

# **ARCHIVING CLAIMS**

## Archiving Claims in PC-ACE Pro32

Reasons to Archive claims:

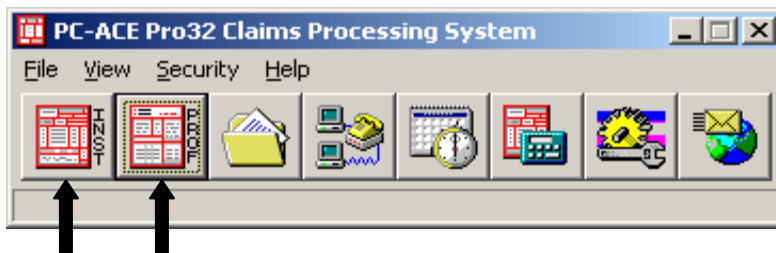
- It reduces the size and optimizes the performance of the current claims database.
- It eliminates claims that are no longer of interest from the current claims database, making it easier to locate and work with the current claims.
- It promotes organized storage of older claims without requiring you to purge these claims.

Claim archives can be maintained by transmit date, line-of-business, "submission" payer or other preferred criteria.

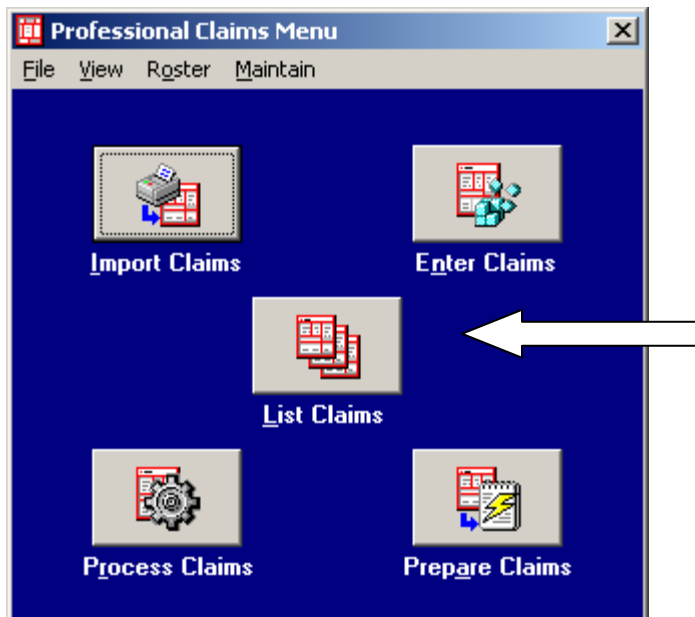
Archived claims can be viewed and printed just like claims located in the Transmitted Only (TR) location in the current database.

To archive and unarchive claims, follow these steps:

