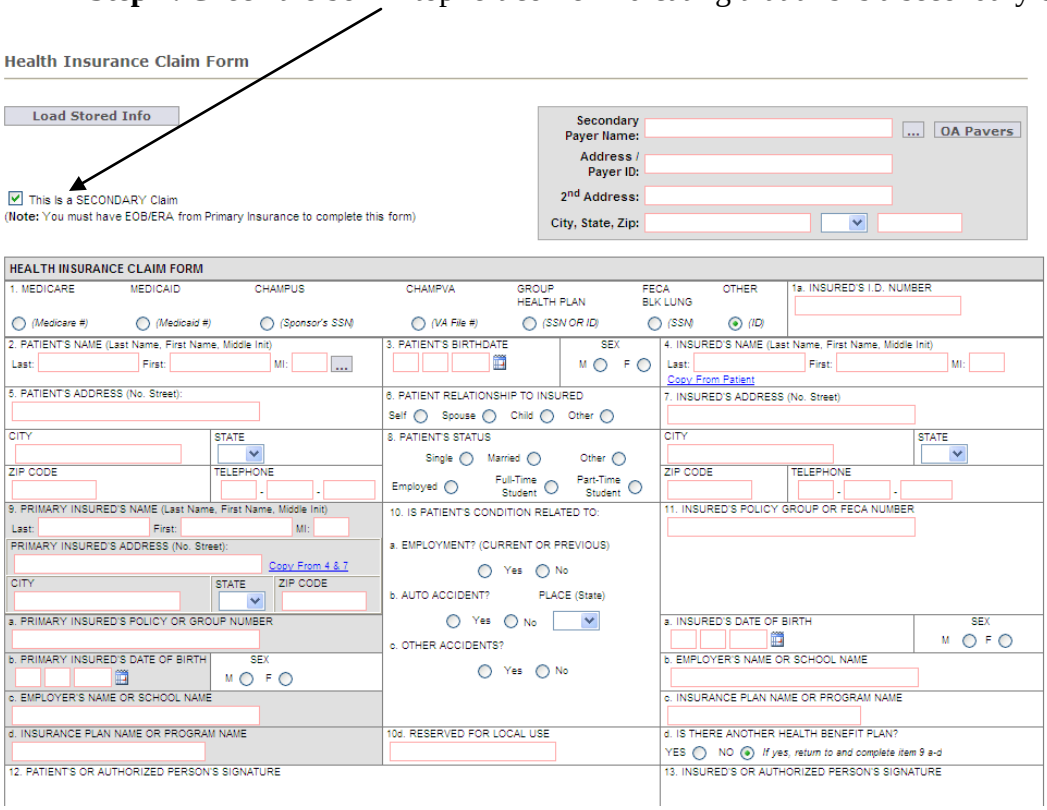
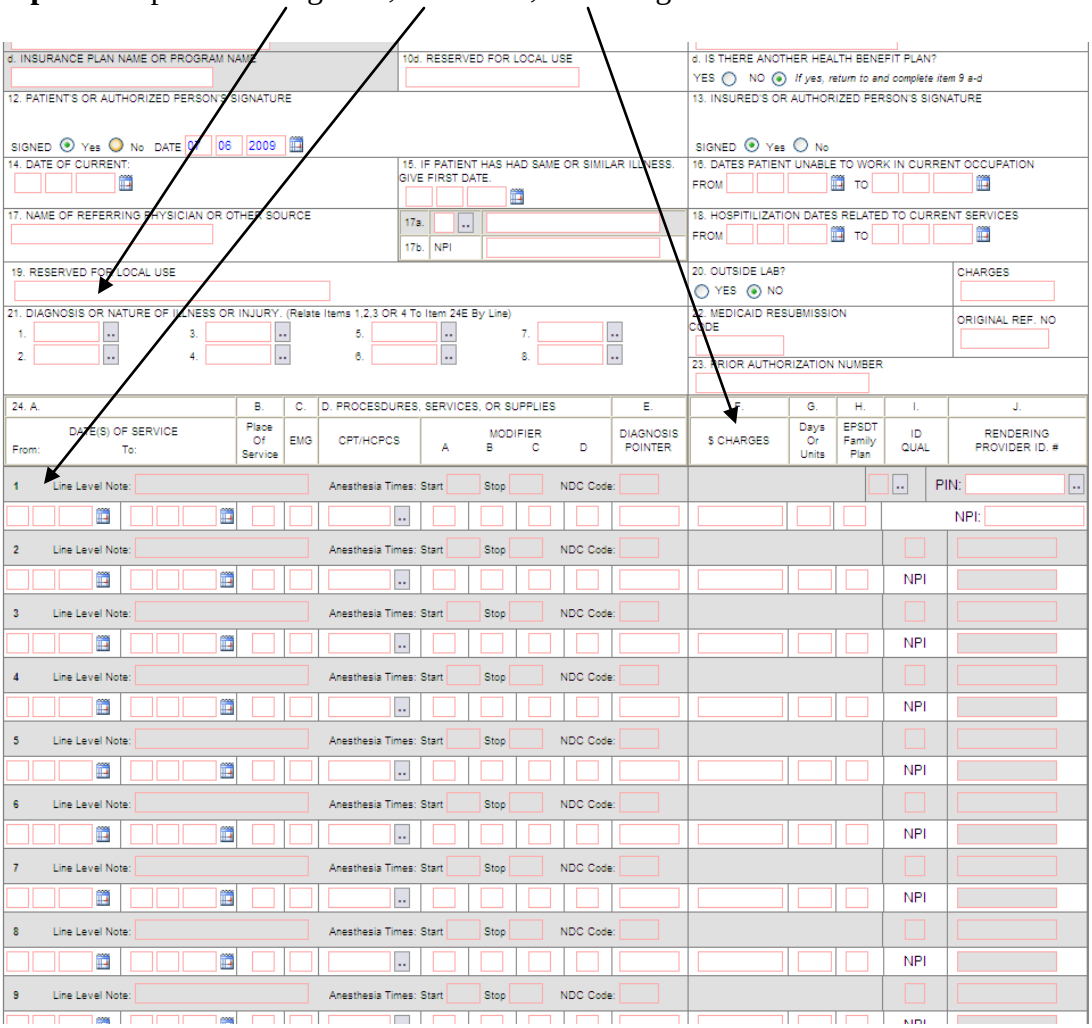
Instructions for submitting a secondary claim with Coordination of Benefits (COB) information using Office Ally

