

Patient Access Service Communication Bulletin

April 13, 2021

Claim Information Record

The Claim Information Record has a new look and the navigation has changed with the Epic Upgrade.

The Claim Information Record can be found using the Claim Info Button in the Interactive Face Sheet Activity Toolbar.

The screenshot shows the Epic Preadmission interface for a patient named William Badger. The 'Claim Info' button in the top navigation bar is highlighted with a red box. The interface includes a left-hand navigation pane with options like 'Encounter Info', 'Hospital Accounts', and 'Claim Info'. The main content area displays patient demographics, contact information, and PCP details.

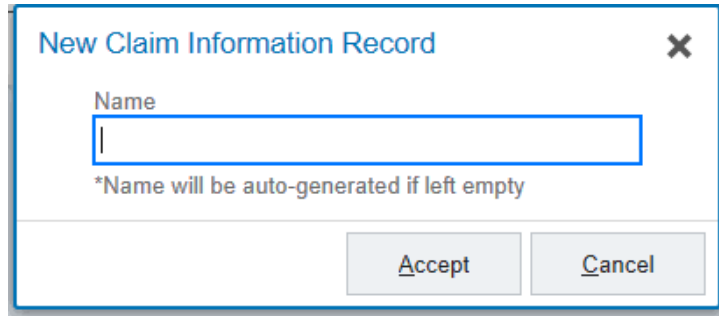
Interactive Face Sheet

- To create a new record, Click the New Claim Information Record, found in the upper right-hand corner

The screenshot shows the 'Claim Information Selector' window. In the top right corner, a button labeled 'New Claim Information Record' is highlighted with a red box. Below this, there is a table titled 'Patient's Available Records' with columns for Type, Condition Related To, Service Area, Initial Visit, Last Scheduled Visit, and Transactions. Two records are listed under 'Other Records'.

Type	Condition Related To	Service Area	Initial Visit	Last Scheduled Visit	Transactions
1/14/18 abdominal and back pain [633368]	—	UPSTATE MEDICAL UNIVERSITY	01/14/2018	01/14/2018	Associate
1/14/2017 RASH [489904]	—	UPSTATE MEDICAL UNIVERSITY	01/14/2017	01/14/2017	Associate

- The New Claim Information Record populates. Name the Claim using the proper naming convention of: Date and Body Part



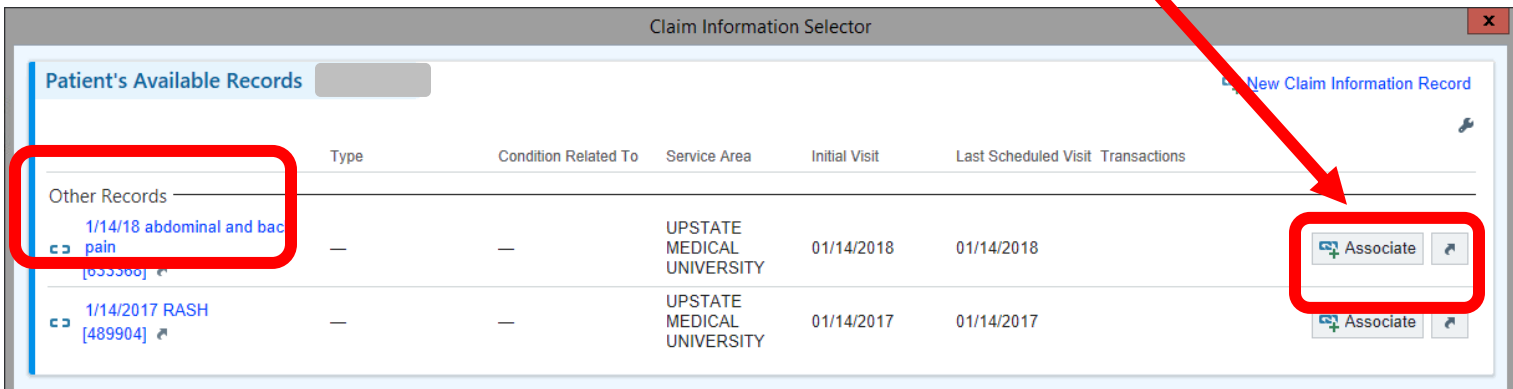
New Claim Information Record [X]

Name

*Name will be auto-generated if left empty

Accept Cancel

- All existing claim records can be found under Other Records
- To attach an existing record to the HAR click to the right on the Associate button.

