

# Turquoise Claims System

## Claims Templates

### Participant User Guide

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## 1 Introduction

Claim templates are designed to streamline and simplify the process of creating new claims by reusing previously entered data. By utilizing templates, users can automatically populate applicable fields and focus only on updating the specific information that is unique to the new claim. Unique services and treatments could be stored for future claim processing.

Users have the flexibility to create and manage multiple templates for each of the supported claim types:

- Dental
- Professional
- Institutional

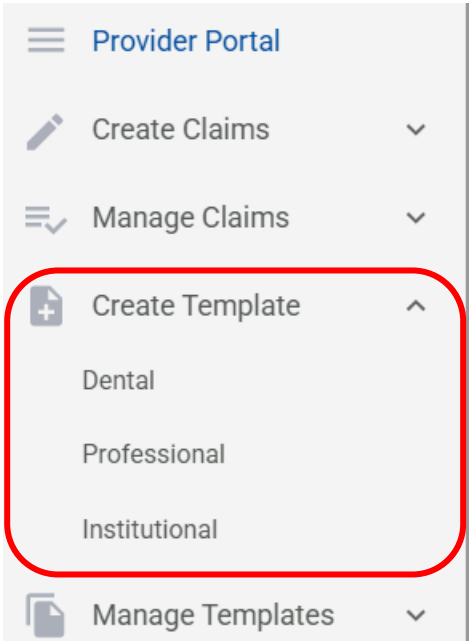
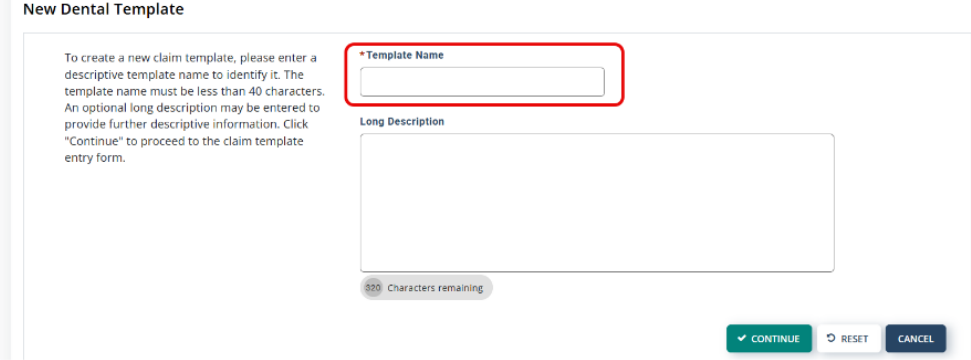
The Manage Templates tool provides a centralized location for users to:

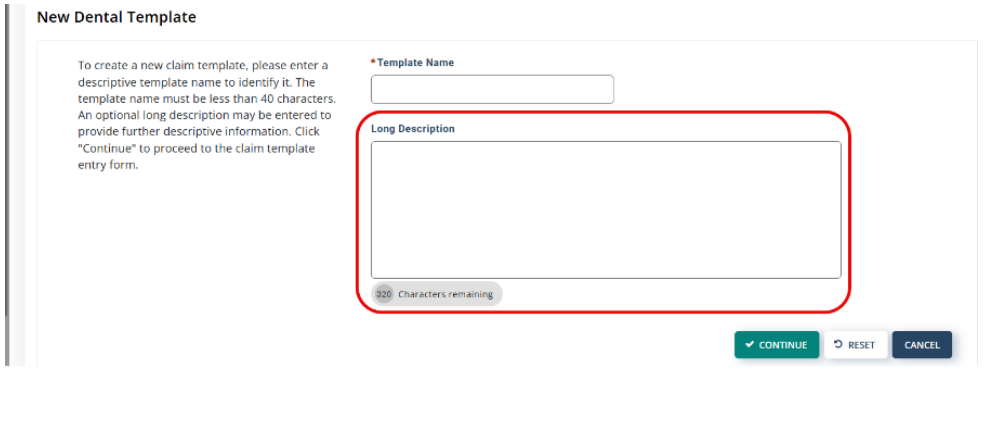
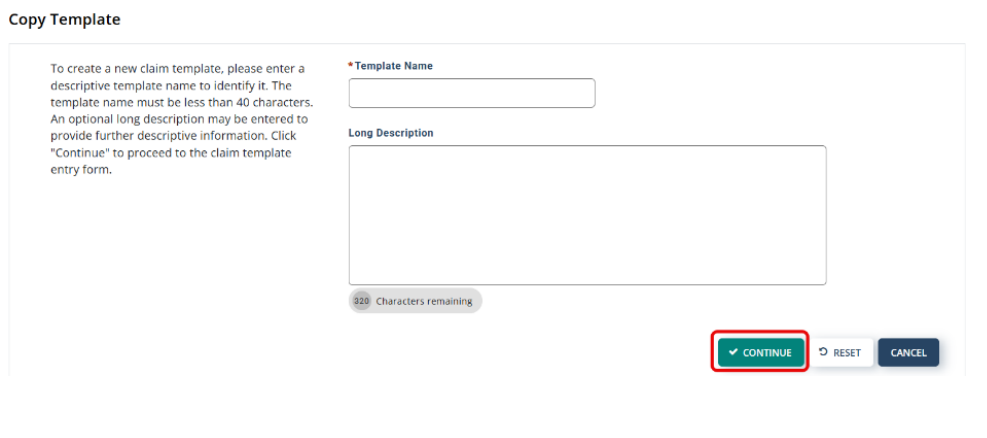
- View all previously saved templates
- Edit existing templates as needed
- Delete outdated or unused templates
- Copy templates to serve as a starting point for creating new ones

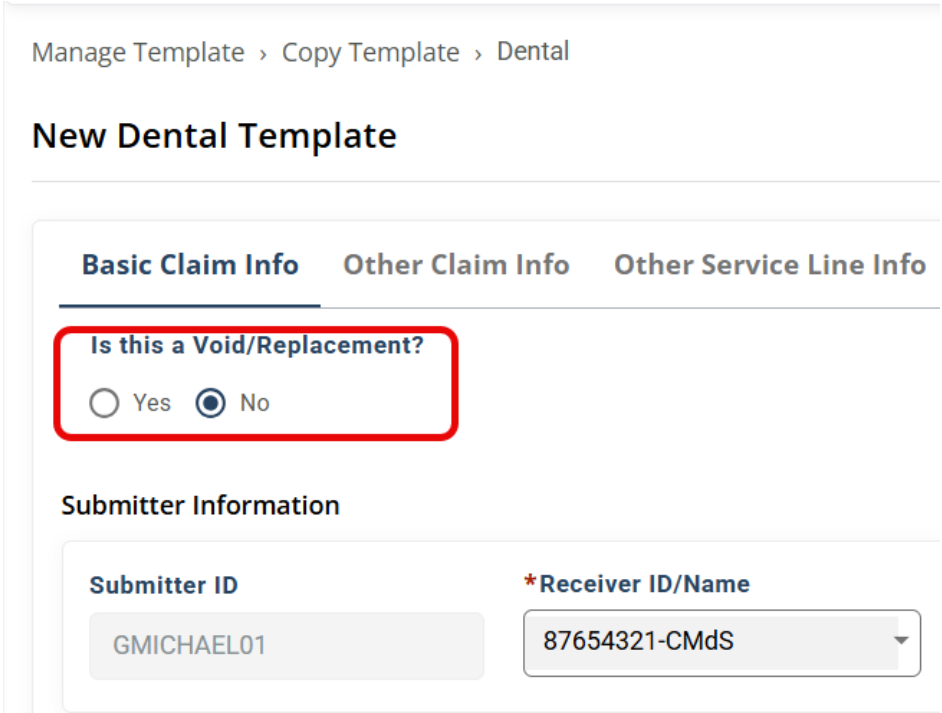
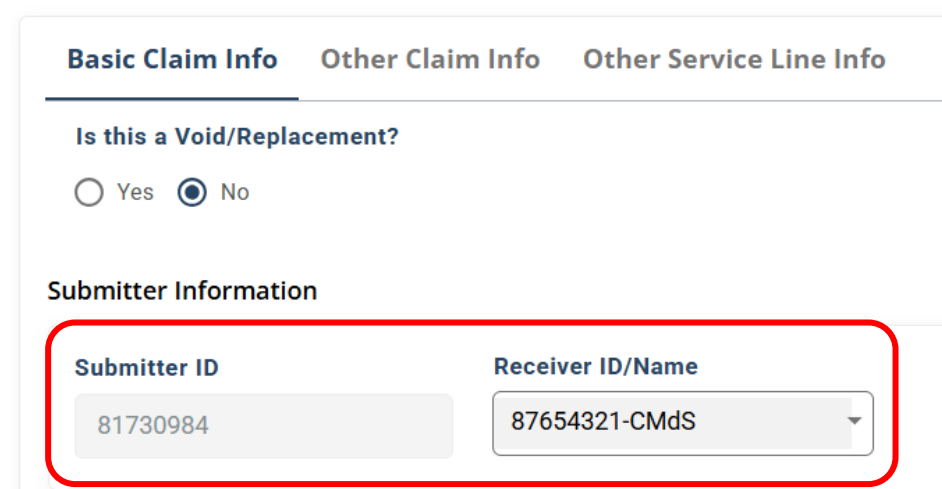
## 2 Create a Claim Template

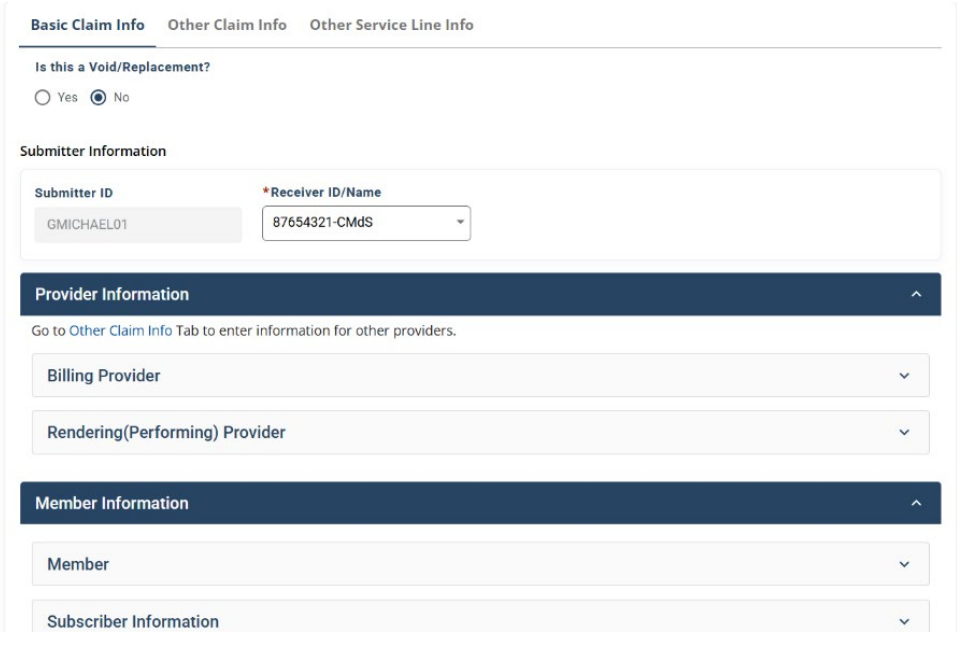
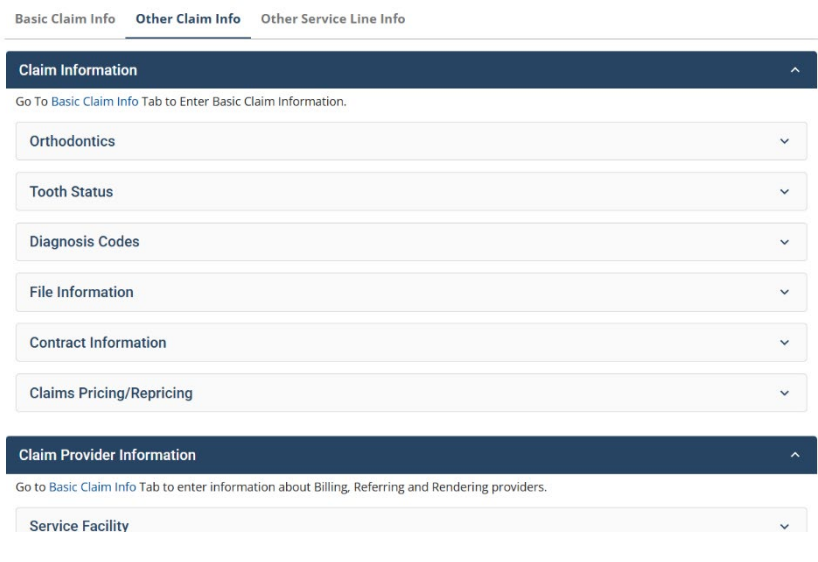
The system allows users to create claim templates, making it easier and faster to generate new claims by reusing previously entered data.

