

How to Submit a Claim (Single Provider)

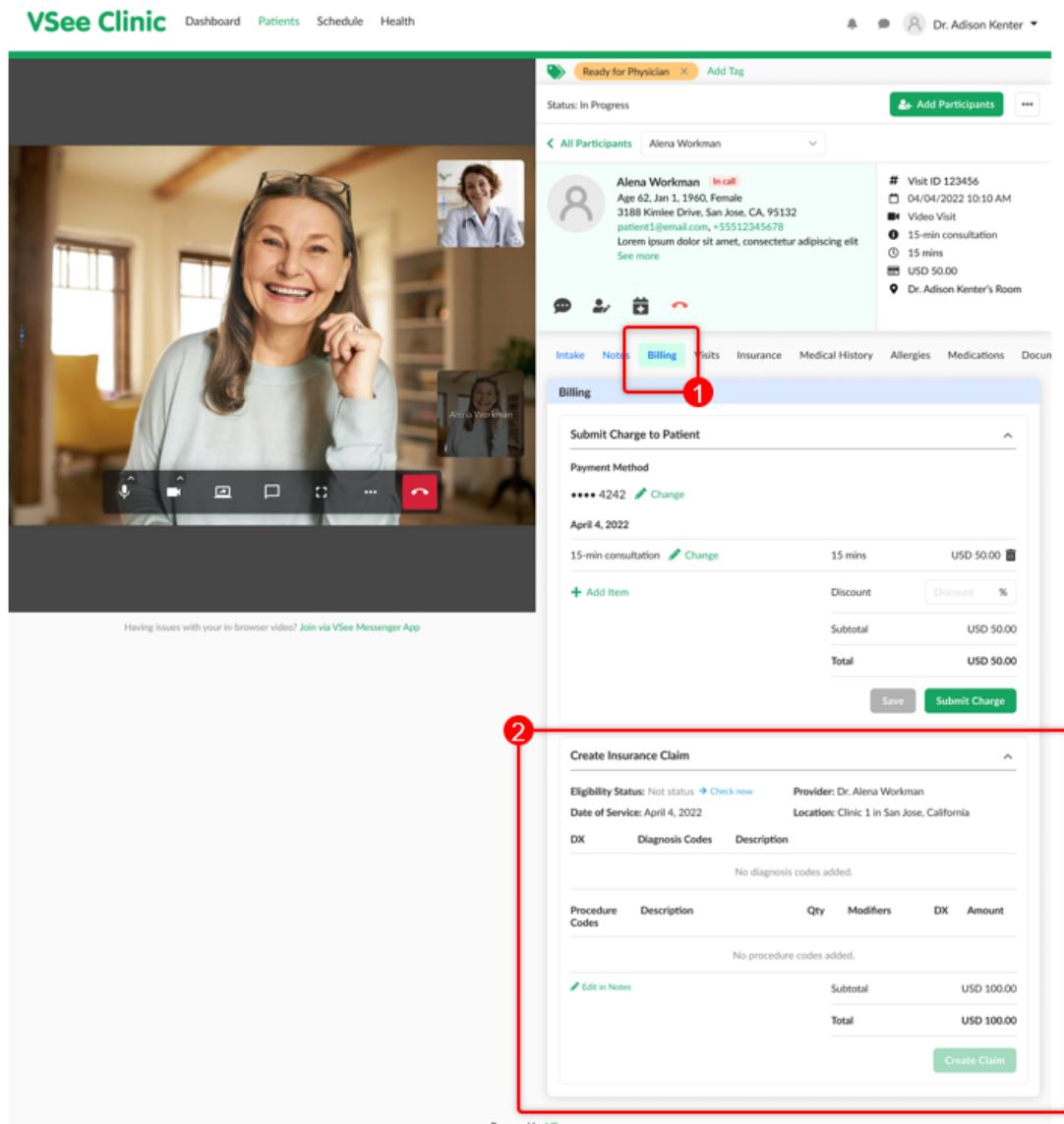
Jay-Ileen (Ai) - 2023-07-27 - [VSee Clinic for Providers](#)

Submit a medical claim to the Patient's insurance company during the visit;

Note: This feature may not be available in your clinic. Please contact [Sales](#) or your Account Manager to enable this feature.

Submitting a Claim

1. On the visit details page, click on the **Billing/Payment** tab.
2. Scroll down to view the **Create Insurance Claim** field.



