

## How to Add a Claim Number, Accident date and Case manager to a Client

### Clients

Accepted  
 Declined  
 Wait list

Name  
Searches Client full name

Provider  
Enter a comma separated list of user names.

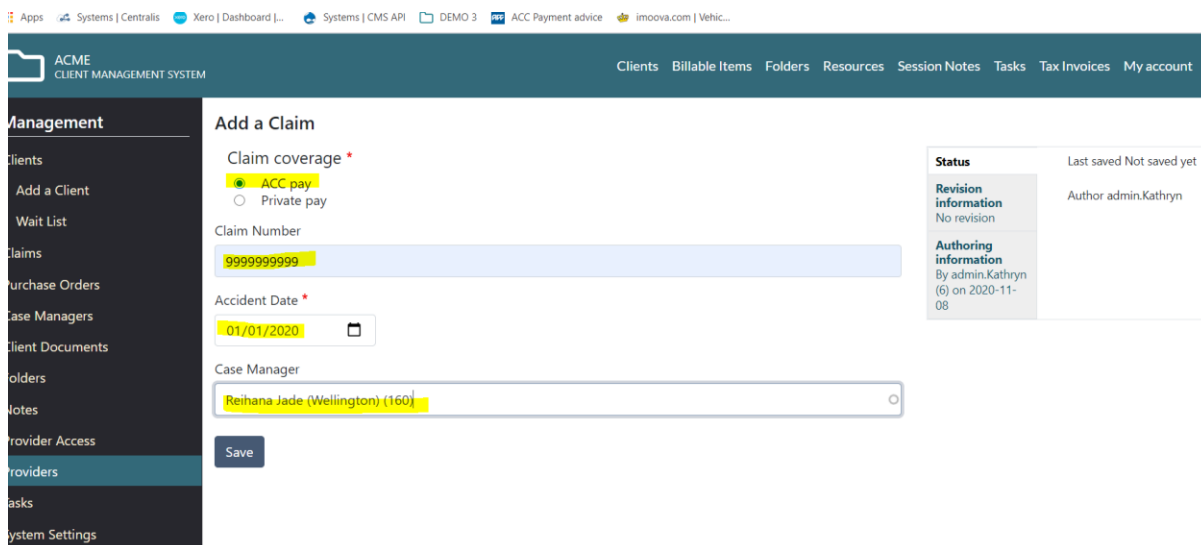
NHI

- Any -  
 active  
 inactive

Apply Add Client

ID	Name	Primary Provider	NHI	Status	Active	Edit	Claim
1	Doe, Jane	Rose Garden		Accepted	<input checked="" type="checkbox"/>	edit	<a href="#">Add a Claim</a>
12	Dog, Pluto	Rose Garden		Accepted	<input checked="" type="checkbox"/>	edit	<a href="#">Add a Claim</a>
9	Duck, Donald	Rod Stewart		Accepted	<input checked="" type="checkbox"/>	edit	<a href="#">Add a Claim</a>
5	Giant, Green	Rose Garden		Accepted	<input checked="" type="checkbox"/>	edit	<a href="#">Add a Claim</a>
6	Grass, Green	Rose Garden		Accepted	<input checked="" type="checkbox"/>	edit	<a href="#">Add a Claim</a>
14	khardashian, kim	Rod Stewart		Accepted	<input checked="" type="checkbox"/>	edit	<a href="#">Add a Claim</a>
16	Log, Larry	Rose Garden		Accepted	<input checked="" type="checkbox"/>	edit	<a href="#">Add a Claim</a>
4	Max, Mad			Accepted	<input checked="" type="checkbox"/>	edit	<a href="#">Add a Claim</a>
2	Moose, Murray	Rose Garden		Accepted	<input checked="" type="checkbox"/>	edit	<a href="#">Add a Claim</a>

Locate the client, click ADD A CLAIM.



ACME CLIENT MANAGEMENT SYSTEM

Clients Billable Items Folders Resources Session Notes Tasks Tax Invoices My account

**Management**

Clients  
 Add a Client  
 Wait List  
 Claims  
 Purchase Orders  
 Case Managers  
 Client Documents  
 Folders  
 Notes  
 Provider Access  
 Providers  
 Tasks  
 System Settings

**Add a Claim**

Claim coverage \*  
 ACC pay  
 Private pay

Claim Number

Accident Date \*

Case Manager

Save

**Status** Last saved Not saved yet  
**Revision information** Author admin.Kathryn  
 No revision  
**Authoring information**  
 By admin.Kathryn (6) on 2020-11-08

Claim will always default to ACC PAY – change if private client.

Add claim no., accident date (ensuring not prior to client’s DOB or in the future – can use start date of first PO) and Case Manager (these are currently found by using the last name of the case manager to search).

SAVE