Step 1. Check the box in top left corner indicating that this is a secondary claim.

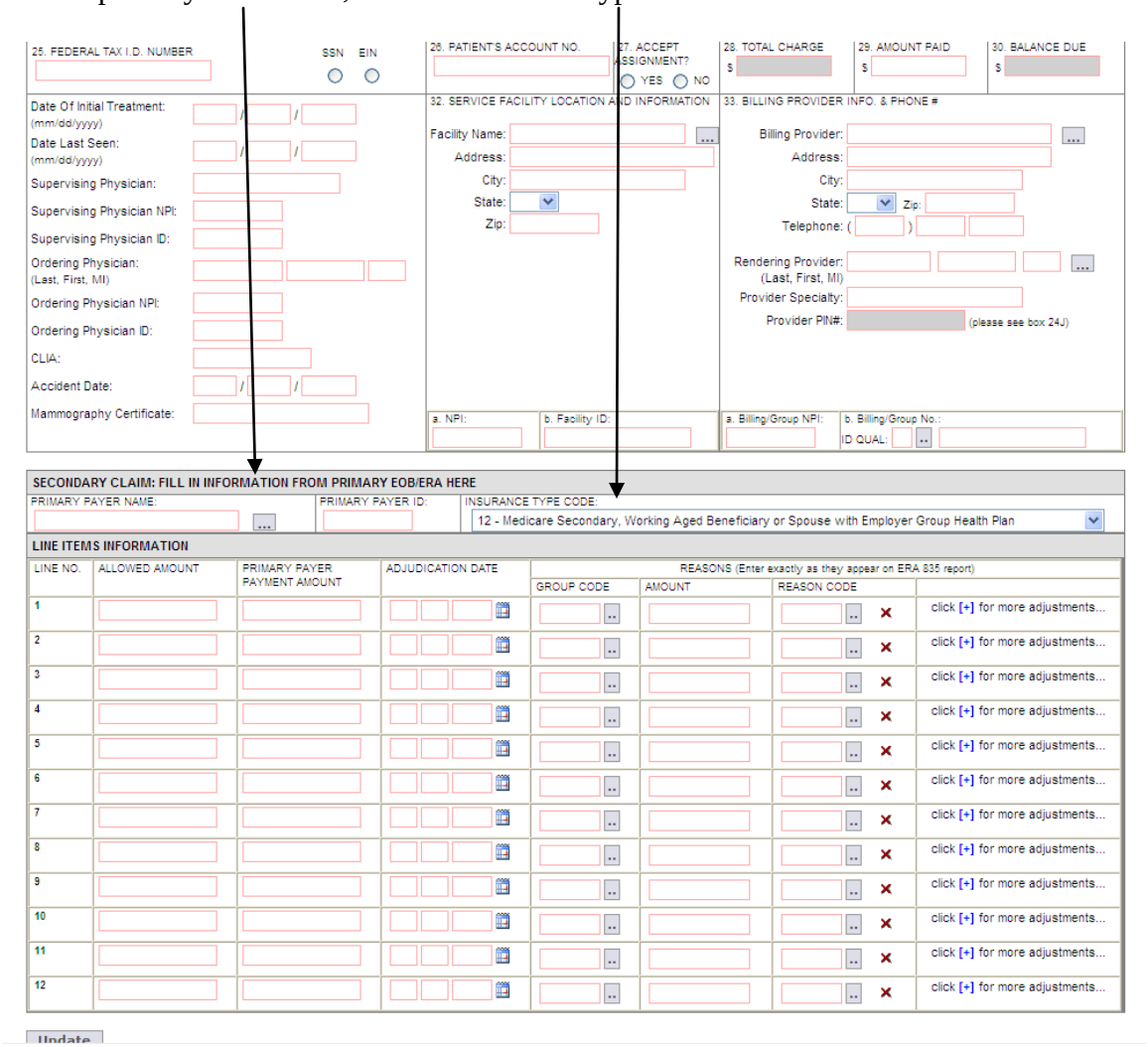


Step 2. Complete all required fields and input stored information, including primary insurance information, in fields 9, 9a, 9b, 9c, 9d, and 11d.

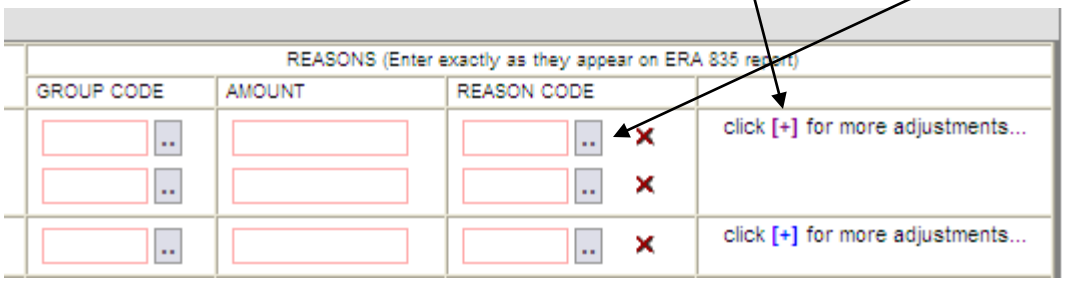
Step 3. Complete the diagnosis, line items, and charges fields.



Step 4. Complete the lower section with information from the primary EOB/ERA. If Medicare is not the primary EOB/ERA, leave "Insurance Type Code" as "select one."



Tip: If the primary insurance has an adjustment amount and a patient responsibility amount, you will need to click the plus sign to list more than one reason code field. Use the grey dotted boxes to bring up drop-down menus of code choices.



Step 5. When all information is complete, click *update* to submit the form.