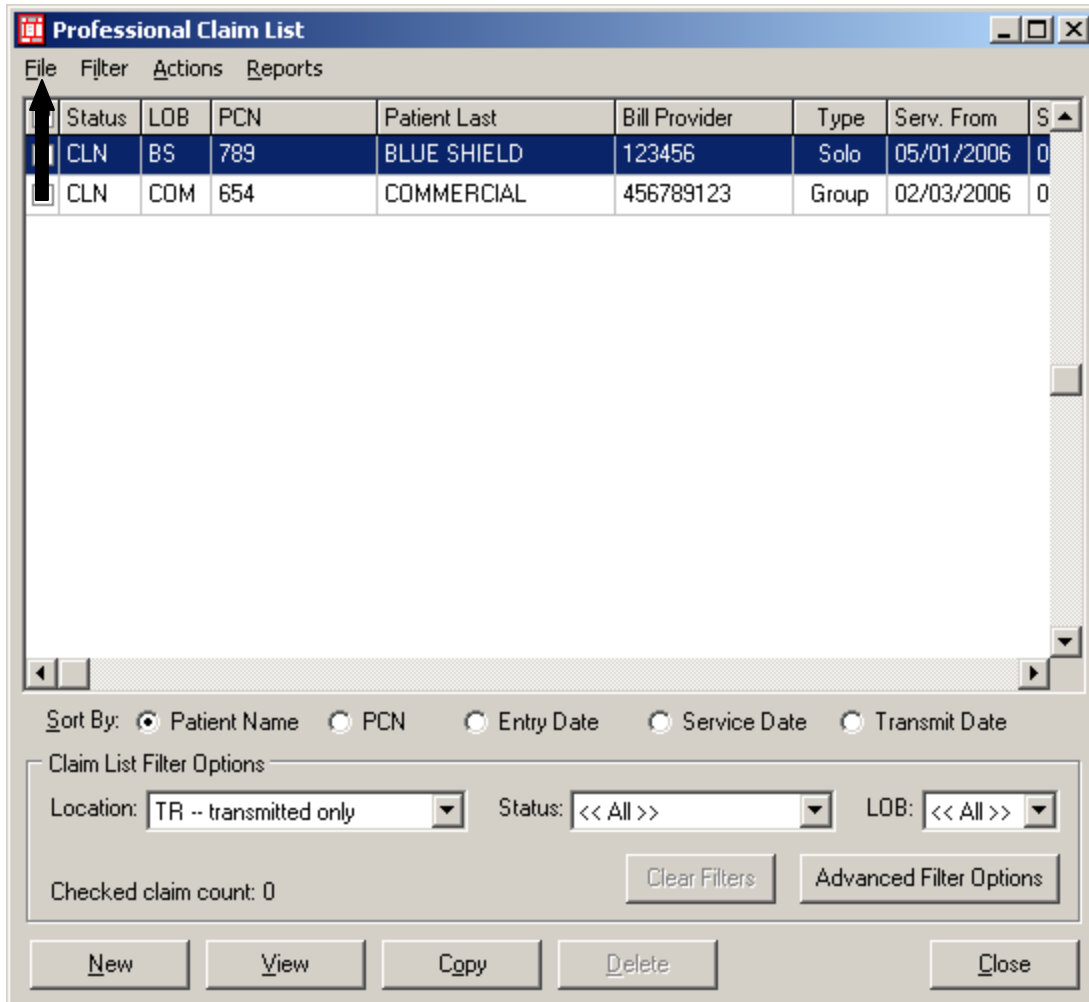
From the PC-ACE Pro32 Main Toolbar, click either the Institutional Claims Processing button or the Professional Claims Processing button to display the Claims Menu.



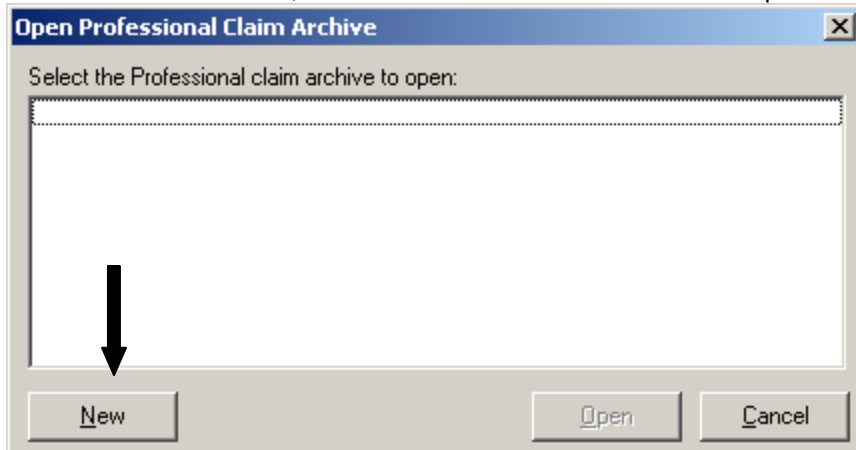
Click the List Claims button on the Claims Menu to display the list of claims. By default, the list will display claims in the "to be transmitted (CL) location.



