

# Using ERA with Helper 7.1

## Introduction to ERA

Helper allows you to submit claims electronically using VantageMed's SecureConnect®. Now you can also receive and post Electronic Remittance Advice (ERA) using Helper's ERA processing feature that works with SecureConnect. You can use the ERA Payer Id field to identify payers for electronic claims and also set up patient-specific ERA settings on the ERA tab in the Facesheet Default option. New ERAs are sent through SecureConnect to the ERA ledger in Helper.

## Getting Started with ERA

To get started with ERA, you need

- First, sign up for ERA with your provider.
- Set up your user security setting for ERA
- Then, enter the ERA Payer ID in the Insurance Company Library.
- Next, set up your ERA preferences to control how ERA over and under payments are handled on a patient-by-patient basis.
- Finally, process your claims through SecureConnect.

### *Sign up for ERA with your provider*

1. Locate the payers offering ERA. The list of payers that offer ERA is available at [www.emdeon.com/PayerLists/payerlists.php](http://www.emdeon.com/PayerLists/payerlists.php) under the *Medical - Hospital Claims and ERA* section.
2. Review the list and determine if your payer offers ERA. Look for ERA in the service column of the list.
3. Contact the Helper SecureConnect EDI team and request the ERA paperwork for the payer by sending an email to [helper.enroll@vantagemed.com](mailto:helper.enroll@vantagemed.com). For technical support, call **781-937-0080** or visit <http://support.helper.com>.

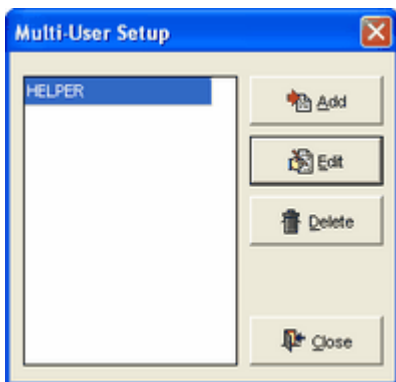
### *Set up your user security settings for ERA*

In order to use ERA successfully, your user security settings must have the proper rights set up for ERA.

**Note:** You must have Administrator Access to change your user security rights.

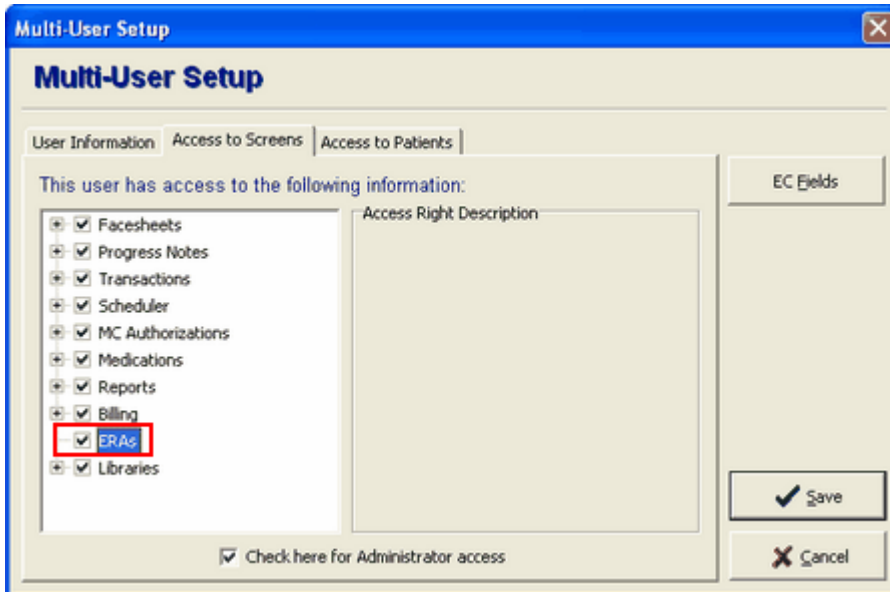
To set up your user rights, do the following:

1. Select **Setup | Multi-User Setup** from Helper's main screen. The Multi-User Setup screen displays:



2. Click **Add** if you are adding a new user or **Edit** to edit a current user.
3. If you are adding a user, fill in the user name and enter passwords if desired.
4. Select the **Access to Screens** tab.