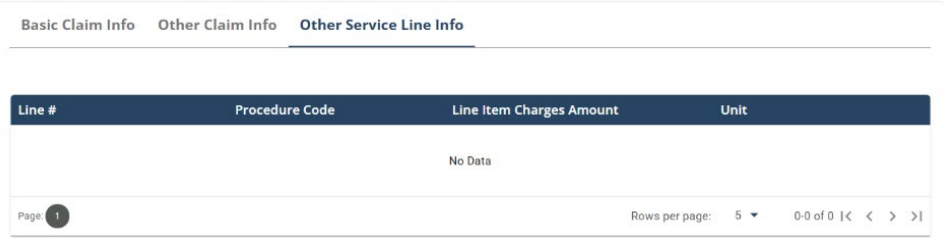
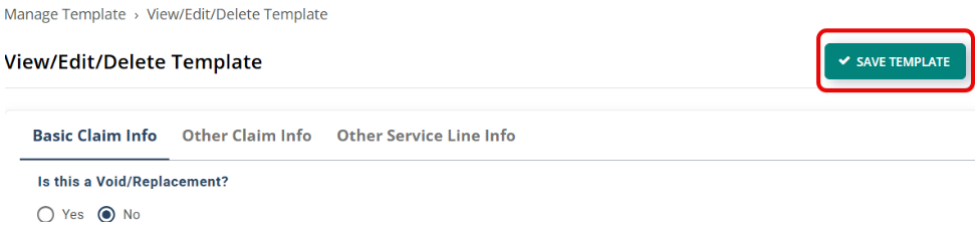
To create a claim template, complete the following steps:

Step	Screenshot
<p>1. From the <b>Create Template</b> menu, select the desired claim type.</p>	
<p>2. On the <b>New Template</b> page, enter a <b>Template Name</b>. The Template Name must be less than 40 characters.</p>	

Step	Screenshot
<p>3. Enter a <b>Long Description</b>. This field is used to provide further descriptive information about the template. It is an optional field.</p>	 <p><b>New Dental Template</b></p> <p>To create a new claim template, please enter a descriptive template name to identify it. The template name must be less than 40 characters. An optional long description may be entered to provide further descriptive information. Click "Continue" to proceed to the claim template entry form.</p> <p>*Template Name</p> <p>Long Description</p> <p>320 Characters remaining</p> <p>CONTINUE RESET CANCEL</p>
<p>4. Select the <b>Continue</b> button.</p>	 <p><b>Copy Template</b></p> <p>To create a new claim template, please enter a descriptive template name to identify it. The template name must be less than 40 characters. An optional long description may be entered to provide further descriptive information. Click "Continue" to proceed to the claim template entry form.</p> <p>*Template Name</p> <p>Long Description</p> <p>320 Characters remaining</p> <p>CONTINUE RESET CANCEL</p>

Step	Screenshot
<p>5. On the <b>New Claim Template</b> page, under the <b>Basic Claim Info</b> tab, the system defaults to 'No' for the "Is this a Void/Replacement?" field.</p>	 <p>Manage Template › Copy Template › Dental</p> <h3>New Dental Template</h3> <p><b>Basic Claim Info</b>   Other Claim Info   Other Service Line Info</p> <p><b>Is this a Void/Replacement?</b></p> <p><input type="radio"/> Yes   <input checked="" type="radio"/> No</p> <p><b>Submitter Information</b></p> <p><b>Submitter ID</b>   <b>*Receiver ID/Name</b></p> <p>GMICHAEL01   87654321-CMdS</p>
<p>6. The <b>Submitter ID</b> and the <b>Receiver ID/Name</b> fields are automatically populated by the system.</p> <p>The <b>Submitter ID</b> is the Medicaid ID of the entity submitting the claim.</p> <p>The <b>Receiver ID/Name</b> field identifies the entity receiving the submitted claim.</p>	 <p><b>Basic Claim Info</b>   Other Claim Info   Other Service Line Info</p> <p><b>Is this a Void/Replacement?</b></p> <p><input type="radio"/> Yes   <input checked="" type="radio"/> No</p> <p><b>Submitter Information</b></p> <p><b>Submitter ID</b>   <b>Receiver ID/Name</b></p> <p>81730984   87654321-CMdS</p>

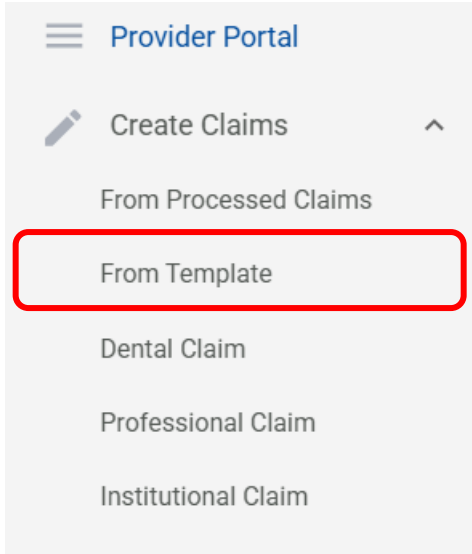
Step	Screenshot
<p>7. Complete the required fields on the <b>Basic Claim Info</b> tab. Those fields have a red asterisk (*). Certain services require additional information to be entered on the <b>Other Claim Info</b> tab.</p>	
<p>8. Complete the required fields on the <b>Other Claim Info</b> tab, as applicable.</p>	

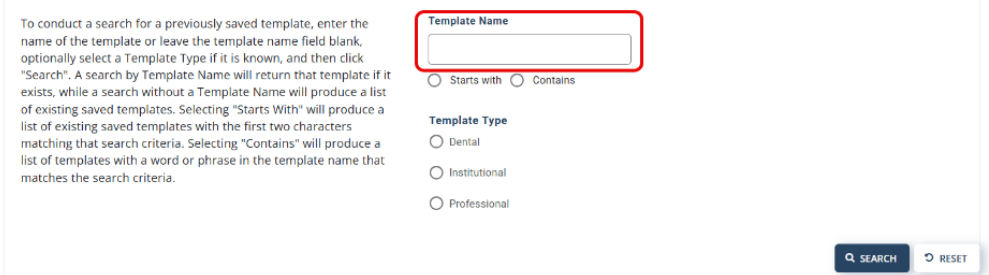
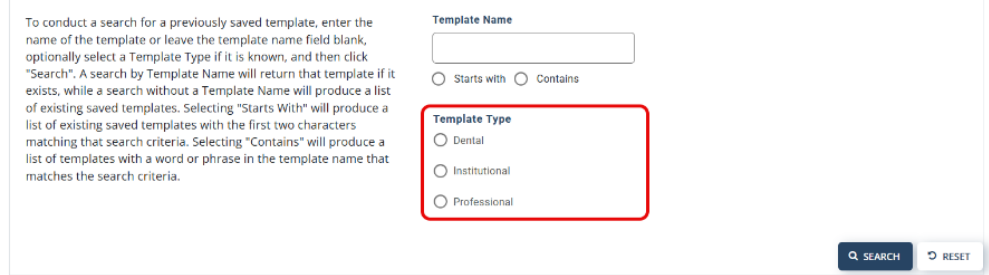
Step	Screenshot
<p>9. The <b>Other Services Line Info</b> tab returns the line information entered and is for viewing only. Any edits need to be made on the <b>Basic Claim Info</b> page.</p>	
<p>10. Complete the necessary fields in the other panels and then select the <b>Save Template</b> button.</p>	

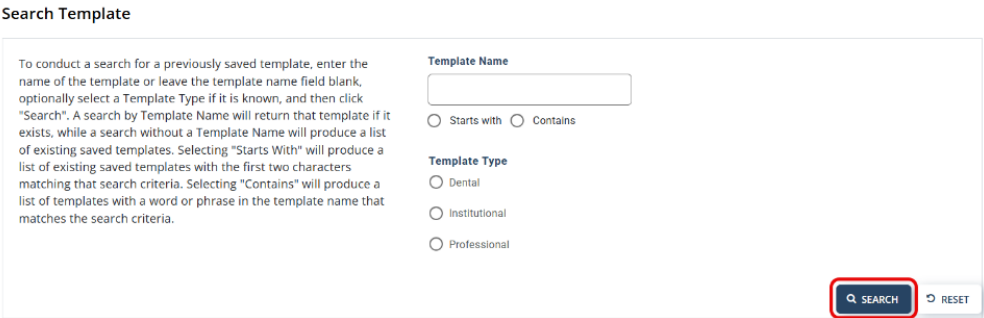
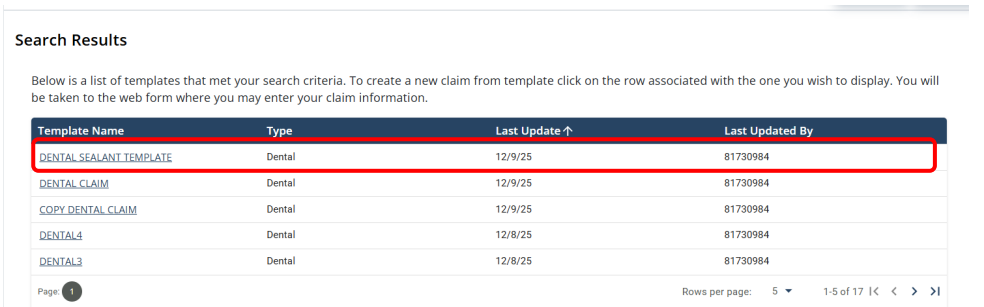
### 2.1 Create a New Claim from an Existing Template