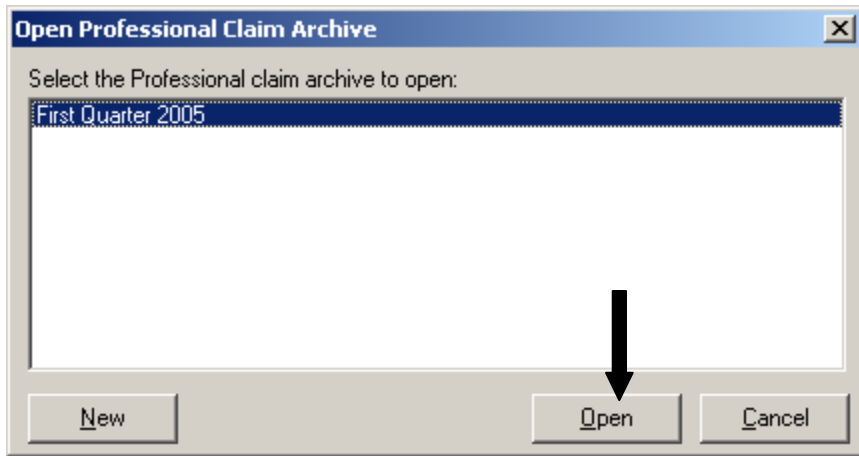
From the Claim List, click File on the toolbar, select the Open Claim Archive to display the Open Claim Archive form. This will display a list of all existing claim archives (if any).



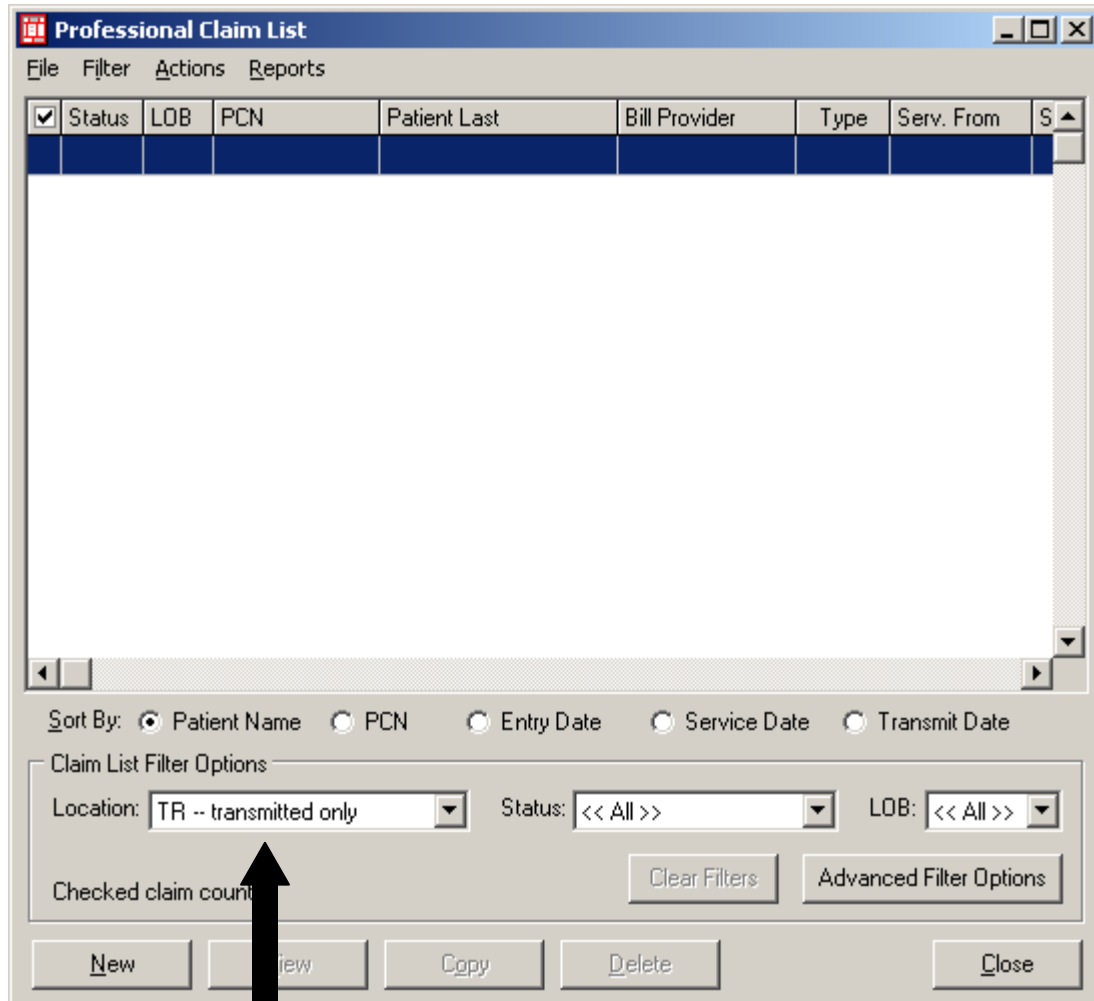
To create a new archive, click the New button and enter a descriptive name for the new archive.



