

# ClaimsConnect User Guide

Rev Jan 2022

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# Initial ClaimsConnect Setup

## How to install ClaimsConnect

1. The first step is to install ClaimsConnect. Click on the following link and follow the on-screen instructions to install ClaimsConnect.

http://support.helper.com/down/upgrade/action.jsp?file name=SCCUP

2. Enter the information requested and click on Submit Information.



# Upgrade

#### ClaimsConnect Client 6.4

Please enter your Helper account number, the Zip Code associated with your Helper account (you can find it on your last Helper invoice), and your name in the fields below. Then click the "Submit Information" button. If you have any questions, please contact our Sales Department at (800) 343-5737.

Account Number:	
Postal Code:	
First Name:	
Last Name:	
Submit Information	
Return to Upgrades	List
	Site map   Contact us   Privacy policy Copyright © 2022 Netsmart Technologies, All rights reserved.
Netsmart	the leading provider of practice management and electronic health record solutions for

behavioral health, public health, social services, methadone, substance abuse, and population health.

# Upgrade

#### ClaimsConnect Client 6.4

Your account was found in our database. Please click the link below to download the upgrade:

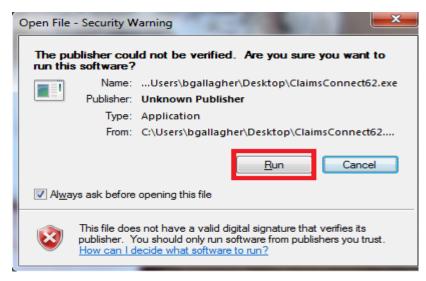
ClaimsConnect Client 6.4

#### Instructions

- 1. Visit the helper.com **Support Page** and read the upgrade installation instructions.
- 2. Click the link above.
- When the file download dialog box appears, click the "Save" button and select a location on your computer to save the file.
- After the download is complete, find the file on your computer and double click it to install the software.
- 5. Follow the on-screen instructions in the installation wizard.
- 3. Click on the link indicated. Choose **Save** from the browser options and save the link to your desktop. On your desktop you will see the following icon.



4. Click on the icon and the ClaimsConnect installation wizard will start.





5. Click on the Next button. The License Agreement will display.



6. Accept the agreement and click Next.

0	Setup - ClaimsConnect
	Select Destination Location Where should ClaimsConnect be installed?
	Setup will install ClaimsConnect into the following folder.
	To continue, click Next. If you would like to select a different folder, click Browse.
	C:\Program Files (x86)\ClaimsConnect
	At least 33.7 MB of free disk space is required.
Niç	ghtingale Informatix

7. Now the installation will begin. You will see the folder that ClaimsConnect will be installed. Click Next.

🍏 Setup - ClaimsConnect	
Select Start Menu Folder Where should Setup place the program's shortcuts?	
Setup will create the program's shortcuts in the following Star	t Menu folder.
To continue, dick Next. If you would like to select a different folder, d	ick Browse.
ClaimsConnect	Browse
Nightingale Informatix	Cancel

8. This screen is indicating that ClaimsConnect will be added to your shortcuts. Click Next.

🎲 Setup - ClaimsConnect	_ <b>_</b> ×
Select Additional Tasks Which additional tasks should be performed?	<b>R</b>
Select the additional tasks you would like Setup to perform while installing ClaimsConnect, then click Next. Additional icons:	9
Create a <u>Q</u> uick Launch icon	
Nightingale Informatix	
< <u>B</u> ack <u>N</u> ext >	Cancel

9. Check the box to create a desktop icon. Optionally, you can also choose to create the quick launch lcon, then click **Next**.

Re	eady to Install Setup is now ready to begin installing ClaimsConnect on your computer.
	Click Install to continue with the installation, or click Back if you want to review or change any settings.
	Destination location: C:\Program Files (x86)\ClaimsConnect
	ClaimsConnect Additional tasks: Additional icons: Create a desktop icon
ghting	gale Informatix

## 10. Click Install.

A progress bar will appear to show you ClaimsConnect is installing.

