

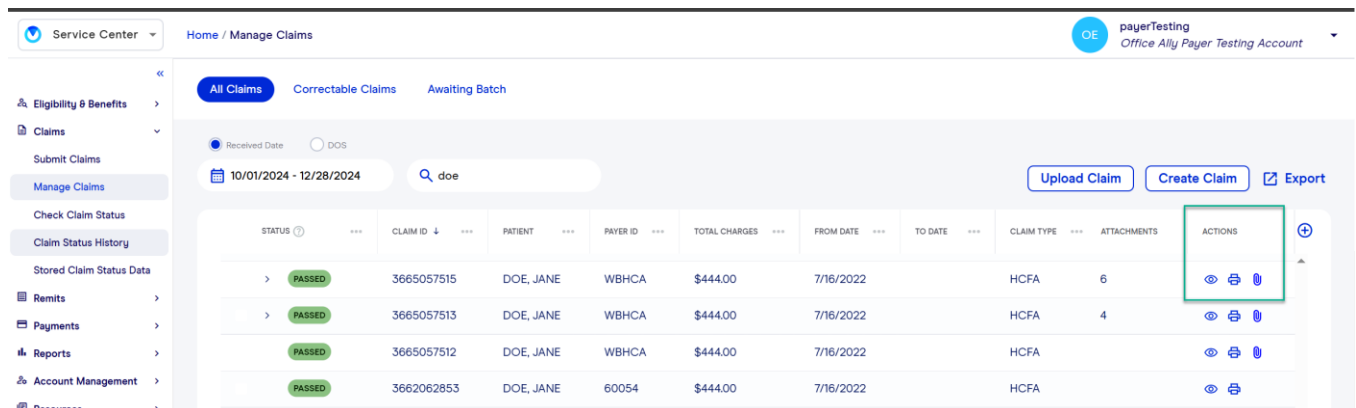
What is it for?

The Attachment Tool (Claim Attachments) is built into the claims workflow. It helps providers upload supporting documents like medical records, lab results, or other required files directly to a claim.

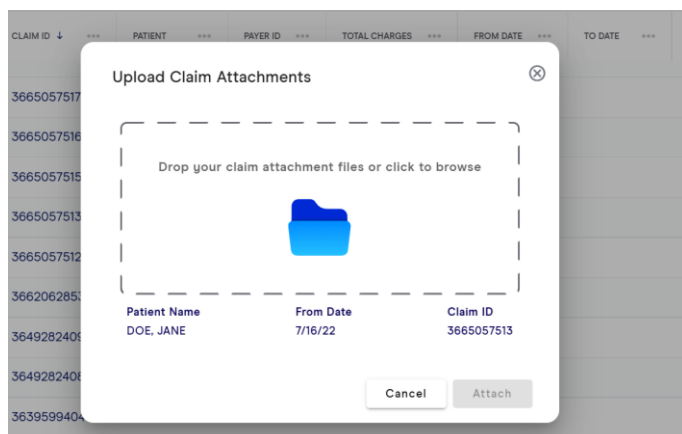
This reduces manual steps, speeds processing, lowers claim rejections, and keeps your document management more organized.

Here's a step by step:

1. **Log in** to the **Service Center**.
2. Navigate to **Claims** → **Manage Claims**.
3. In the **Manage Claims** list, look at the **Actions** column. For those payers that support attachments, you'll see a **paperclip icon** ("Attach Documents").



4. Click on that **paperclip icon**. A pop up window will open.



- **Drag & drop** files or click to browse and select from your computer.

- Choose the appropriate **Attachment Type Code** from the drop-down list.
- Click the **blue “Attach”** button to submit the files.

Upload Claim Attachments

Drop your claim attachment files or click to browse

Patient Name: DOE, JANE From Date: 7/16/22 Claim ID: 3665057513

File Name	Type Code
General Medical Doc Example .pdf	DJ - Discharge Monitoring Report
OM 108.pdf	OB - Operative Note
OM 32.pdf	BS - Baseline
OM 107.pdf	A3 - Allergies/Sensitivities Document

Cancel **Attach**

5. Back in the claims list, look in the **Attachments** column, it will show the number of files attached to each claim.

Service Center Home / Manage Claims payerTesting Office Ally Payer Testing Account

All Claims Correctable Claims Awaiting Batch

Received Date DOI 10/01/2024 - 12/28/2024 Search: doe Upload Claim Create Claim Export

STATUS	CLAIM ID	PATIENT	PAYER ID	TOTAL CHARGES	FROM DATE	TO DATE	CLAIM TYPE	ATTACHMENTS	ACTIONS
PASSED	3665057513	DOE, JANE	WBHCA	\$444.00	7/16/2022		HCFA	4	View Download Delete
PASSED	3665057512	DOE, JANE	WBHCA	\$444.00	7/16/2022		HCFA		View Download Delete
PASSED	3662062853	DOE, JANE	60054	\$444.00	7/16/2022		HCFA		View Download Delete

6. To see more details about attachments:

- Click the **arrow** next to the **Status** column for that claim. You'll see status, upload date, attachment ID (downloadable), and the type code.

Service Center

Home / Manage Claims

payerTesting

Office Ally Payer Testing Account

Eligibility & Benefits

Claims

Submit Claims

Manage Claims

Check Claim Status

Claim Status History

Stored Claim Status Data

Remits

Payments

Reports

Account Management

Resources

All Claims

Correctable Claims

Awaiting Batch

Received Date

DOI

10/01/2024 - 12/28/2024

doe

Upload Claim

Create Claim

Export

STATUS	CLAIM ID	PATIENT	PAYER ID	TOTAL CHARGES	FROM DATE	TO DATE	CLAIM TYPE	ATTACHMENTS	ACTIONS
PASSED	3665057513	DOE, JANE	WBHCA	\$444.00	7/16/2022		HCFA	4	
STATUS	UPLOAD DATE		ATTACHMENT ID				TYPE CODE		
Viewed	3/27/2025		10297103				DJ		
Viewed	3/27/2025		10297104				OB		
Viewed	3/27/2025		10297105				BS		
Viewed	3/27/2025		10297106				A3		

Q: When will I see the paperclip icon?

A: The paperclip icon appears in the Actions column only for payers that support attachments. Hovering over it displays “Add Attachment.”

Q: What does the upload window show?

A: The upload modal displays key claim details such as patient name, date of service, and claim ID to help you confirm you’re attaching to the right claim.

Q: Which file types can I upload?

A: You can upload PDF, TIF, or TIFF files.

Q: How many files am I allowed per claim?

A: You may attach up to 10 files to a single claim.

Q: Do I need to choose a type code?

A: Yes, before attaching files you must select an Attachment Type Code from the dropdown.

Q: Are there file size or format restrictions?

A: Yes. Files larger than 10 MB or in unsupported formats will be blocked. You’ll see an error message explaining the problem.

Q: Can I remove a file before submitting?

A: Yes. In the upload window, click the “X” next to a file to remove it before attaching.

Q: How do I see how many files are attached to a claim?

A: The Attachments column in the claims grid shows the number of files currently attached to each claim.

Q: How do I view details about each attachment?

A: Click the down arrow next to the Status column for that claim. You’ll see the status, upload date, attachment ID (which you can download), and the type code.

Q: How will I know if the upload succeeded?

A: After clicking "Attach," you’ll see a message in green for success or red for an error, with information about what went wrong.