The empty archive file will be created and the entry will be added to the selection list. Select the new archive from the list and click the Open button (or double click the new file to open). The new claim archive file will be opened and you will be returned to the Claim List.

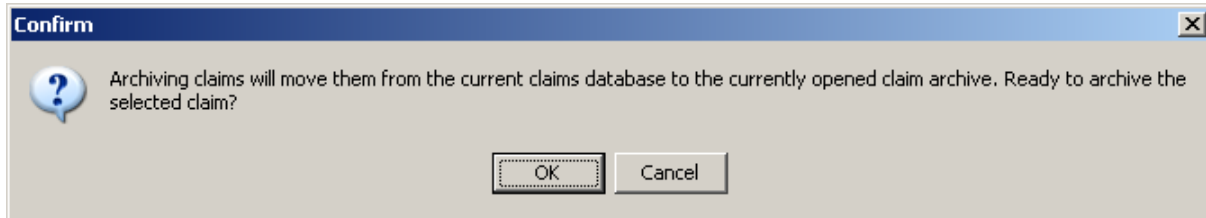


Only claims from the Transmitted only locations (TR) can be archived. Change the Location to transmitted only (TR).

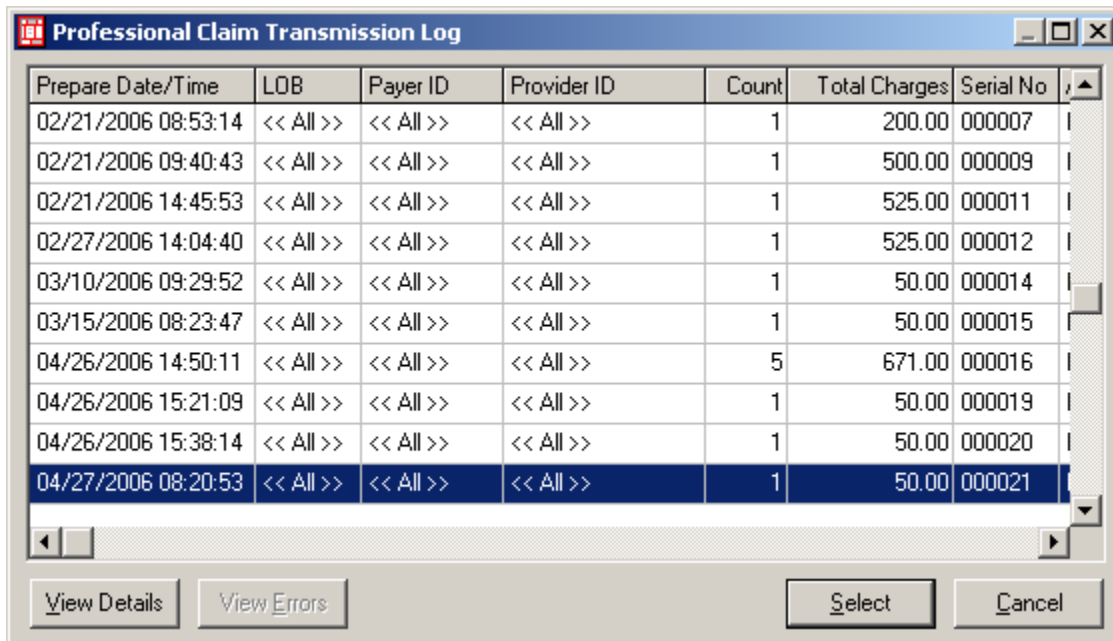


To archive a single claim, select the desired claim from the list, go to the Actions option on the toolbar and select Archive Select Claim. You will receive the message below, click OK to have the claim moved to the open archive file. The selected claim will disappear from the current claims list.