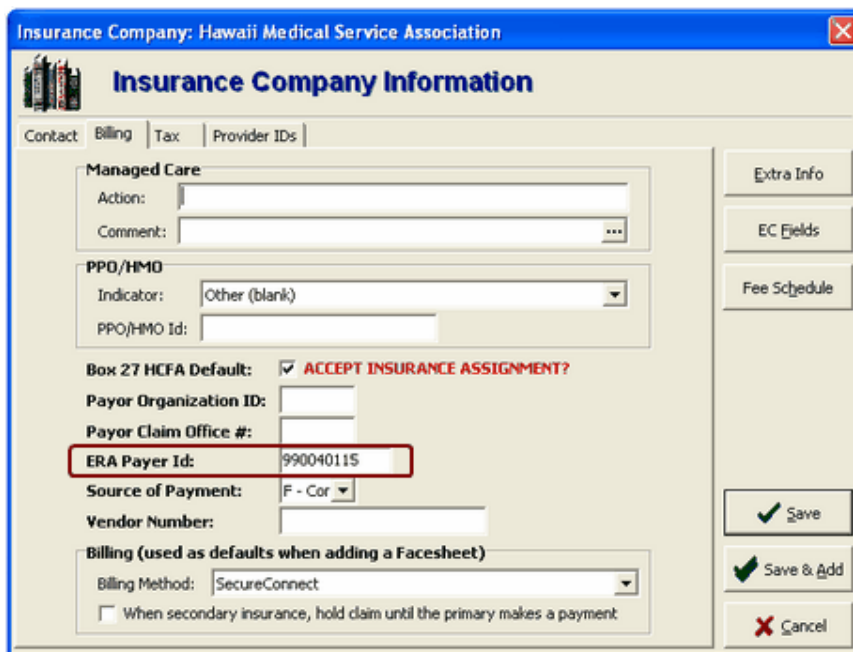
- Make sure the **ERAs** check box is checked. (If you are installing Helper Software for the first time or adding a new user, this box will be checked by default.)



- Click **Save** to save your settings.

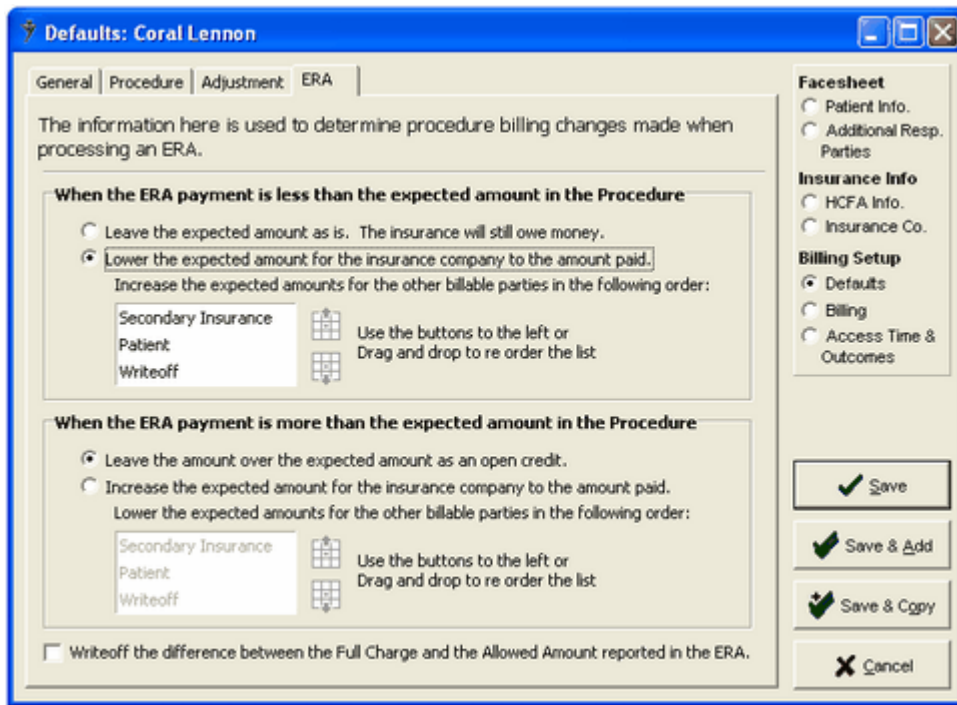
### Enter the Payer ID in the Insurance Company Library