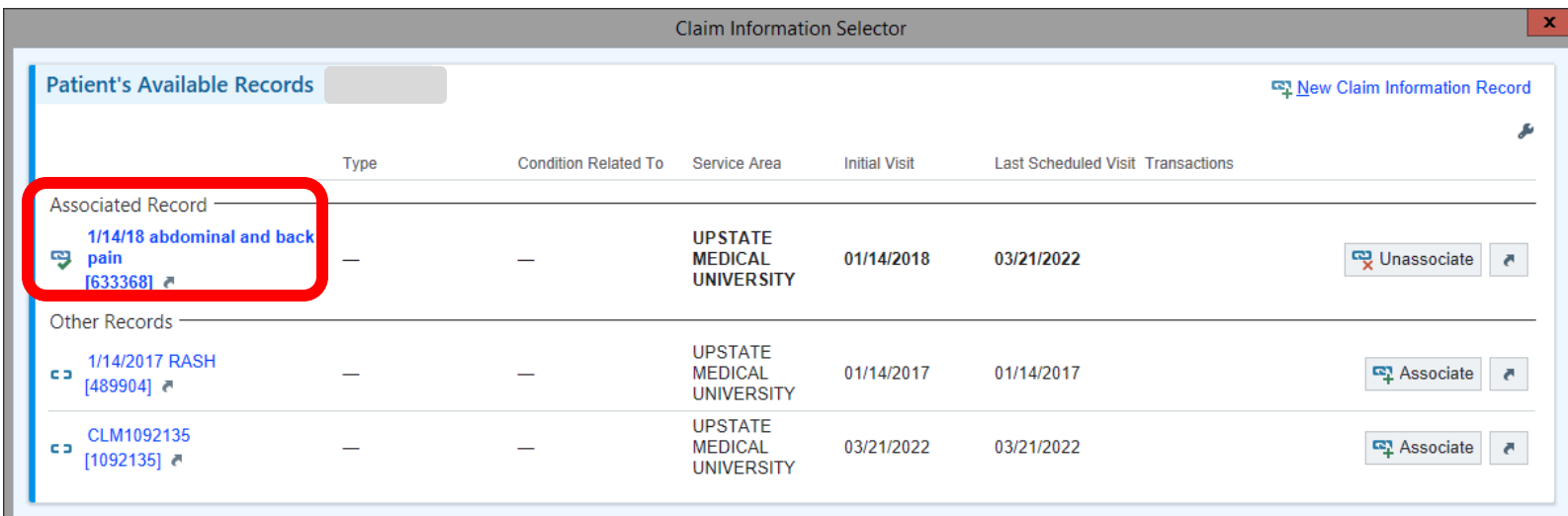


Claim Information Selector [X]

Patient's Available Records [New Claim Information Record]

Type	Condition Related To	Service Area	Initial Visit	Last Scheduled Visit	Transactions
Other Records					
1/14/18 abdominal and back pain [633368]	—	UPSTATE MEDICAL UNIVERSITY	01/14/2018	01/14/2018	Associate
1/14/2017 RASH [489904]	—	UPSTATE MEDICAL UNIVERSITY	01/14/2017	01/14/2017	Associate

- Once linked a green checkmark will then appear to the left next to the Associated Record



Claim Information Selector [X]

Patient's Available Records [New Claim Information Record]

Type	Condition Related To	Service Area	Initial Visit	Last Scheduled Visit	Transactions
Associated Record					
1/14/18 abdominal and back pain [633368]	—	UPSTATE MEDICAL UNIVERSITY	01/14/2018	03/21/2022	Unassociate
Other Records					
1/14/2017 RASH [489904]	—	UPSTATE MEDICAL UNIVERSITY	01/14/2017	01/14/2017	Associate
CLM1092135 [1092135]	—	UPSTATE MEDICAL UNIVERSITY	03/21/2022	03/21/2022	Associate