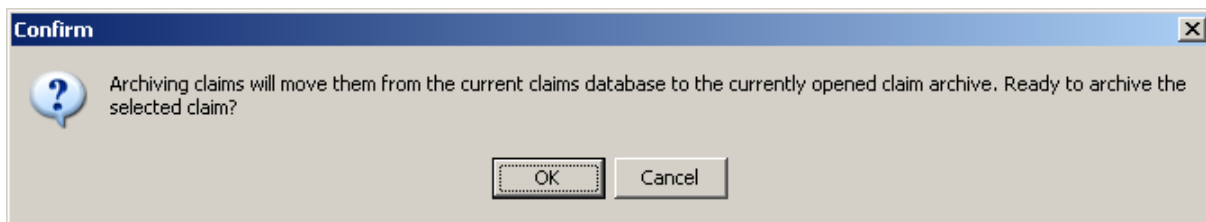
To Archive multiple claims at once, simply check the desired claims from the list, go to the Actions option on the toolbar and Archive All Checked Claims. You will receive the message below, click OK to have the claim moved to the open archive file. All checked claims will disappear from the current claims list.



To Archive an entire batch of claims go to Filter on the toolbar, select Check All Claims from Selected Transmission, the window below will appear, highlight the batch you would like to archive and click select.

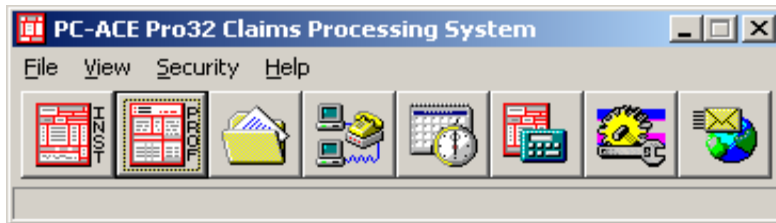


Go to the Actions option on the toolbar, select Archive All Checked Claims. You will receive the following message, click OK.