Enter the ERA Payer Id in the Insurance Company Library Billing tab (**Setup | Libraries | Insurance Companies**). In many cases, this value will be the same as the value entered in the Payor Organization ID field.



### Set up Facesheet ERA defaults

(Optional) You can set up ERA preferences on the ERA tab in individual patient facesheets. These options control how over and under ERA payments are handled on a patient-by-patient basis. These options are automatically applied when you process a payment from the ERA Ledger.



Click the **ERA** tab on the patient facesheet and select from these options:

- If the ERA payment is **less** than the expected amount for the procedure:
  - Click the **Leave the expected amount as is** radio button. The insurance company will owe money on the procedure.
  - OR
  - Click the **Lower the expected amount for the insurance company to the amount paid** radio button. Then increase the expected amounts for the other billable parties by selecting the order in which you want other responsible party amounts to be increased. This allows you to increase the amount owed by the secondary insurance if the primary paid less than expected or increase the amount owed by the patient.
- If the ERA payment is **more** than the expected amount in the procedure:
  - Click the **Leave the amount over the expected amount as an open credit** radio button. The insurance company will have an open credit.
  - OR
  - Click the **Increase the expected amount for the insurance company to the amount paid** radio button, and then select the order of expected amounts for the responsible parties. This allows you to accept the larger payment and decrease the amount owed by the secondary insurance or the patient, based on the order selected.
- Select the **Write off the difference between the Full Charge and the Allowed Amount reported in the ERA** check box to automatically write off this amount.