The screenshot shows the VSee Clinic software interface. At the top, there is a video call interface with a patient's video feed. Below the video, there is a toolbar with various video controls. The main workspace is divided into sections: 'Ready for Physician' (with a green checkmark), 'Add Tag', 'Status: In Progress', 'Add Participants', and a participant list for 'Alena Workman'. The participant list includes basic information: Name (Alena Workman), Age (62), Gender (Female), Address (3188 Kimler Drive, San Jose, CA, 95132), Email (patient1@email.com), and Phone (55512345678). It also lists the visit details: Visit ID (123456), Date (04/04/2022 10:10 AM), Visit Type (Video Visit), Duration (15-min consultation, 15 mins), and Cost (USD 50.00). Below this, there is a navigation bar with tabs: Intake, Notes, Billing (which is highlighted with a red box and a red number '1'), Visits, Insurance, Medical History, Allergies, Medications, and Documentation. The 'Billing' tab is expanded, showing the 'Submit Charge to Patient' section. It includes a 'Payment Method' field with a placeholder '4242' and a 'Change' button. Below that is a date field 'April 4, 2022'. Underneath are sections for '15-min consultation' (15 mins, USD 50.00), 'Add Item' (with a 'Discount' field), 'Subtotal' (USD 50.00), and 'Total' (USD 50.00). At the bottom of this section are 'Save' and 'Submit Charge' buttons. A red box with a red number '2' highlights the 'Create Insurance Claim' section, which is a separate form below the main billing area. This section has fields for 'Eligibility Status' (Not status, with a 'Check now' button), 'Provider' (Dr. Alena Workman), and 'Location' (Clinic 1 in San Jose, California). It includes tables for 'DX', 'Diagnosis Codes', 'Description', 'Procedure Codes', 'Description', 'Qty', 'Modifiers', 'DX', and 'Amount'. Below these are sections for 'Edit in Notes' (with a 'Subtotal' of USD 100.00), 'Total' (USD 100.00), and a 'Create Claim' button. The bottom of the interface says 'Powered by VSee'.

3. You may click the “Check now” button to go to the “Insurance” tab and check the insurance plan’s eligibility there.

In this example, “Eligibility Status”, “Diagnosis Codes” and “Procedure Codes” are not yet filled and are empty.

*Note: You may add these codes by clicking on **Edit in Notes**. And you will be routed to the Notes tab to Add the Diagnosis and Procedure Codes for the Visit.*

Create Insurance Claim

Eligibility Status: Not status [Check now](#) 3

Provider: Dr. Alena Workman

Date of Service: April 4, 2022

Location: Clinic 1 in San Jose, California

DX	Diagnosis Codes	Description
No diagnosis codes added.		

Procedure Codes	Description	Qty	Modifiers	DX	Amount
No procedure codes added.					

[Edit in Notes](#)

Subtotal: USD 100.00

Total: USD 100.00

[Create Claim](#)

This is an example when “Diagnosis Codes” and “Procedure Codes” are already filled but the insurance eligibility is not yet complete or checked.

Create Insurance Claim

Eligibility Status: No status [Check now](#) 3

Provider: Dr. Alena Workman

Date of Service: April 4, 2022

Location: Clinic 1 in San Jose, California ▼

DX	Diagnosis Codes	Description
1	ICD-10-CM Z32.2	Childbirth education; Childbirth instruction: Childbirth Education Class
2	ICD-10-CM Z71.89	Health education; Individual or group safety & first aid education: CPR/Safety Classes

Procedure Codes	Description	Qty	Modifiers	DX	Amount
G2012	Brief communication (5-10 minutes) technology-based service, new or established	1	00, 00, 00, 00	1, 2	USD 50.00
G2010	Remote evaluation of recorded video and/or images submitted, new or established, including interpretation and follow-up within 24 business hours	1	00, 00, 00, 00		USD 50.00

[Edit in Notes](#)

Subtotal	USD 100.00
Total	USD 100.00

[Create Claim](#)

This is an example when “Diagnosis Codes” and “Procedure Codes” are already filled and insurance information is already added but the eligibility check returned an **Inactive status**. You may click the “Check now” button to go to the “Insurance” tab and check the insurance plan’s eligibility there.

Create Insurance Claim

Eligibility Status: ⚠ Inactive [Check now](#)

Provider: Dr. Alena Workman

Date of Service: April 4, 2022

Location: Clinic 1 in San Jose, California

DX	Diagnosis Codes	Description
1	ICD-10-CM Z32.2	Childbirth education; Childbirth instruction: Childbirth Education Class
2	ICD-10-CM Z71.89	Health education; Individual or group safety & first aid education: CPR/Safety Classes

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[Edit in Notes](#)

Subtotal	USD 100.00
Total	USD 100.00

Create Claim

4. Once all required details have been fulfilled in the patient's profile, you will be able to click the "Create claim" button.