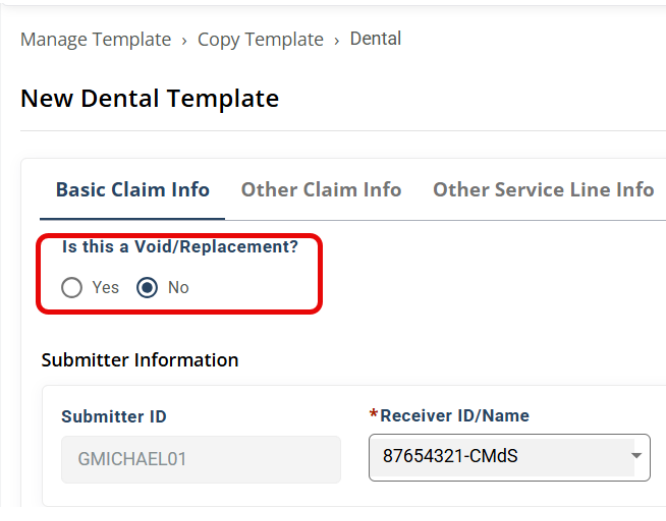
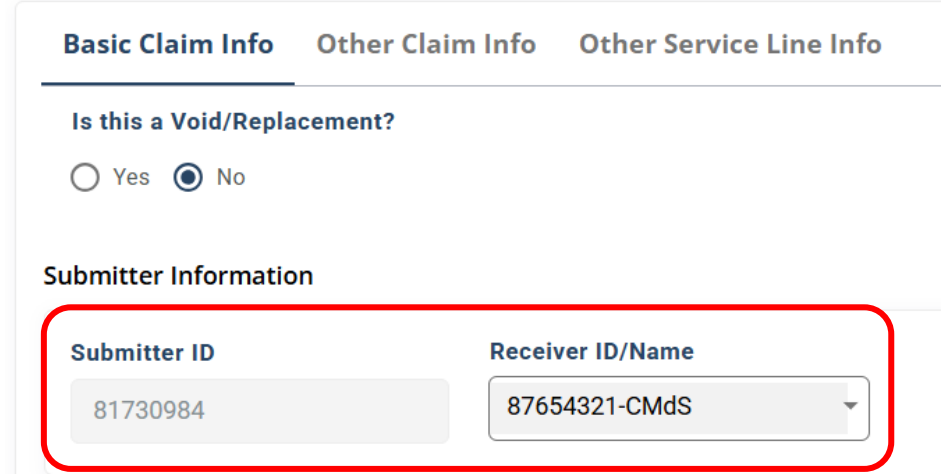
The system allows users to generate a new claim from an existing template. Users can begin with a current template, customize it as needed, and save it as a new claim.

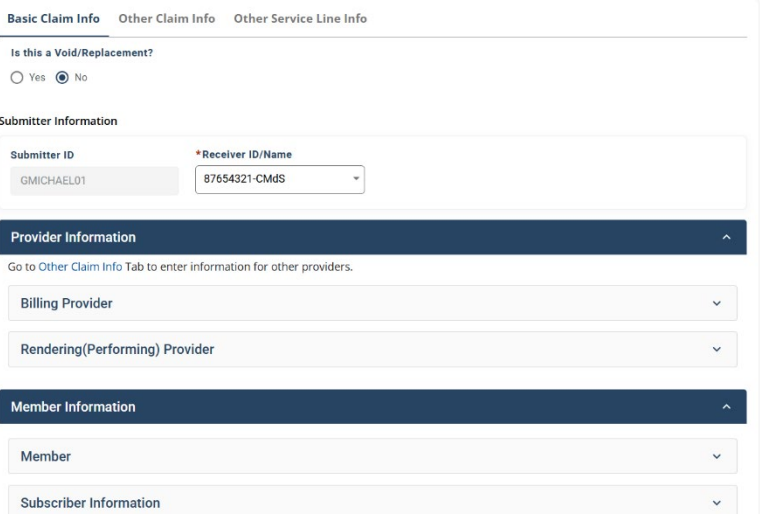
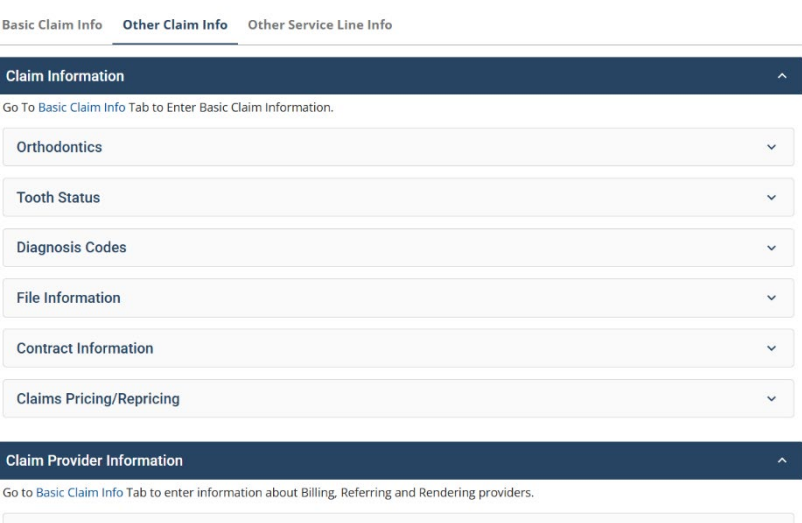
To create a new claim from an existing template, complete the following steps:

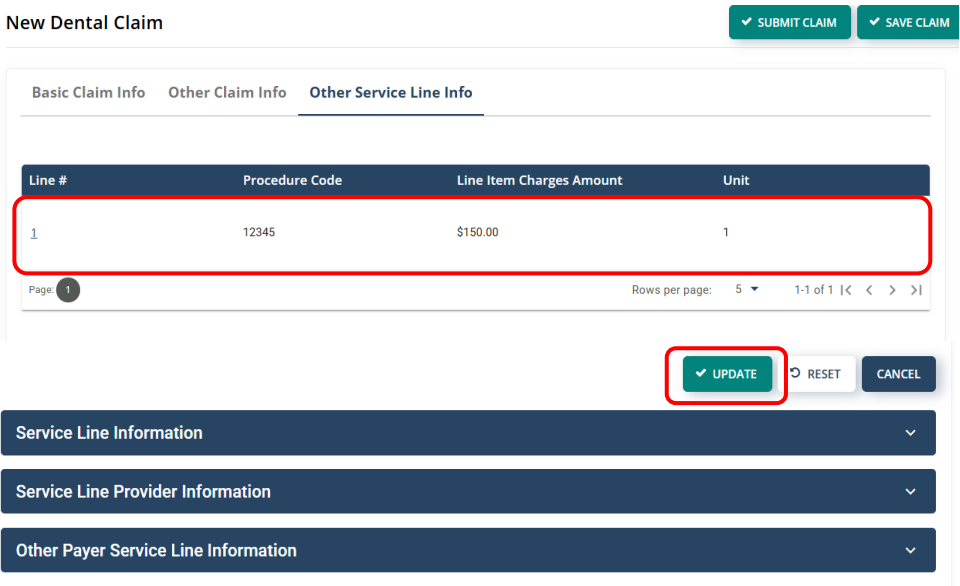
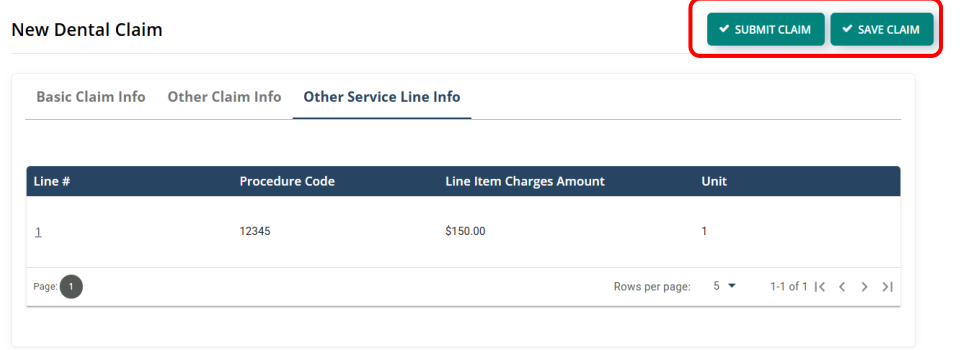
Step	Screenshot
<p>1. From the <b>Create Claims</b> menu, select <b>From Template</b>.</p>	 <p>The screenshot shows a dropdown menu titled 'Create Claims' with an upward arrow. The menu items are: 'From Processed Claims', 'From Template' (highlighted with a red rectangle), 'Dental Claim', 'Professional Claim', and 'Institutional Claim'.</p>

Step	Screenshot
<p>2. On the <b>Search Template</b> page, enter the <b>Template Name</b>.</p> <p><b>Notes:</b> <i>Selecting "Starts With" will produce a list of existing saved templates with the first two characters matching that search criteria.</i></p> <p><i>Selecting "Contains" will produce a list of templates with a word or phrase in the Template Name that matches the search criteria.</i></p>	 <p>The screenshot shows the 'Search Template' interface. On the left, there is instructional text: 'To conduct a search for a previously saved template, enter the name of the template or leave the template name field blank, optionally select a Template Type if it is known, and then click "Search". A search by Template Name will return that template if it exists, while a search without a Template Name will produce a list of existing saved templates. Selecting "Starts With" will produce a list of existing saved templates with the first two characters matching that search criteria. Selecting "Contains" will produce a list of templates with a word or phrase in the template name that matches the search criteria.'</p> <p>The 'Template Name' input field is highlighted with a red rectangular box. Below it are radio buttons for 'Starts with' and 'Contains'. Further down is the 'Template Type' section with radio buttons for 'Dental', 'Institutional', and 'Professional'. At the bottom right, there are 'SEARCH' and 'RESET' buttons.</p>
<p>3. Select the <b>Template Type</b>.</p> <p><b>Note:</b> <i>Selecting a template type is not a mandatory step in the process. The system allows users to proceed with or without selecting, and the functionality remains unaffected.</i></p>	 <p>This screenshot is identical to the one above, showing the 'Search Template' interface. However, the 'Template Type' section, which includes radio buttons for 'Dental', 'Institutional', and 'Professional', is highlighted with a red rectangular box.</p>