**Note:** Not all ERAs will contain Allowed Amount information.

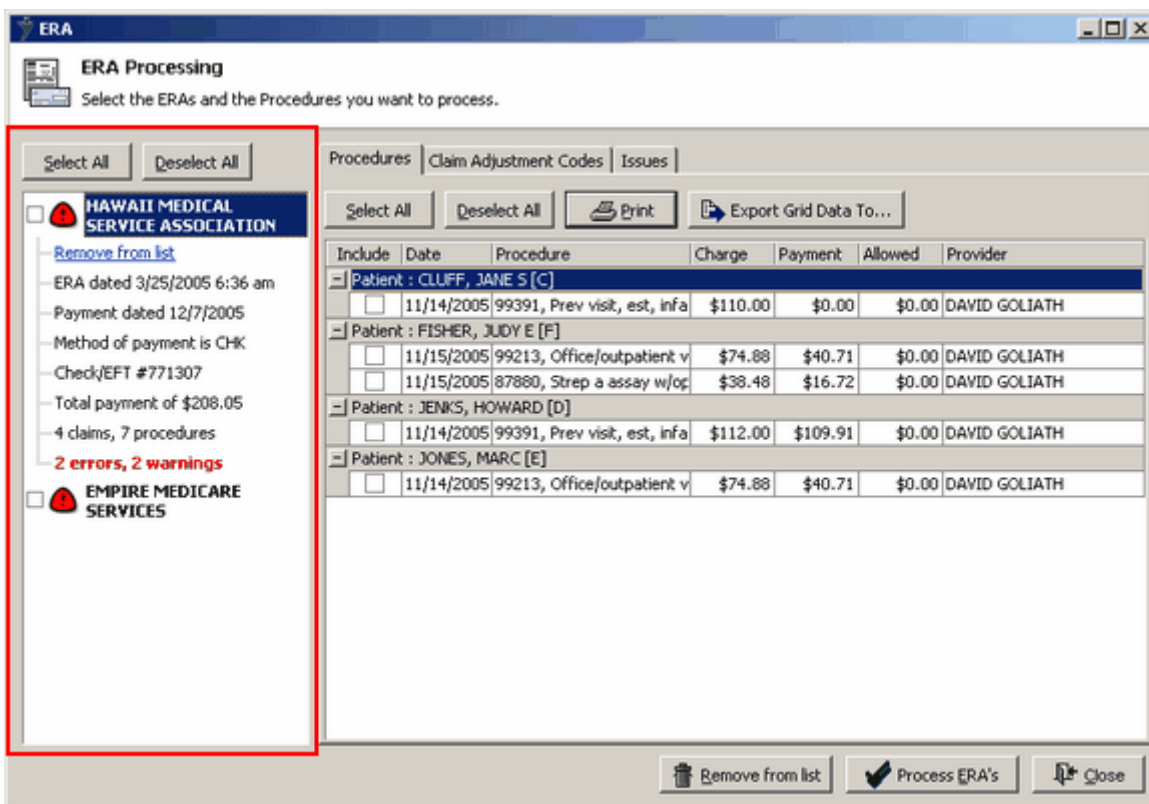
## The ERA Processing Screen

The ERA Processing screen is divided into two panels containing lists. The left panel lists all of the active ERA files. The panel on the right lists all of the transactions associated to those ERA files and contains three tabs: Procedures, Claim Adjustment Codes, and Issues.

### The Left ERA Panel

The left ERA panel lists:

- The payer
- The date of the ERA
- The Check/EFT number
- The total payments
- The total number of claims and procedures
- The errors and warnings



You have the following options:

**Important!** Use caution when selecting which ERA to remove. Removing an ERA will remove it permanently from processing.

- To remove a single ERA: from the left ERA panel list, select the check box in front of the ERA and click the **Remove from list** button at the bottom of the ERA screen.