The required details are:

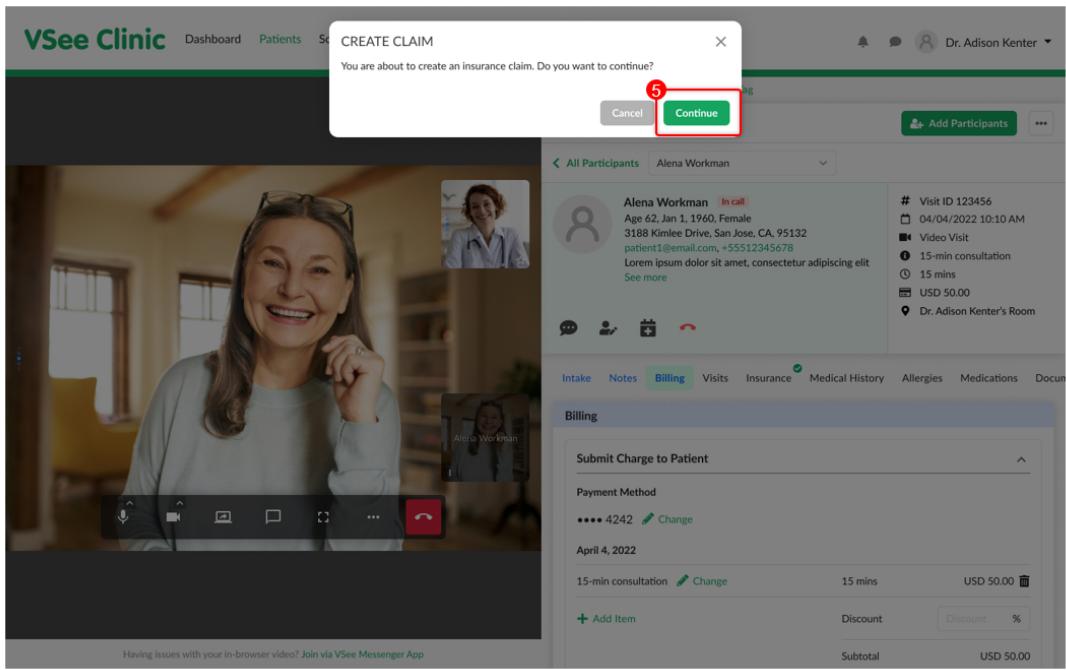
- 1) Eligibility status (Must be eligible)
- 2) Date of service
- 3) Location
- 4) Diagnosis codes
- 5) Procedure codes

Click on **Create Claim** button.

Create Insurance Claim ^

Eligibility Status: ✓ Active	Provider: Dr. Alena Workman					
Date of Service: April 4, 2022	Location: Clinic 1 in San Jose, California ▼					
DX	Diagnosis Codes	Description				
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Edit in Notes			Subtotal	USD 100.00		
			Total	USD 100.00		
4 Create Claim						

5. A confirmation popup will ask to confirm the action informing you that you are about to submit a claim for this patient. Click on **Continue**.



If ever there is an error during the creation of the claim, an error message will be displayed. You may check the claim details and try clicking "Create Claim" again.

Create Insurance Claim

There was an error while creating claim. Please try again.

Eligibility Status: ✓ Active	Provider: Dr. Alena Workman					
Date of Service: April 4, 2022	Location: Clinic 1 in San Jose, California					
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Edit in Notes			Subtotal		USD 100.00	
			Total		USD 100.00	
Create Claim						

Once the claim has been successfully created, a success message will be shown.

Create Insurance Claim

Insurance claim has been created. Ref no.: abcd1234567890

Eligibility Status: ✓ Active	Provider: Dr. Alena Workman																		
Date of Service: April 4, 2022	Location: Clinic 1 in San Jose, California																		
<table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;">DX</th> <th style="width: 30%;">Diagnosis Codes</th> <th style="width: 60%;">Description</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>ICD-10-CM Z32.2</td> <td>Childbirth education; Childbirth instruction: Childbirth Education Class</td> </tr> <tr> <td>2</td> <td>ICD-10-CM Z71.89</td> <td>Health education; Individual or group safety & first aid education: CPR/Safety Classes</td> </tr> </tbody> </table>		DX	Diagnosis Codes	Description	1	ICD-10-CM Z32.2	Childbirth education; Childbirth instruction: Childbirth Education Class	2	ICD-10-CM Z71.89	Health education; Individual or group safety & first aid education: CPR/Safety Classes									
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Create Claim

Scope and Limitations:

- An insurance claim can only be created using an insurance plan with an “Active” status.
- Currently unable to view claim status via VSee Clinic.
- Currently, the Procedure and Diagnosis details are not reflected on the invoice.

Related Articles:

- [How the Eligibility Feature Works](#)

- [How to Check Eligibility for Insurance Claims \(Provider\)](#)
- [How to Submit a Claim \(Multiple Providers\)](#)

If you have any questions, please contact us at help@vsee.com.

Last updated on: 6 December 2022

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