Step	Screenshot																								
<p>4. Select the <b>Search</b> button.</p> <p><b>Note:</b> A search by <i>Template Name</i> will return that template if it exists. A search without a <i>Template Name</i> will produce a list of templates with a word or phrase in the <i>Template Name</i> that matches the search criteria.</p>	 <p><b>Search Template</b></p> <p>To conduct a search for a previously saved template, enter the name of the template or leave the template name field blank, optionally select a Template Type if it is known, and then click "Search". A search by Template Name will return that template if it exists, while a search without a Template Name will produce a list of existing saved templates. Selecting "Starts With" will produce a list of existing saved templates with the first two characters matching that search criteria. Selecting "Contains" will produce a list of templates with a word or phrase in the template name that matches the search criteria.</p> <p>Template Name <input type="text"/></p> <p><input type="radio"/> Starts with <input type="radio"/> Contains</p> <p>Template Type</p> <p><input type="radio"/> Dental</p> <p><input type="radio"/> Institutional</p> <p><input type="radio"/> Professional</p> <p><input type="button" value="SEARCH"/> <input type="button" value="RESET"/></p>																								
<p>5. A list of results matching your search criteria will be displayed. When only one template is created, the system automatically navigates to the claims page. However, if multiple templates exist, the user is prompted to select from the available options before proceeding.</p>	 <p><b>Search Results</b></p> <p>Below is a list of templates that met your search criteria. To create a new claim from template click on the row associated with the one you wish to display. You will be taken to the web form where you may enter your claim information.</p> <table border="1"> <thead> <tr> <th>Template Name</th> <th>Type</th> <th>Last Update ↑</th> <th>Last Updated By</th> </tr> </thead> <tbody> <tr> <td><a href="#">DENTAL SEALANT TEMPLATE</a></td> <td>Dental</td> <td>12/9/25</td> <td>81730984</td> </tr> <tr> <td><a href="#">DENTAL CLAIM</a></td> <td>Dental</td> <td>12/9/25</td> <td>81730984</td> </tr> <tr> <td><a href="#">COPY DENTAL CLAIM</a></td> <td>Dental</td> <td>12/9/25</td> <td>81730984</td> </tr> <tr> <td><a href="#">DENTAL4</a></td> <td>Dental</td> <td>12/8/25</td> <td>81730984</td> </tr> <tr> <td><a href="#">DENTAL3</a></td> <td>Dental</td> <td>12/8/25</td> <td>81730984</td> </tr> </tbody> </table> <p>Page: 1 Rows per page: 5 1-5 of 17   &lt; &gt; &gt;&gt;</p>	Template Name	Type	Last Update ↑	Last Updated By	<a href="#">DENTAL SEALANT TEMPLATE</a>	Dental	12/9/25	81730984	<a href="#">DENTAL CLAIM</a>	Dental	12/9/25	81730984	<a href="#">COPY DENTAL CLAIM</a>	Dental	12/9/25	81730984	<a href="#">DENTAL4</a>	Dental	12/8/25	81730984	<a href="#">DENTAL3</a>	Dental	12/8/25	81730984
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<a href="#">DENTAL SEALANT TEMPLATE</a>	Dental	12/9/25	81730984																						
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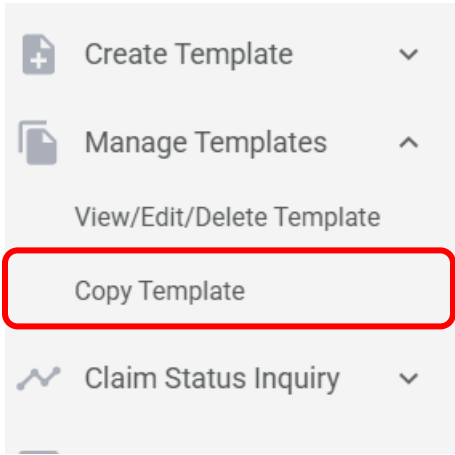
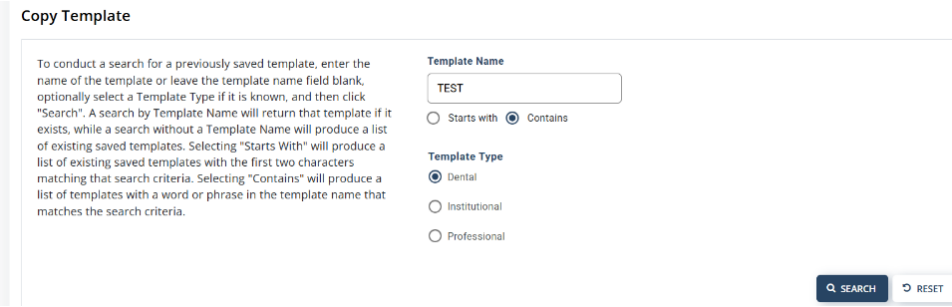
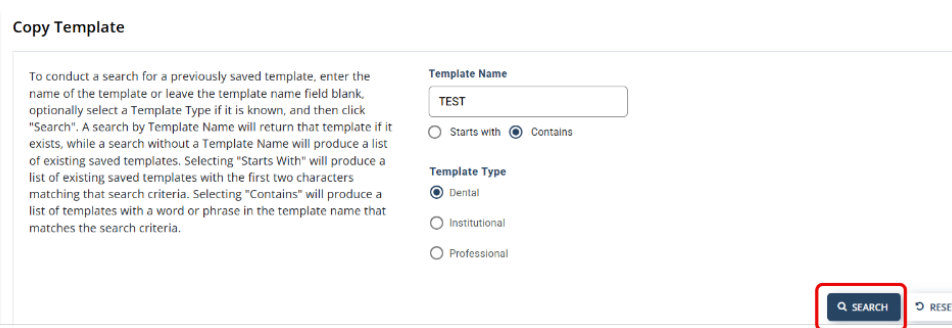
Step	Screenshot
<p>6. On the <b>New Claim Template</b> page, under the <b>Basic Claim Info</b> tab, the system defaults to 'No' for the "Is this a Void/Replacement" option.</p>	 <p>Manage Template &gt; Copy Template &gt; Dental</p> <p><b>New Dental Template</b></p> <p><b>Basic Claim Info</b> Other Claim Info Other Service Line Info</p> <p>Is this a Void/Replacement?</p> <p><input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p>Submitter Information</p> <p>Submitter ID: GMICHAEL01      *Receiver ID/Name: 87654321-CMdS</p>
<p>7. The <b>Submitter ID</b> and the <b>Receiver ID/Name</b> fields are automatically populated by the system.</p> <p>The <b>Submitter ID</b> is the Medicaid ID of the entity submitting the claim.</p> <p>The <b>Receiver ID/Name</b> field identifies the entity receiving the submitted claim.</p>	 <p><b>Basic Claim Info</b> Other Claim Info Other Service Line Info</p> <p>Is this a Void/Replacement?</p> <p><input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p>Submitter Information</p> <p>Submitter ID: 81730984      Receiver ID/Name: 87654321-CMdS</p>

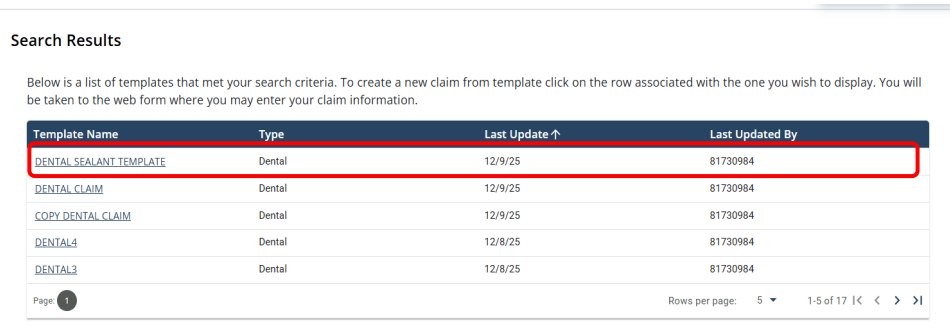
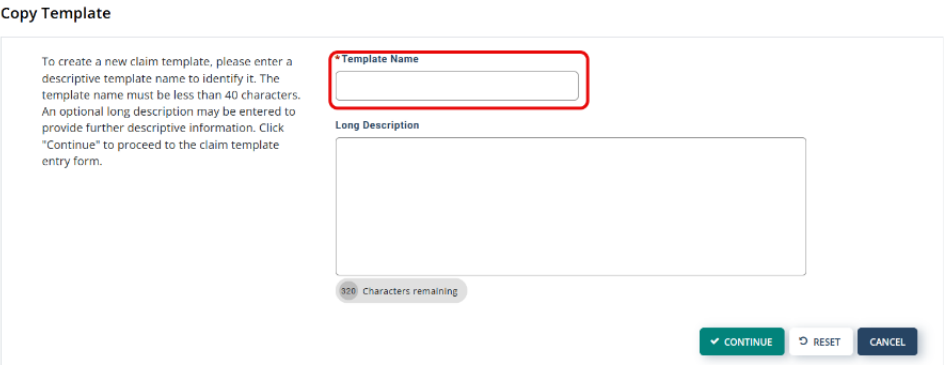
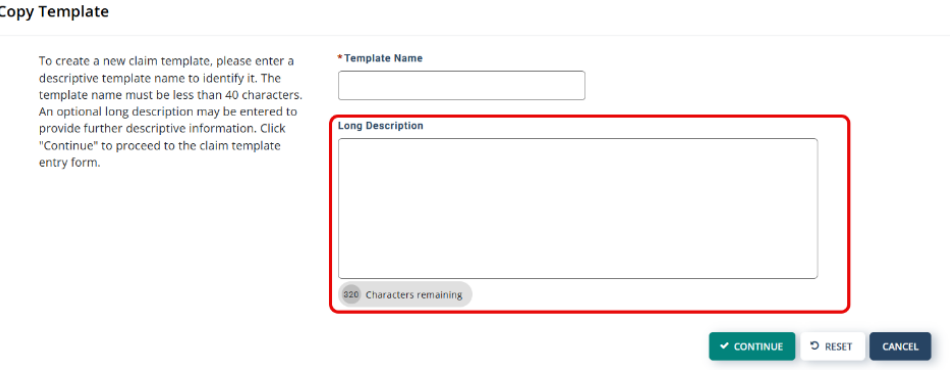
Step	Screenshot
<p>8. Complete the required fields on the <b>Basic Claim Info</b> tab. Those fields have a red asterisk (*). Certain services require additional information to be entered on the <b>Other Claim Info</b> tab.</p>	
<p>9. Complete the required fields on the <b>Other Claim Info</b> tab, as applicable.</p>	