- To remove multiple ERAs: from the left ERA list, select the check boxes in front of the ERAs to be removed and click the **Remove From List** button at the bottom of the ERA screen.
- Clicking on the bolded ERA payer name in the list on the left panel will expand the information under the ERA.

**Note:** To process transactions on the right you must also check an ERA box. If you check an ERA box without checking any transactions on the right, it will only process the payment.

### Multiple insurance companies

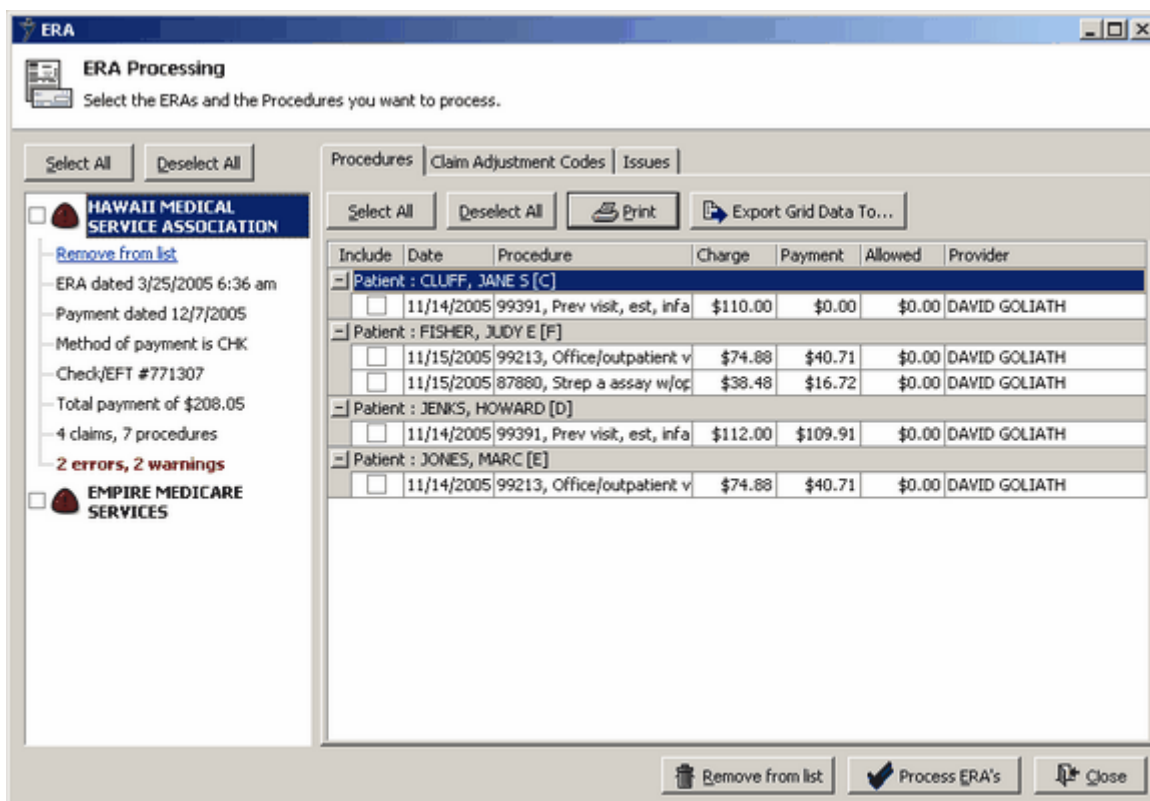
The payer's ERA identifier is assigned in the Insurance Company library on the Billing tab in the ERA Payer Id box. It is possible to have multiple insurance company library entries with the same ERA identifier. If this is the case, a list of companies that have a matching ERA Payer Id will be displayed in the left panel under the ERA payer name on the ERA list. Select the correct insurance company from the list.

