid** - shows how much was received from the payer.
- **Doctors** - the doctor the invoice was raised for.

The Inv/Service/Assessor Status

The status shown in capitals is from Medicare and the status in lower case is from Zedmed. The status options provided by Medicare can change and may use similar wording for the same status. The Status will often include an explanation, for example, why an invoice was rejected.

Medicare Status options:

- **COMPLETE** - Medicare has confirmed the claim was completed. This usually indicates the claim was successful. If an invoice had a rejected item it will also appear here. To learn more, see [rejected invoice processing](#).
- **WITH MEDICARE** - The claim was submitted and is waiting to be accepted by Medicare.
- **INVALID** - The claim was not accepted into the Medicare system. This may be due to incorrect formatting or a missing mandatory field. If you try retransmitting the claim, a reason will be displayed. You can open the invalid invoice make any required changes and reinvoice.
- **MEDICARE ASSESSING** - The claim was submitted and is being assessed.
- **MEDICARE PENDABLE** - This is a real-time interactive claim (MA Online) that may be flagged for review by a person.
- **MEDICARE PENDED** - This is a real-time interactive claim (MA Online) that has been flagged for review by a person.
- **REJECTED** (incl by Medicare or fund) - The full invoice was rejected. To learn more, see [rejected invoice processing](#).

- **CANCELLED**- the practice canceled the claim after submitting it. Only cancel or void a submitted claim in rare circumstances (for example, if the claim is for the wrong patient) because you will need to manually reconcile it. Instead, wait for Medicare to reject the claim then void the invoice.
- **LOST** - this refers to situations where Medicare has not responded to a claim for 2 weeks. If the claim has been paid it can be manually receipted. If the claim has not been paid, retransmit it from Acc Enquiry.
- **Status numbers**: sometimes Medicare will show a number and text next to it instead of a capitalised status. This number is the code for the response and the text equivalent is next to it. The number does not represent a financial amount; what is important is the text.

Zedmed status options:

- **Reconciled** - the payment was receipted. The invoice and claiming process has been completed.
- **Paid** - a payment has been received for the full invoice.
- **Not paid** - the invoice was not paid. This could happen if the invoice was submitted with \$0 outstanding.
- **Underpaid** - the amount paid is less than the amount outstanding on the invoice.
- **Overpaid** - the amount paid is more than the amount outstanding on the invoice.
- **Part payment** - (ECLIPSE) when Medicare only pays part of the invoice because a health fund paid part.

Claim Status

Refresh

Default View

Expand All

Collapse All

Void Rejected Invoices

Transmit Claims

Claims

Payments

From31/01/2022

All Submitted Claim Types

Branch<ALL>

Doctor<ALL>

Claim ID

Payment ID

To2/02/2022

Not Submitted

Status<ALL>

PatientAll

Find Patient

Clear

Invoice No.

<input type="checkbox"/> Inv/Service/Assessor	Date	Status	Patient	Outstanding	Paid	Doctor	Claim ID	Medicare Ref.
<input checked="" type="checkbox"/> Inv 10816	31/01/2022	MEDICARE_PENDED	Adamson, Liam	\$71.30	\$0.00	Igor Fuller	194560	SAP0000031012022160142
<input checked="" type="checkbox"/> Inv 10815	31/01/2022	COMPLETE	Adamson, Liam	\$0.00	\$39.10	Igor Fuller	194544	A0007@
<input checked="" type="checkbox"/> Inv 10817	31/01/2022	PROCESSED	Ashley, Wyatt	\$63.30	\$36.97	Augustus Eason	194562	17701%
<input checked="" type="checkbox"/> Inv 10818	31/01/2022	COMPLETE	Gregory, Isabelle	\$0.00	\$75.75	Igor Fuller	194569	A0024@
<input checked="" type="checkbox"/> Inv 10819	31/01/2022	COMPLETE	Gayle, Angiolina	\$0.00	\$45.00	Igor Fuller	194563	D0001@
<input checked="" type="checkbox"/> Inv 10820	31/01/2022	PROCESSED	Carpenter, David	\$63.30	\$36.97	Augustus Eason	194568	17705%
<input checked="" type="checkbox"/> Inv 10821	31/01/2022	COMPLETE	Chapman, William	\$0.00	\$45.00	Igor Fuller	194570	D0002@
<input checked="" type="checkbox"/> Inv 10822	31/01/2022	WITH MEDICARE	Alston, Mia	\$27.90	\$0.00	Augustus Eason	194571	#0009@
<input type="checkbox"/> Inv 10824	1/02/2022	REJECTED	Giles, Elaina	\$31.60	\$0.00	Augustus Eason	194592	A0002@
<input type="checkbox"/> Inv 10825	1/02/2022	COMPLETE	Chapman, William	\$75.20	\$79.75	Gaye Jackson	194593	D0001@
<input type="checkbox"/> Inv 10831	1/02/2022	COMPLETE	Gregory, Isabelle	\$36.30	\$39.10	Igor Fuller	194599	A0001@
<input type="checkbox"/> Inv 10833	1/02/2022	COMPLETE	Bates, Belinda	\$76.45	\$82.30	Igor Fuller	194604	A0002@
<input checked="" type="checkbox"/> Inv 10834	1/02/2022	MEDICARE_VERIFIED	Bates, Bridgid	\$78.00	\$0.00	Augustus Eason	197941	197941
<input type="checkbox"/> Inv 10835	1/02/2022	WITH MEDICARE	Bates, Ferdinand	\$32.25	\$0.00	Augustus Eason	194605	#0004@
<input type="checkbox"/> Inv 10836	1/02/2022	COMPLETE	Bates, Gary	\$72.75	\$76.80	Augustus Eason	194606	A0005@
<input type="checkbox"/> Inv 10837	1/02/2022	WITH MEDICARE	Abbott, Gabriel	\$227.10	\$0.00	Gaye Jackson	194621	A0003@
<input type="checkbox"/> Inv 10838	1/02/2022	WITH MEDICARE	Abbott, Gabriel	\$227.10	\$0.00	Gaye Jackson	194622	A0004@
<input type="checkbox"/> Inv 10839	1/02/2022	REJECTED	Abbott, Gabriel	\$1,135.40	\$0.00	Augustus Eason	194623	A0006@
<input type="checkbox"/> Inv 10843	2/02/2022	WITH MEDICARE	Chapman, William	\$40.95	\$0.00	Igor Fuller	194682	D0009@
<input type="checkbox"/> Inv 10844	2/02/2022	COMPLETE	Simkins, Talia	\$36.30	\$39.10	Igor Fuller	194684	A0003@
<input type="checkbox"/> Inv 10845	2/02/2022	COMPLETE	Post, Jamee	\$70.30	\$75.75	Igor Fuller	194685	A0004@
<input type="checkbox"/> Inv 10846	2/02/2022	COMPLETE	Markell, Dylan	\$71.30	\$39.10	Augustus Eason	194686	SAP0000002022022145115
<input type="checkbox"/> Inv 10847	2/02/2022	INVALID	Irvine, Jasper	\$40.95	\$0.00	Igor Fuller	194687	

Print Report

Show Report

Close