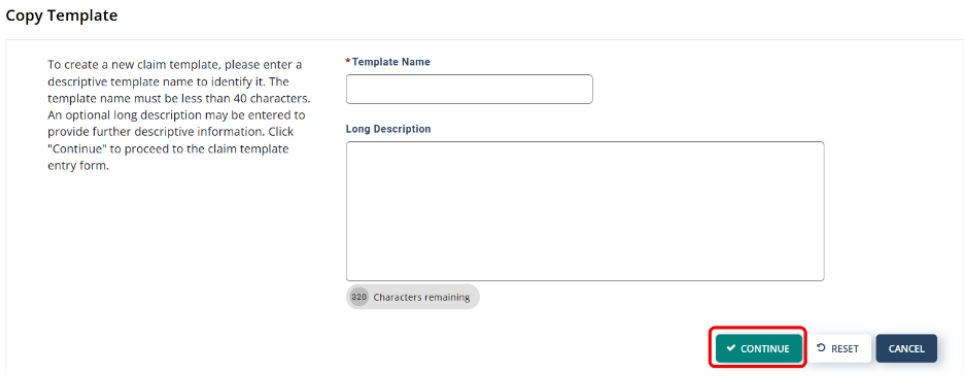
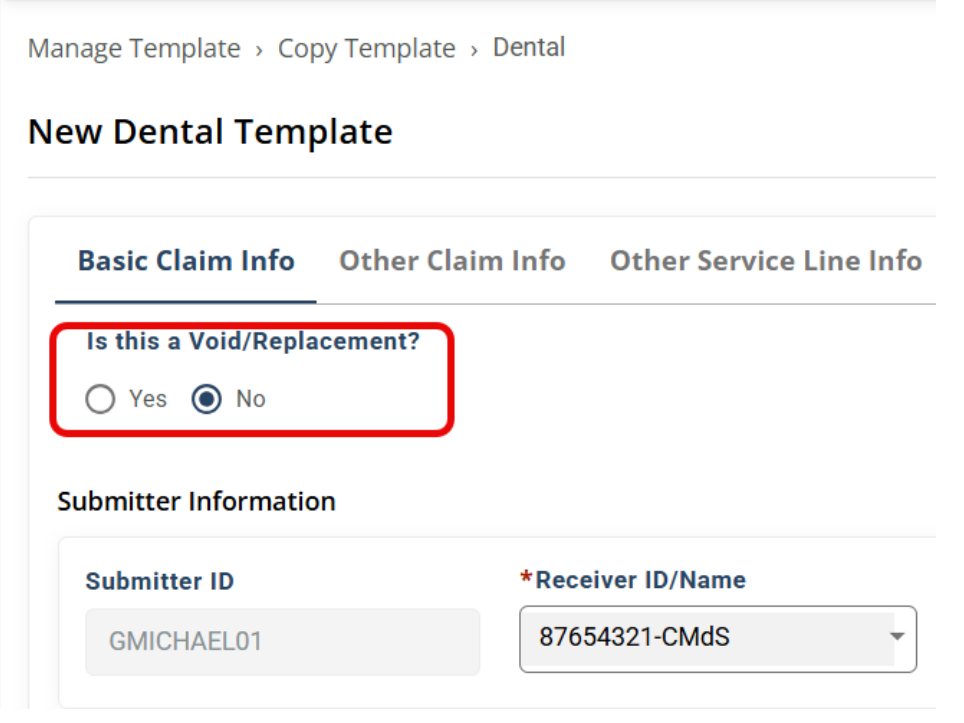
Step	Screenshot								
<p>10. The <b>Other Service Line Info</b> tab will display the basic line item information added on the <b>Basic Claim Info</b> tab. The line item cannot be edited, but additional information can be added by selecting the line item row. There are additional panels that can be expanded to add additional information and then select the <b>Update</b> button once complete.</p>	 <p>New Dental Claim</p> <p>Basic Claim Info Other Claim Info <b>Other Service Line Info</b></p> <table border="1"> <thead> <tr> <th>Line #</th> <th>Procedure Code</th> <th>Line Item Charges Amount</th> <th>Unit</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>12345</td> <td>\$150.00</td> <td>1</td> </tr> </tbody> </table> <p>Page: 1 Rows per page: 5 1-1 of 1  &lt; &gt; </p> <p><b>UPDATE</b> RESET CANCEL</p> <p>Service Line Information</p> <p>Service Line Provider Information</p> <p>Other Payer Service Line Information</p>	Line #	Procedure Code	Line Item Charges Amount	Unit	1	12345	\$150.00	1
Line #	Procedure Code	Line Item Charges Amount	Unit						
1	12345	\$150.00	1						
<p>11. Once the fields are completed, select the <b>Save Claim</b> or <b>Submit Claim</b> button, depending on if you want to save an incomplete claim or submit a completed claim.</p>	 <p>New Dental Claim</p> <p><b>SUBMIT CLAIM</b> <b>SAVE CLAIM</b></p> <p>Basic Claim Info Other Claim Info <b>Other Service Line Info</b></p> <table border="1"> <thead> <tr> <th>Line #</th> <th>Procedure Code</th> <th>Line Item Charges Amount</th> <th>Unit</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>12345</td> <td>\$150.00</td> <td>1</td> </tr> </tbody> </table> <p>Page: 1 Rows per page: 5 1-1 of 1  &lt; &gt; </p>	Line #	Procedure Code	Line Item Charges Amount	Unit	1	12345	\$150.00	1
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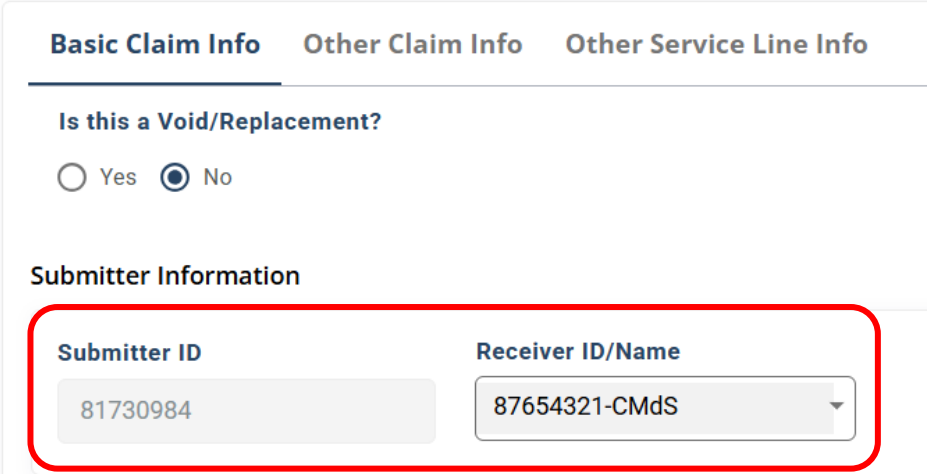
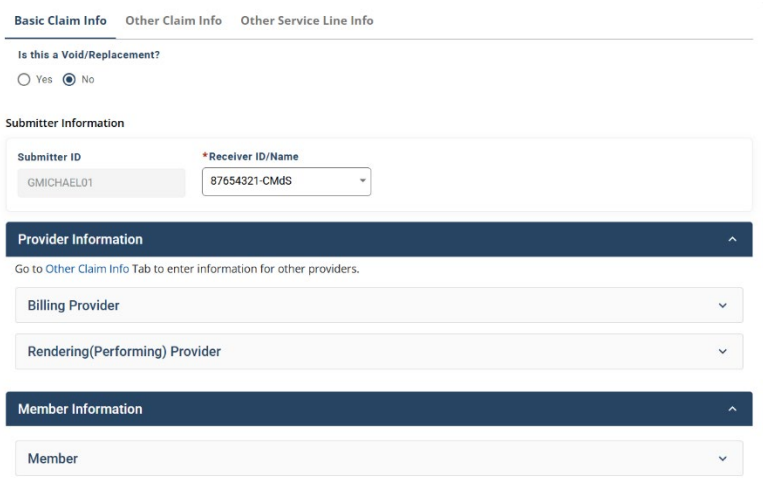
## 2.2 Create a Claim Template from an Existing Template

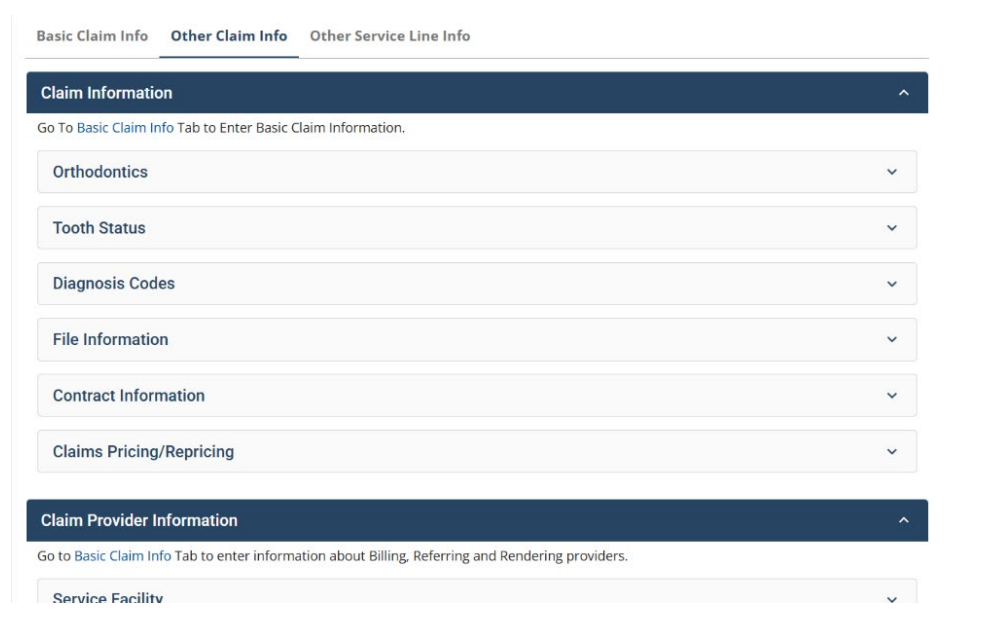
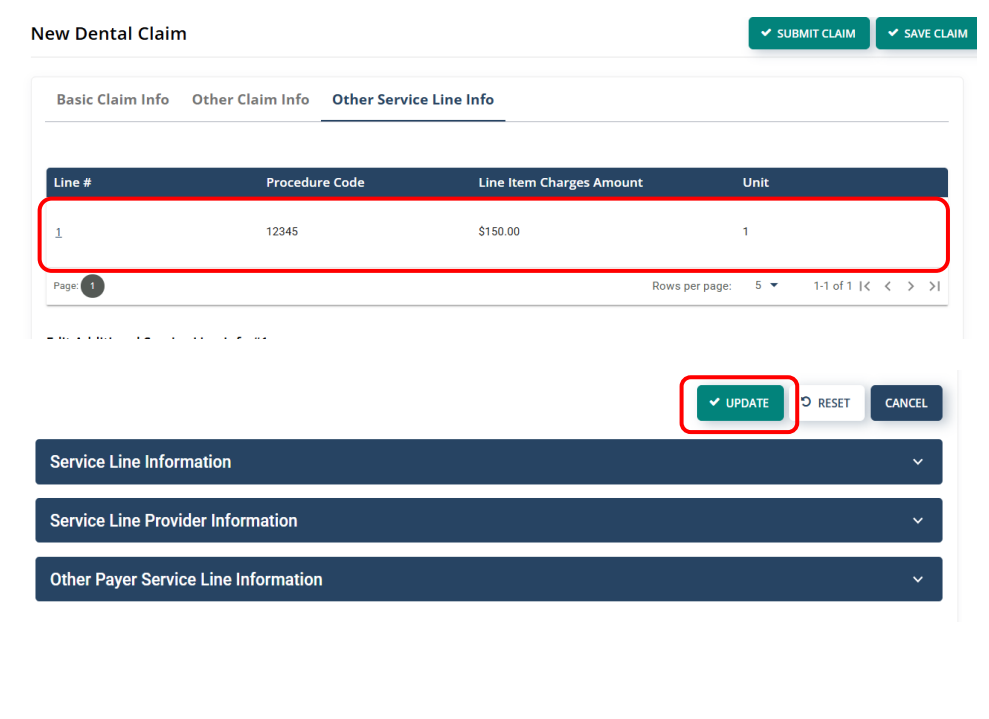
The system allows users to create new templates by duplicating existing ones. The user can start with a current template, make the necessary modifications, and save it as a new custom template. To do this, complete the following steps:

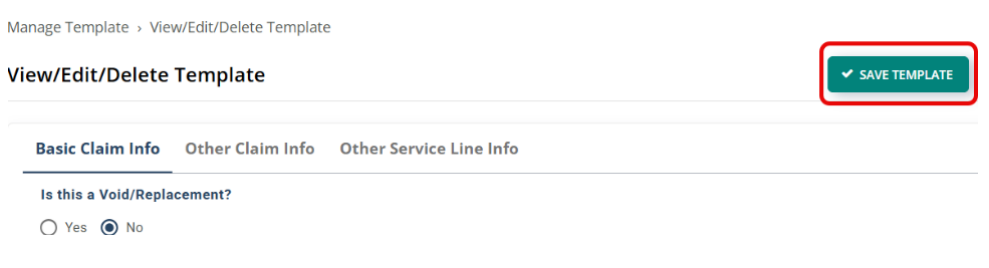
Step	Screenshot
<p>1. From the <b>Manage Templates</b> menu, select <b>Copy Template</b>.</p>	
<p>2. On the <b>Copy Template</b> page, enter your search criteria by entering the <b>Template Name</b> or the <b>Template Type</b>.</p>	
<p>3. Select the <b>Search</b> button.</p>	