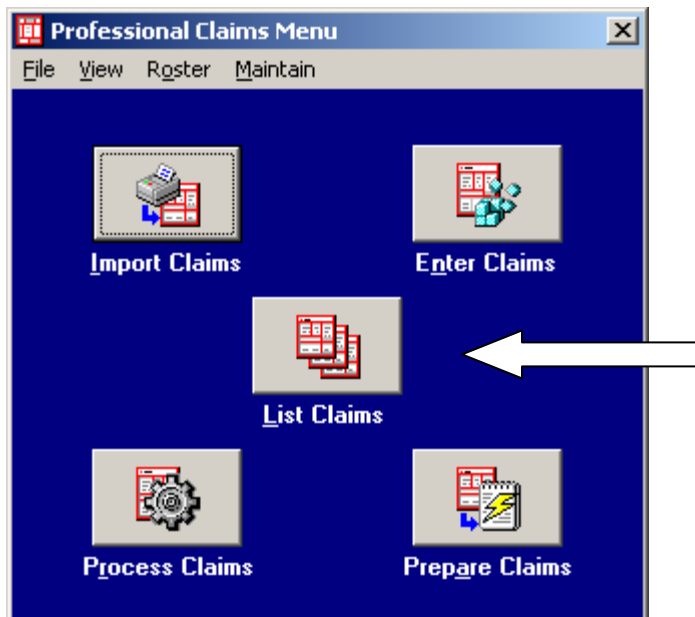


## To locate/view and/or Unarchive your file:

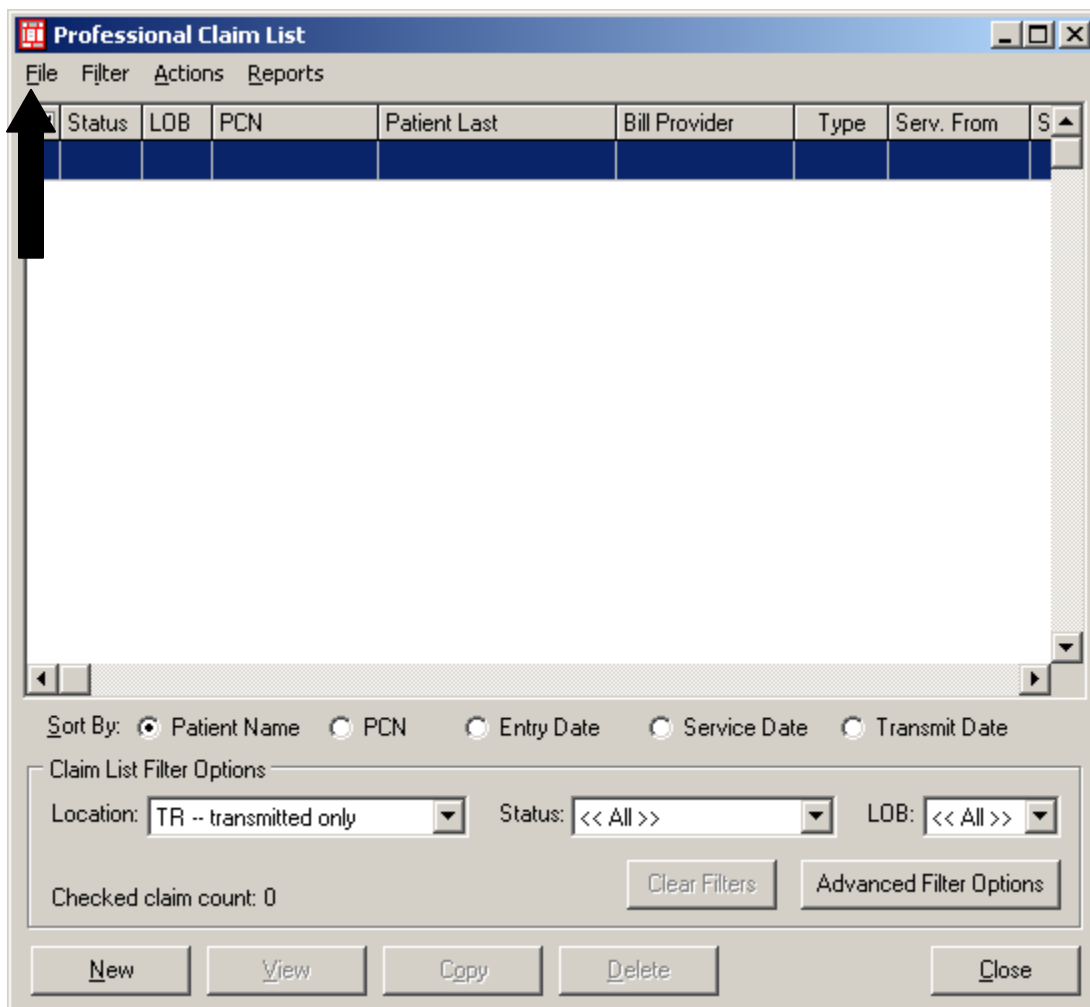
From the PC-ACE Pro32 Main Toolbar, click either the institutional Claims Processing button or the Professional Claims Processing button to display the Claims Menu.