### The Right ERA Panel

The right ERA panel has three tabs: Procedures, Claim Adjustments, and Issues.

#### The Procedures Tab

The Procedures tab lists all of the payment transactions associated with the ERA files. You can choose the option to **Select All** or **Deselect All** to quickly check the boxes of the transactions you want to process into the patient's ledger. You can also individually select the transactions to process.

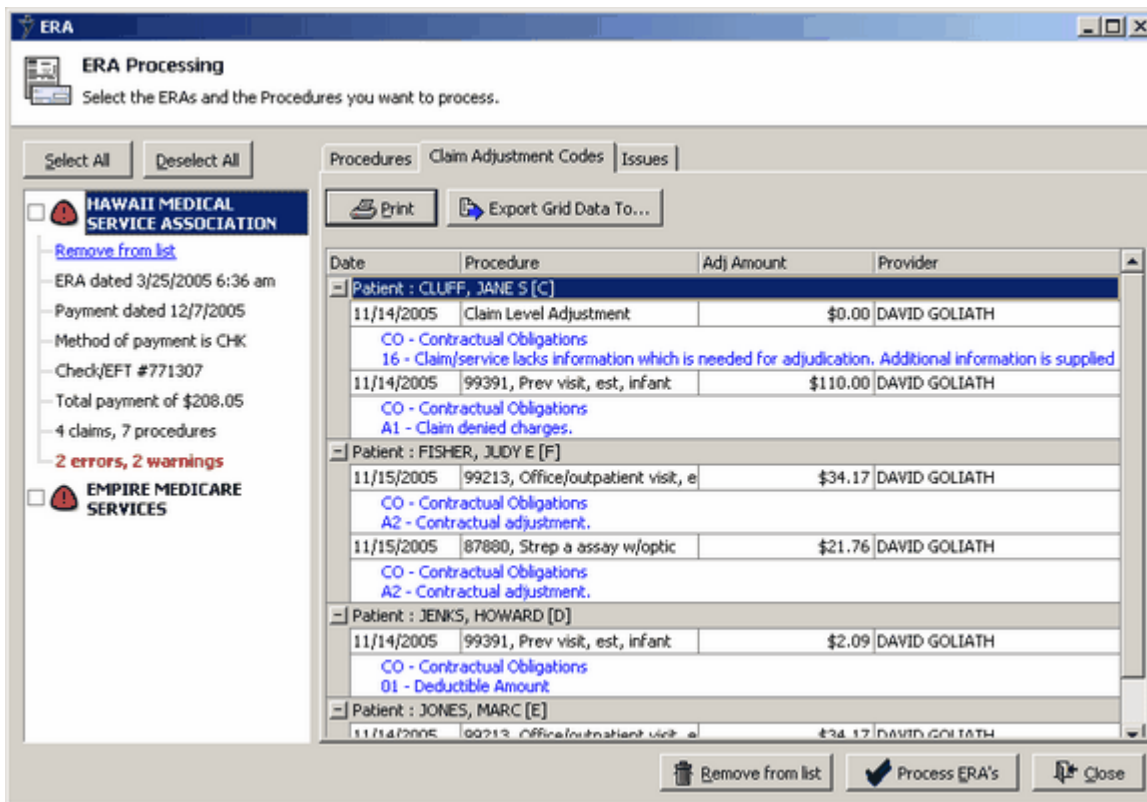


- The Procedures tab is organized by patient. You can reduce or expand the detail shown by clicking on the + or – sign next to the patient's name.
- To print, click the **Print** button at the top of the screen. All of the tabs in the ERA ledger can be printed out for easy review.

- You also have the option to export the grid data by clicking the **Export Grid Data To** button at the top of the screen.

### The Claim Adjustment Codes Tab

The Claim Adjustment Codes tab contains a list of the adjustments contained in the ERA and the associating Claim Adjustment Code (for secondary electronic claims). This tab lists explanations for why the ERA did not pay for certain procedures or why a certain amount was not paid. All of the information that is contained in the Adjustments tab is contained in the ERA and has been provided by the payer.



### The Issues Tab

The Issues tab lists details of any warnings or errors associated with the ERA. A red icon indicates that an error was found that stopped a transaction from being displayed on the Procedures tab; a yellow icon indicates a warning.

You can choose to ignore the warnings and proceed, or close the ERA ledger and fix the cause of the warning. Example: If a payment in the ERA was for an amount that was less or more than the amount expected from the insurance company for the procedure.

### Cases that generate errors

- The payer could not be found. This uses the Payer Id to find a payer.
- The patient could not be found. This uses the patient number to find the patient.
- The patient does not have an insurance company with a matching Payer ID.
- The Provider in the claim could not be found. Helper searches on every ID entered in the Provider Id system, regardless of what type of ID was specified in the ERA.
- A matching procedure could not be found.

### Cases that generate warnings

- \$0.00 was paid for a service.
- If previous payments have already been applied to the service then you get a warning. This could mean you had to resubmit and are getting the remaining money or that you incorrectly applied a previous payment to this procedure.
- The charge amount in the ERA does not match the charge amount of the procedure in Helper.

## Processing ERAs

We recommend correcting as many of the errors and warnings as possible in the ERA Ledger before processing the ERA.

To make sure that you are processing only the payments that you want, make sure that the proper procedures and ERAs are selected. For any ERA that is checked on the list in the left panel, all procedures that are checked on the right hand side will be processed.

1. Send claims through SecureConnect or click the **Send/Receive** button in the SecureConnect Client.

**Note:** ERA messages are downloaded through SecureConnect Client – they cannot be viewed in SecureConnect Client.



2. In Helper, click the **ERA** button on the top of Helper's screen. The SecureConnect login screen appears.
3. You may be asked to enter your SecureConnect user name and password. Enter this information and click **OK**. A "Parsing ERA" screen appears while the ERA messages are loaded from SecureConnect. All ERA messages in SecureConnect that you have not already selected to be removed from the ERA window will display.

**Note:** The SecureConnect login screen may pop up (because Helper is accessing SecureConnect) and ask you for your SecureConnect login. This is because Helper is accessing SecureConnect to retrieve ERA information.

3. Click the **Process ERAs** button on the bottom of the ERA Ledger. A batch payment will be created for each checked ERA.
  - To view the batch payment, close the ERA ledger, click the **Transactions** button on Helper's main screen and select the **Batch Payments** tab. See Applying Batch Payments in the online help for more information.

You do not have to process all of the procedures in an ERA at the same time. If you process the procedures in an ERA over multiple sessions, all of the payments will post into the same batch payment (1 ERA = 1 Batch Payment).

**Note:** For ease of bookkeeping, we recommend processing your ERA on or around the time that you receive the payment associated with the ERA.