Step	Screenshot																								
<p>4. A list of results matching your search criteria will be displayed. When only one template is created, the system automatically navigates to the claims page. However, if multiple templates exist, the user is prompted to select from the available options before proceeding.</p>	 <p><b>Search Results</b></p> <p>Below is a list of templates that met your search criteria. To create a new claim from template click on the row associated with the one you wish to display. You will be taken to the web form where you may enter your claim information.</p> <table border="1"> <thead> <tr> <th>Template Name</th> <th>Type</th> <th>Last Update ↑</th> <th>Last Updated By</th> </tr> </thead> <tbody> <tr> <td>DENTAL SEALANT TEMPLATE</td> <td>Dental</td> <td>12/9/25</td> <td>81730984</td> </tr> <tr> <td>DENTAL CLAIM</td> <td>Dental</td> <td>12/9/25</td> <td>81730984</td> </tr> <tr> <td>COPY DENTAL CLAIM</td> <td>Dental</td> <td>12/9/25</td> <td>81730984</td> </tr> <tr> <td>DENTAL4</td> <td>Dental</td> <td>12/8/25</td> <td>81730984</td> </tr> <tr> <td>DENTAL3</td> <td>Dental</td> <td>12/8/25</td> <td>81730984</td> </tr> </tbody> </table> <p>Page: 1 Rows per page: 5 1-5 of 17   &lt; &gt;  </p>	Template Name	Type	Last Update ↑	Last Updated By	DENTAL SEALANT TEMPLATE	Dental	12/9/25	81730984	DENTAL CLAIM	Dental	12/9/25	81730984	COPY DENTAL CLAIM	Dental	12/9/25	81730984	DENTAL4	Dental	12/8/25	81730984	DENTAL3	Dental	12/8/25	81730984
Template Name	Type	Last Update ↑	Last Updated By																						
DENTAL SEALANT TEMPLATE	Dental	12/9/25	81730984																						
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DENTAL4	Dental	12/8/25	81730984																						
DENTAL3	Dental	12/8/25	81730984																						
<p>5. On the <b>Copy Template</b> page, enter the new <b>Template Name</b>.</p>	 <p><b>Copy Template</b></p> <p>To create a new claim template, please enter a descriptive template name to identify it. The template name must be less than 40 characters. An optional long description may be entered to provide further descriptive information. Click "Continue" to proceed to the claim template entry form.</p> <p>*Template Name <input type="text"/></p> <p>Long Description <input type="text"/></p> <p>320 Characters remaining</p> <p>CONTINUE RESET CANCEL</p>																								
<p>6. Enter the <b>Long Description</b>. This is an optional field.</p>	 <p><b>Copy Template</b></p> <p>To create a new claim template, please enter a descriptive template name to identify it. The template name must be less than 40 characters. An optional long description may be entered to provide further descriptive information. Click "Continue" to proceed to the claim template entry form.</p> <p>*Template Name <input type="text"/></p> <p>Long Description <input type="text"/></p> <p>320 Characters remaining</p> <p>CONTINUE RESET CANCEL</p>																								

Step	Screenshot
<p>7. Select the <b>Continue</b> button.</p>	 <p>Copy Template</p> <p>To create a new claim template, please enter a descriptive template name to identify it. The template name must be less than 40 characters. An optional long description may be entered to provide further descriptive information. Click "Continue" to proceed to the claim template entry form.</p> <p>*Template Name</p> <p>Long Description</p> <p>320 Characters remaining</p> <p>CONTINUE RESET CANCEL</p>
<p>8. On the <b>New Claim Template</b> page, under the <b>Basic Claim Info</b> tab, the system defaults to 'No' for the "Is this a Void/Replacement?" field.</p>	 <p>Manage Template &gt; Copy Template &gt; Dental</p> <h3>New Dental Template</h3> <p>Basic Claim Info Other Claim Info Other Service Line Info</p> <p>Is this a Void/Replacement?</p> <p><input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p>Submitter Information</p> <p>Submitter ID: GMICHAEL01</p> <p>*Receiver ID/Name: 87654321-CMds</p>

Step	Screenshot
<p>9. The <b>Submitter ID</b> and the <b>Receiver ID/Name</b> fields are automatically populated by the system.</p> <p>The <b>Submitter ID</b> is the Medicaid ID of the entity submitting the claim.</p> <p>The <b>Receiver ID/Name</b> field identifies the entity receiving the submitted claim.</p>	 <p>The screenshot shows the 'Basic Claim Info' tab selected. Under the heading 'Is this a Void/Replacement?', the 'No' radio button is selected. Below this, the 'Submitter Information' section contains two fields: 'Submitter ID' with the value '81730984' and 'Receiver ID/Name' with a dropdown menu showing '87654321-CMds'. A red rectangular box highlights these two fields.</p>
<p>10. Complete the required fields on the <b>Basic Claim Info</b> tab. Those fields have a red asterisk (*).</p>	 <p>The screenshot shows the 'Basic Claim Info' tab with several sections. The 'Submitter Information' section has 'Submitter ID' (GMICHAEL01) and '*Receiver ID/Name' (87654321-CMDS). Below it is the 'Provider Information' section with a note to go to the 'Other Claim Info' tab for other providers, and dropdowns for 'Billing Provider' and 'Rendering(Performing) Provider'. At the bottom is the 'Member Information' section with a dropdown for 'Member'.</p>

Step	Screenshot
<p>11. Complete the required fields on the <b>Other Claim Info</b> tab if applicable.</p>	
<p>12. The <b>Other Service Line Info</b> tab will display the basic line item information added on the <b>Basic Claim Info</b> tab. The line item cannot be edited, but additional information can be added by selecting the line item row. There are additional panels that can be expanded to add additional information and then select the <b>Update</b> button once complete.</p>	

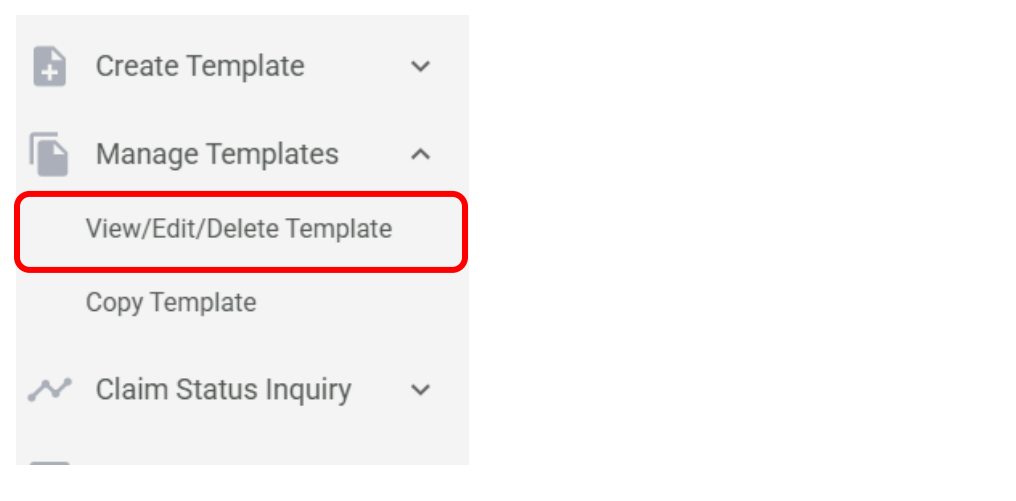
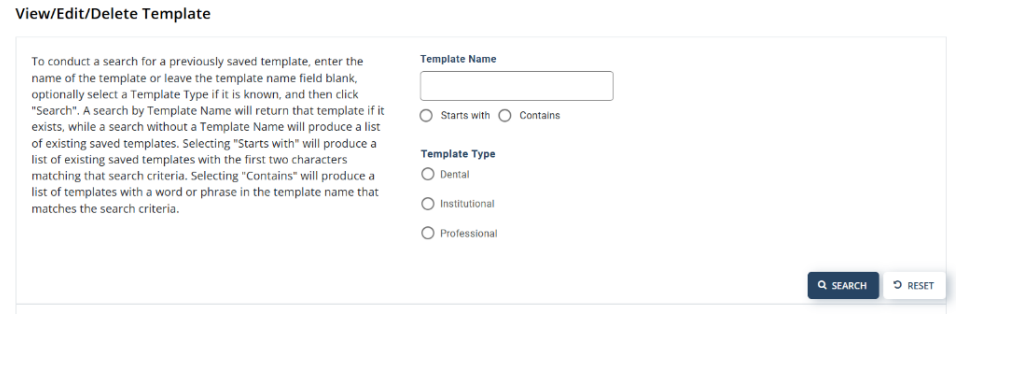
Step	Screenshot
13. Select the <b>Save Template</b> button.	

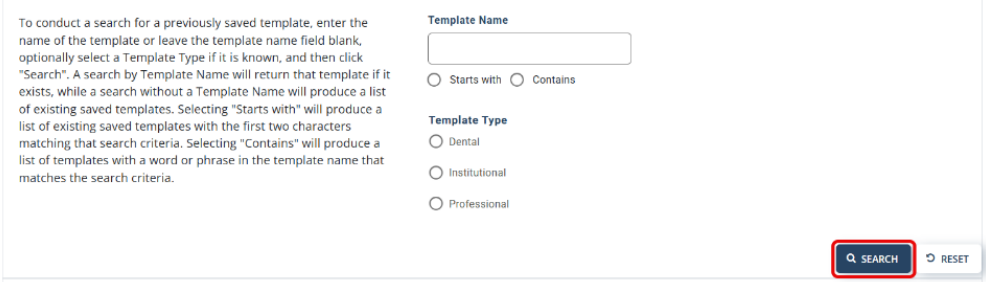
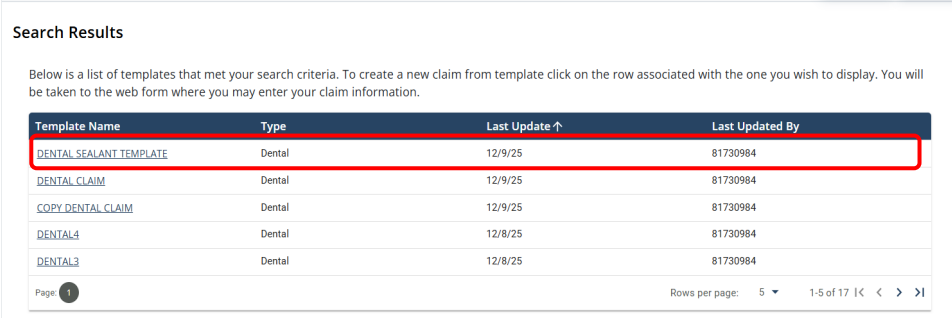
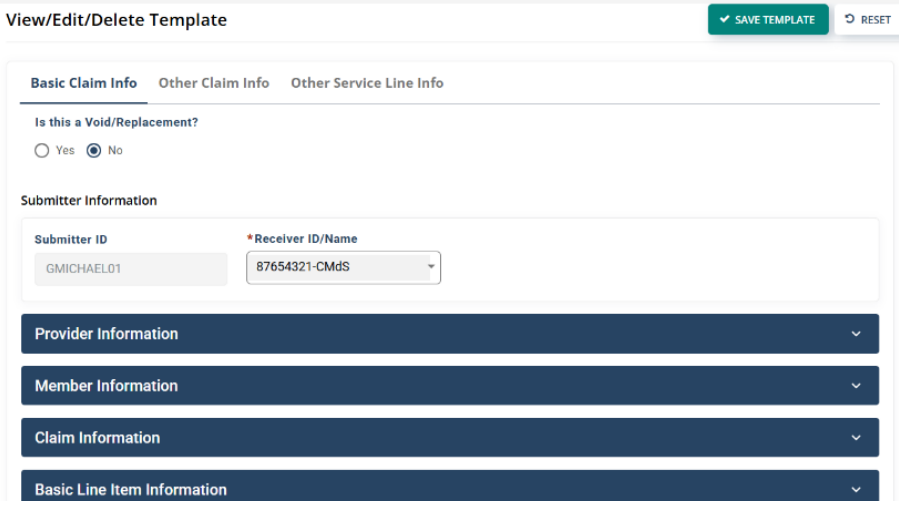
### 3 Managing Templates

The system allows users to view, edit, and delete existing claim templates.