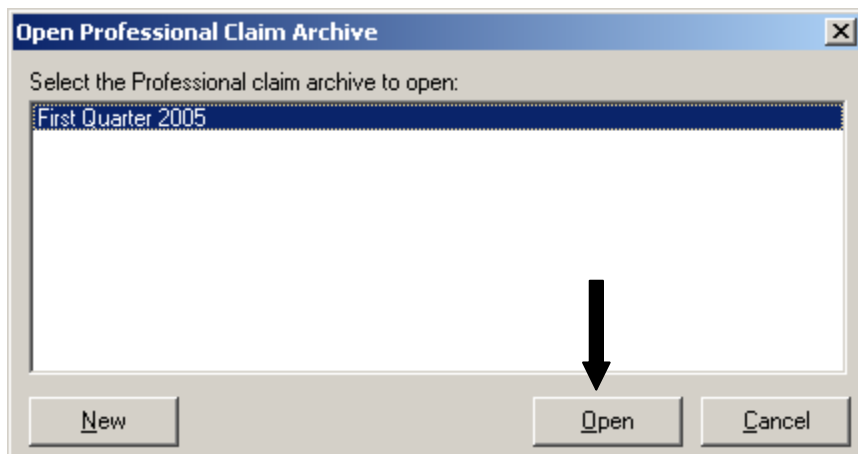
Click the List Claims button on the Claims Menu to display the list of claims. By default, the list will display claims in the "to be transmitted (CL) location.



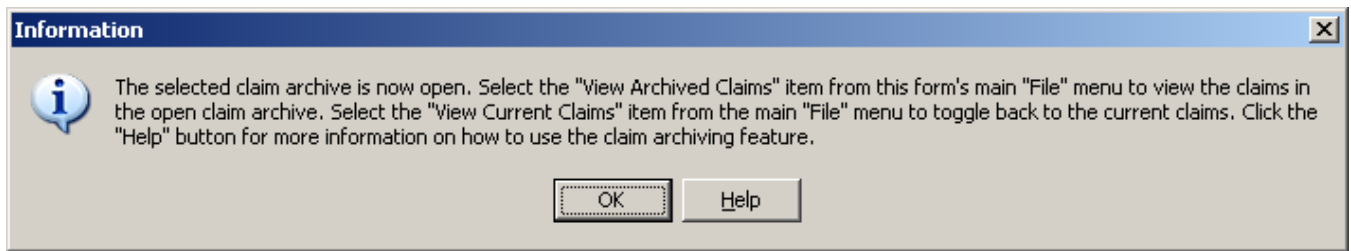
From the Claims List, click File on the toolbar, select the Open Claim Archive-- to display the Open Claim Archive files.



This will display a list of all existing claim archives files. Open the archive file you wish to review by highlighting the file name and clicking Open or by double clicking on the file name.