#### 3.1 View Existing Template

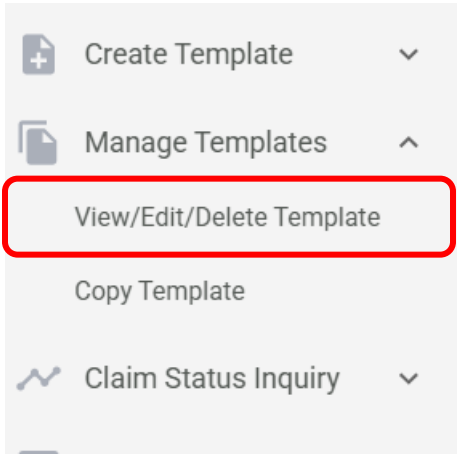
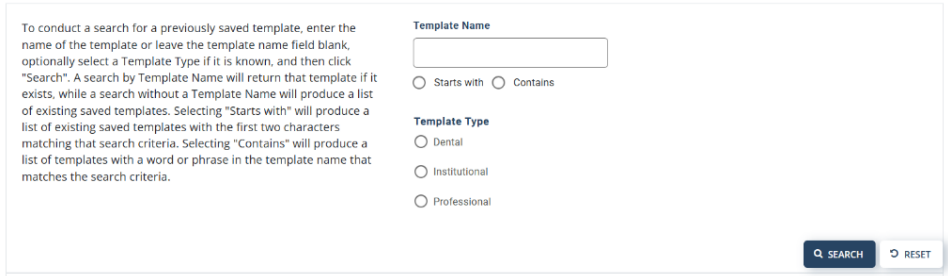
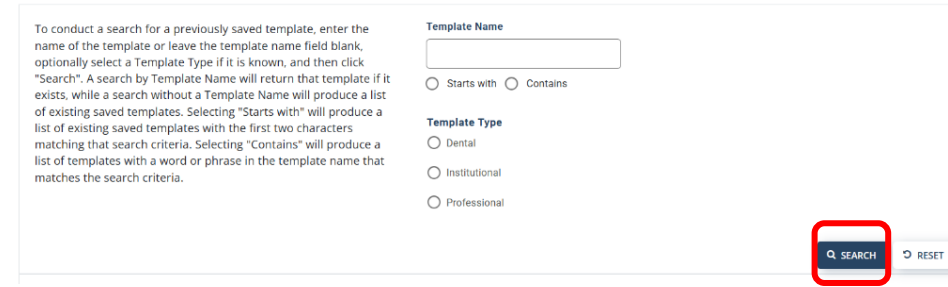
The system allows users to view all existing claim templates. To do this, complete the following steps:

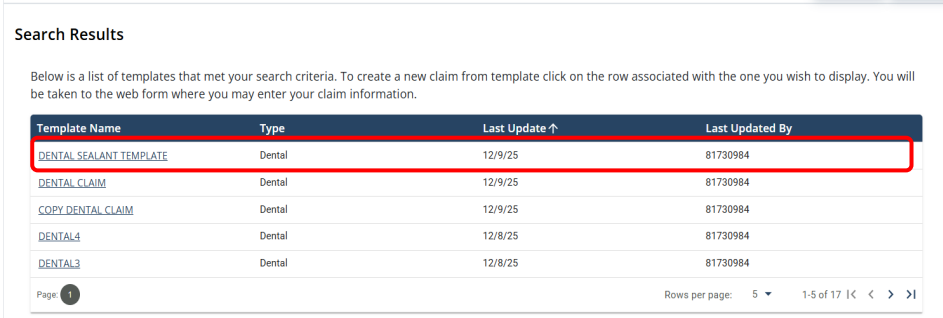
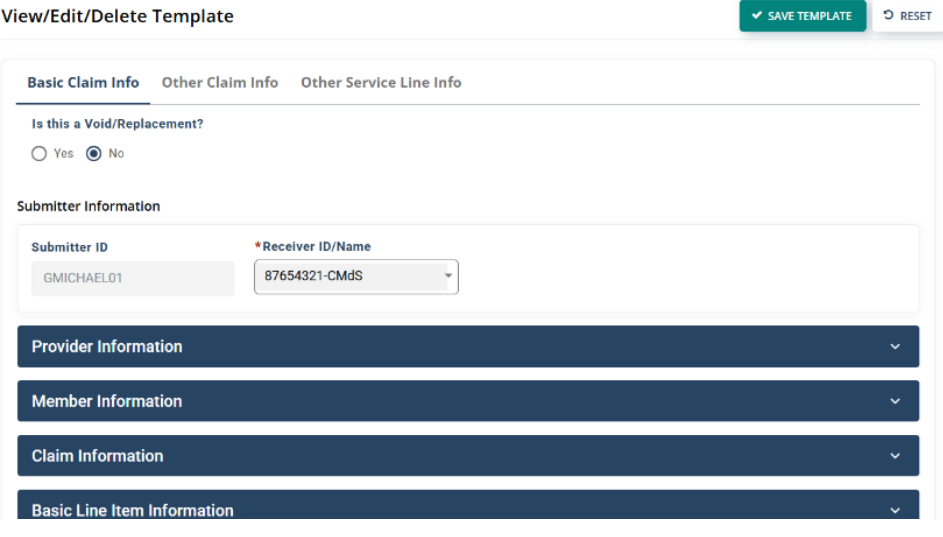
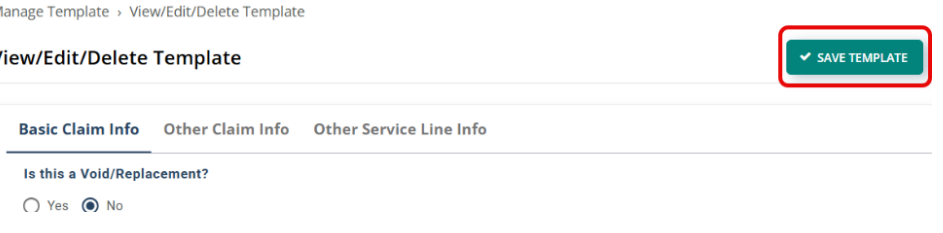
Step	Screenshot
1. From the <b>Manage Templates</b> menu, select <b>View/Edit/Delete Template</b> .	
2. On the <b>View/Edit/Delete Template</b> page, enter your search criteria. You can search by <b>Template Name</b> or <b>Template Type</b> .	

Step	Screenshot																								
<p>3. Select the <b>Search</b> button.</p>	 <p><b>View/Edit/Delete Template</b></p> <p>To conduct a search for a previously saved template, enter the name of the template or leave the template name field blank, optionally select a Template Type if it is known, and then click "Search". A search by Template Name will return that template if it exists, while a search without a Template Name will produce a list of existing saved templates. Selecting "Starts with" will produce a list of existing saved templates with the first two characters matching that search criteria. Selecting "Contains" will produce a list of templates with a word or phrase in the template name that matches the search criteria.</p> <p>Template Name <input type="text"/></p> <p><input type="radio"/> Starts with <input type="radio"/> Contains</p> <p>Template Type</p> <p><input type="radio"/> Dental</p> <p><input type="radio"/> Institutional</p> <p><input type="radio"/> Professional</p> <p><b>SEARCH</b> <b>RESET</b></p>																								
<p>4. A list of results matching your search criteria will be displayed. When only one template is created, the system automatically navigates to the claims page. However, if multiple templates exist, the user is prompted to select from the available options before proceeding.</p>	 <p><b>Search Results</b></p> <p>Below is a list of templates that met your search criteria. To create a new claim from template click on the row associated with the one you wish to display. You will be taken to the web form where you may enter your claim information.</p> <table border="1"> <thead> <tr> <th>Template Name</th> <th>Type</th> <th>Last Update ↑</th> <th>Last Updated By</th> </tr> </thead> <tbody> <tr> <td><a href="#">DENTAL_SEALANT_TEMPLATE</a></td> <td>Dental</td> <td>12/9/25</td> <td>81730984</td> </tr> <tr> <td><a href="#">DENTAL_CLAIM</a></td> <td>Dental</td> <td>12/9/25</td> <td>81730984</td> </tr> <tr> <td><a href="#">COPY_DENTAL_CLAIM</a></td> <td>Dental</td> <td>12/9/25</td> <td>81730984</td> </tr> <tr> <td><a href="#">DENTAL4</a></td> <td>Dental</td> <td>12/8/25</td> <td>81730984</td> </tr> <tr> <td><a href="#">DENTAL3</a></td> <td>Dental</td> <td>12/8/25</td> <td>81730984</td> </tr> </tbody> </table> <p>Page: 1 Rows per page: 5 1-5 of 17   &lt; &gt; &gt;&gt;</p>	Template Name	Type	Last Update ↑	Last Updated By	<a href="#">DENTAL_SEALANT_TEMPLATE</a>	Dental	12/9/25	81730984	<a href="#">DENTAL_CLAIM</a>	Dental	12/9/25	81730984	<a href="#">COPY_DENTAL_CLAIM</a>	Dental	12/9/25	81730984	<a href="#">DENTAL4</a>	Dental	12/8/25	81730984	<a href="#">DENTAL3</a>	Dental	12/8/25	81730984
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<p>5. The selected template will be displayed on the screen.</p>	 <p><b>View/Edit/Delete Template</b> <b>SAVE TEMPLATE</b> <b>RESET</b></p> <p>Basic Claim Info Other Claim Info Other Service Line Info</p> <p>Is this a Void/Replacement?</p> <p><input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p>Submitter Information</p> <p>Submitter ID: GMICHAEL01 *Receiver ID/Name: 87654321-CMds</p> <p>Provider Information</p> <p>Member Information</p> <p>Claim Information</p> <p>Basic Line Item Information</p>																								

### 3.2 Edit Existing Template

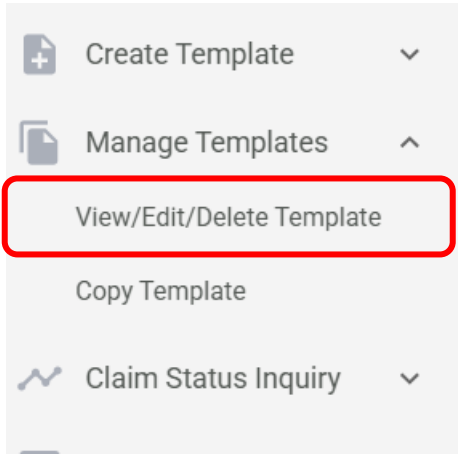
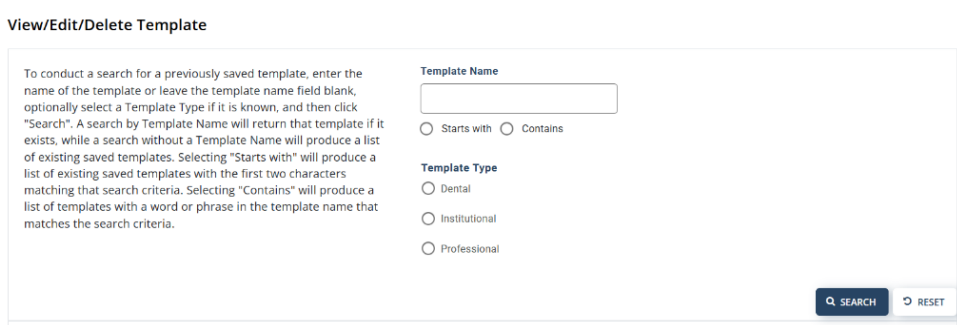
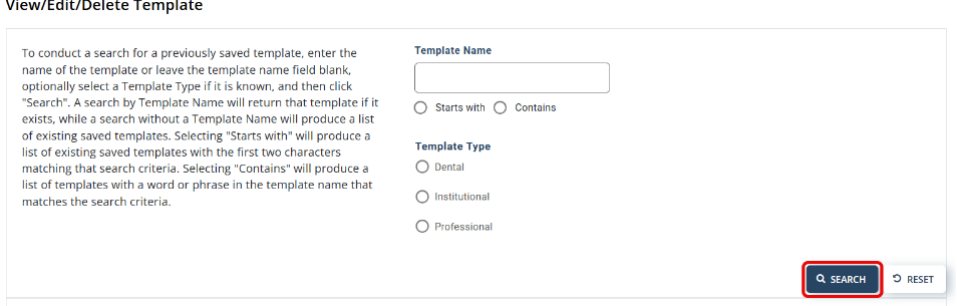
The system allows users to edit existing claim templates. To do this, complete the following steps:

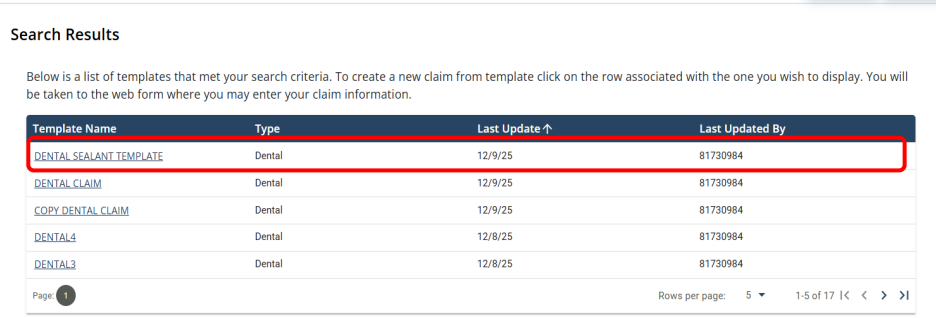

Step	Screenshot
<p>1. From the <b>Manage Templates</b> menu, select <b>View/Edit/Delete Template</b>.</p>	
<p>2. On the <b>View/Edit/Delete Template</b> page, enter your search criteria by entering the <b>Template Name</b> or <b>Template Type</b>.</p>	
<p>3. Select the <b>Search</b> button.</p>	

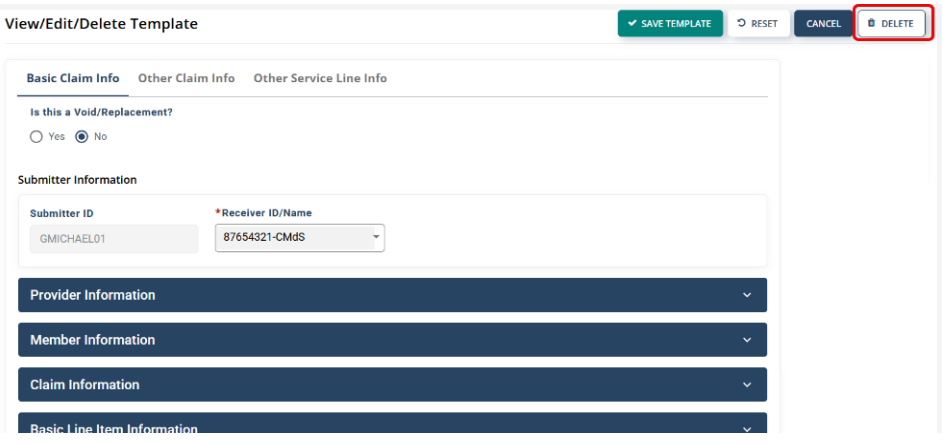
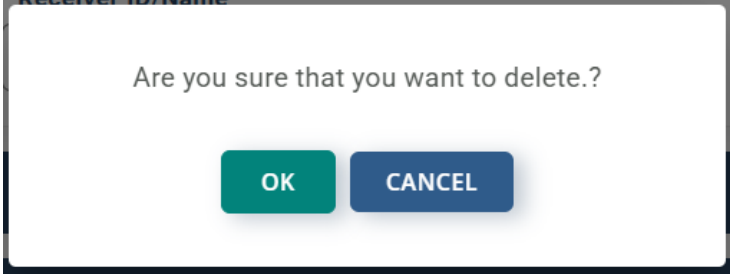
Step	Screenshot																								
<p>4. A list of results matching your search criteria will be displayed. When only one template is created, the system automatically navigates to the claims page. However, if multiple templates exist, the user is prompted to select from the available options before proceeding.</p>	 <p><b>Search Results</b></p> <p>Below is a list of templates that met your search criteria. To create a new claim from template click on the row associated with the one you wish to display. You will be taken to the web form where you may enter your claim information.</p> <table border="1"> <thead> <tr> <th>Template Name</th> <th>Type</th> <th>Last Update ↑</th> <th>Last Updated By</th> </tr> </thead> <tbody> <tr> <td><a href="#">DENTAL SEALANT TEMPLATE</a></td> <td>Dental</td> <td>12/9/25</td> <td>81730984</td> </tr> <tr> <td><a href="#">DENTAL CLAIM</a></td> <td>Dental</td> <td>12/9/25</td> <td>81730984</td> </tr> <tr> <td><a href="#">COPY DENTAL CLAIM</a></td> <td>Dental</td> <td>12/9/25</td> <td>81730984</td> </tr> <tr> <td><a href="#">DENTAL4</a></td> <td>Dental</td> <td>12/8/25</td> <td>81730984</td> </tr> <tr> <td><a href="#">DENTAL3</a></td> <td>Dental</td> <td>12/8/25</td> <td>81730984</td> </tr> </tbody> </table> <p>Page: 1 Rows per page: 5 1-5 of 17   &lt; &gt; &gt;&gt;</p>	Template Name	Type	Last Update ↑	Last Updated By	<a href="#">DENTAL SEALANT TEMPLATE</a>	Dental	12/9/25	81730984	<a href="#">DENTAL CLAIM</a>	Dental	12/9/25	81730984	<a href="#">COPY DENTAL CLAIM</a>	Dental	12/9/25	81730984	<a href="#">DENTAL4</a>	Dental	12/8/25	81730984	<a href="#">DENTAL3</a>	Dental	12/8/25	81730984
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<p>5. The selected template will be displayed on the screen.</p>	 <p><b>View/Edit/Delete Template</b> <span>SAVE TEMPLATE</span> <span>RESET</span></p> <p><b>Basic Claim Info</b> Other Claim Info Other Service Line Info</p> <p>Is this a Void/Replacement?  <input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p><b>Submitter Information</b></p> <p>Submitter ID: GMICHAEL01 *Receiver ID/Name: 87654321-CMds</p> <p>Provider Information</p> <p>Member Information</p> <p>Claim Information</p> <p>Basic Line Item Information</p>																								
<p>6. Make all desired changes to the template and then select the <b>Save Template</b> button to save the changes.</p>	 <p>Manage Template &gt; View/Edit/Delete Template</p> <p><b>View/Edit/Delete Template</b> <span>SAVE TEMPLATE</span></p> <p><b>Basic Claim Info</b> Other Claim Info Other Service Line Info</p> <p>Is this a Void/Replacement?  <input type="radio"/> Yes <input checked="" type="radio"/> No</p>																								

### 3.3 Delete Existing Template

The system allows users to delete outdated or unused claim templates. To do this, complete the following steps:

Step	Screenshot
<p>1. From the <b>Manage Templates</b> menu, select <b>View/Edit/Delete Template</b>.</p>	
<p>2. On the <b>View/Edit/Delete Template</b> page, enter your search criteria by entering either the <b>Template Name</b> or <b>Template Type</b>.</p>	
<p>3. Select the <b>Search</b> button.</p>	

Step	Screenshot																								
<p>4. A list of results matching your search criteria will be displayed. When only one template is created, the system automatically navigates to the claims page. However, if multiple templates exist, the user is prompted to select from the available options before proceeding.</p>	 <p><b>Search Results</b></p> <p>Below is a list of templates that met your search criteria. To create a new claim from template click on the row associated with the one you wish to display. You will be taken to the web form where you may enter your claim information.</p> <table border="1"> <thead> <tr> <th>Template Name</th> <th>Type</th> <th>Last Update ↑</th> <th>Last Updated By</th> </tr> </thead> <tbody> <tr> <td>DENTAL SEALANT TEMPLATE</td> <td>Dental</td> <td>12/9/25</td> <td>81730984</td> </tr> <tr> <td>DENTAL CLAIM</td> <td>Dental</td> <td>12/9/25</td> <td>81730984</td> </tr> <tr> <td>COPY DENTAL CLAIM</td> <td>Dental</td> <td>12/9/25</td> <td>81730984</td> </tr> <tr> <td>DENTAL4</td> <td>Dental</td> <td>12/8/25</td> <td>81730984</td> </tr> <tr> <td>DENTAL3</td> <td>Dental</td> <td>12/8/25</td> <td>81730984</td> </tr> </tbody> </table> <p>Page: 1 Rows per page: 5 1-5 of 17 &lt; &gt; &gt;&gt;</p>	Template Name	Type	Last Update ↑	Last Updated By	DENTAL SEALANT TEMPLATE	Dental	12/9/25	81730984	DENTAL CLAIM	Dental	12/9/25	81730984	COPY DENTAL CLAIM	Dental	12/9/25	81730984	DENTAL4	Dental	12/8/25	81730984	DENTAL3	Dental	12/8/25	81730984
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<p>5. The selected template will be displayed on the screen.</p>	 <p><b>View/Edit/Delete Template</b> <span>SAVE TEMPLATE</span> <span>RESET</span></p> <p><b>Basic Claim Info</b> Other Claim Info Other Service Line Info</p> <p>Is this a Void/Replacement?  <input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p><b>Submitter Information</b></p> <p>Submitter ID: GMICHAEL01 Receiver ID/Name: 87654321-CMdS</p> <p>Provider Information</p> <p>Member Information</p> <p>Claim Information</p> <p>Basic Line Item Information</p>																								

Step	Screenshot
<p>6. Select the <b>Delete</b> button to initiate the deletion of the template.</p>	 <p>The screenshot shows a web interface titled "View/Edit/Delete Template". At the top right, there are four buttons: "SAVE TEMPLATE" (green), "RESET" (grey), "CANCEL" (dark blue), and "DELETE" (dark blue with a trash icon, highlighted with a red box). Below the buttons are tabs for "Basic Claim Info", "Other Claim Info", and "Other Service Line Info". A section titled "Is this a Void/Replacement?" has radio buttons for "Yes" and "No", with "No" selected. Under "Submitter Information", there are two dropdown menus: "Submitter ID" (showing "GMICHAEL01") and "Receiver ID/Name" (showing "87654321-CMds"). At the bottom, there are several expandable sections: "Provider Information", "Member Information", "Claim Information", and "Basic Line Item Information".</p>
<p>7. The system will display a message asking, <i>“Are you sure you want to delete?”</i>.</p> <p>To continue with the deletion of the template, select the <b>OK</b> button. To cancel deletion of the template, select the <b>CANCEL</b> button.</p>	 <p>The screenshot shows a modal dialog box with a white background and a dark border. The text inside reads "Are you sure that you want to delete?". Below the text are two buttons: a green "OK" button and a dark blue "CANCEL" button.</p>