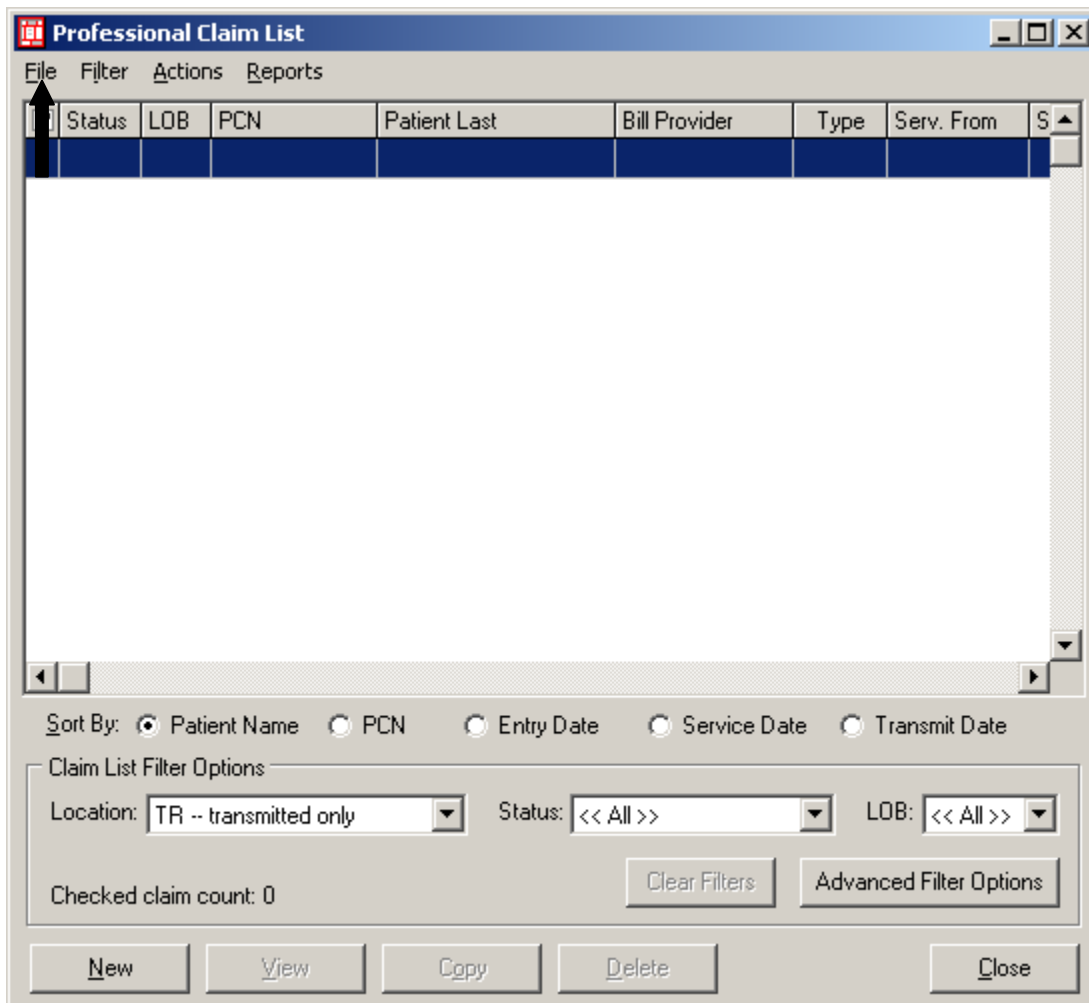


You will receive the following message. Click OK.



Go to File on the toolbar, and select View Archived Claims. This will bring up a list of your archived claims within the archive file. You can view your selected claims from this location.

You can also **Unarchive** your claims from this location by checking the desired claim (s) and choosing either the Unarchive Selected Claim or the Unarchive All Checked Claims from the Actions option on the toolbar.



Select the Close Claim Archive item from the File option on the toolbar to close the open claim archive. You will be prompted to “pack” the claim archive before closing. Click the “Yes” button to pack and close the archive. Click the “No” button to close the archive without packing. Click the “Cancel” button to leave the archive open.

\*\*Packing a claim archive database minimizes the disk space requirements and enhances performance. It is recommended that claim archive databases be packed periodically. The packing process can be lengthy for large databases. Once the packing operation has started, it must continue to completion. It is recommended that “packing” claims only when no other users are accessing PC-ACE Pro32.