🚺 Setup - ClaimsConnect	
	Completing the ClaimsConnect Setup Wizard
	Setup has finished installing ClaimsConnect on your computer. The application may be launched by selecting the installed icons.
	Click Finish to exit Setup.
	Einish

11. Click on the **Finish** button. This completes the ClaimsConnect installation.

# Starting ClaimsConnect for the first Time

1. To open ClaimsConnect, launch it from your desktop icon.

ClaimsConne	t Logon		×
Login ID	admin		
<u>P</u> assword	*****		
		<u>0</u> K	<u>C</u> ancel

2. When the sreen shown above loads, enter **admin** for the Login ID and **admin** for the Password. Click the OK button.

Next the ClaimsConnect main screen will be displayed.

ClaimsConnect <u>F</u> ile <u>S</u> earch Settings <u>T</u> ools <u>H</u> elp		
2 🕅 🖌 👛 📉 🔻 🚳 🕄	🖄 🔮 👪 Show items imported from	
Folders	Active Items\Follow Up\	
Active Items [80]	Patient Name	$\bigtriangledown$
	🛛 👻 🔀 WATERS, JOAN .	UI
	🛛 👻 🔀 CALMEST-ANGRY, GREGG .	W
Claims [14]	👻 🌠 CALMEST-ANGRY, GREGG .	W
Statements [1]	🛛 👻 🎇 CALMEST-ANGRY, GREGG .	W
Reports [51] Notifications [14]	🛛 👻 🎇 CALMEST-ANGRY, GREGG .	$\sim$
Archived Items [1]	👻 🙀 CALMEST, GREGG .	VI
	👻 🔀 CALMEST, GREGG .	VI

3. Click on Settings from the menu list, then Application

ClaimsConr	lect	
File Search	Settings Tools Help	
2 🕾 🔟	Application	§ 🤇
Folders	Users Rights	Acti
Active I 🖉 🖉	w This Session [0]	<b>*</b>
	ow Up [7] ms [14]	*
	tements [1]	

The ClaimsConnect Settings screen will load.

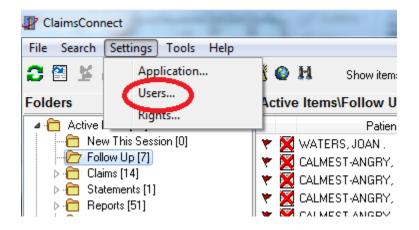
4. On the screen below fill out all the information on the top half of the form. Then click on the **Modify** button.

ClaimsConnect Settin	ngs	a 4000			×
General Internet F	Reminders ANSIEd	ts Provider Site	Number	Advanc	ed Settings
The following inform	ation is necessary to	establish your acc	count:		
Organization Name	VantageMed				
Organization Type	Solo Practice				
Tax ID		Employer	ID Nbr	💿 Soc	Sec Nbr
Primary Contact			Phone	1	
* EMail			× Fax		
Address	600 W. Cummings F	ark			
Address 2	Ste 3450				
City / State / Zip	Woburn		MA	0180	1
	Group Number 🔲	0013	<u>M</u> odify		
	* Terminal ID				
🔽 Flag rejecte	d claims for Follow U	1			
📝 Display erro	r summary on import (	ANSI only)			
Allow Claim					
	licate Claims				
Use POMIS	-				
	ate status on import				
Lenerate al	l Claim Status in 5010			[*	= optional )
				ļΚ	<u>C</u> ancel
L					

5. On the screen shown below you will need to enter your assinged G#. You can find it in the welcome email that was sent to you by the Helper Enrollment team.

Modify G	roup Number
	Group Number
	G00000
	Confirm Group Number G00000
	<u>Q</u> K <u>C</u> ancel

6. Click the **OK** button. You should now be back to the main ClaimsConnect screen. Click on the **Settings** option from the top menu, then select Users.



1	Vsers 2				
	Login ID	User Name	]	General Rights	
				rights	
	admin	Administrator			
	test	test			
				Login ID	admin
				User Name	Administrator
				Password	NNNNN
	<u>C</u> reate	Modify De	elete		

You will now be at the screen to set up user names.

7. On this screen highlight the line for the **admin**, then click on the **Modify** Button. On the next screen, only update the **Password** and then click **OK**.

🖉 Modify User	x
Login ID	admin
User Name	Administrator
Password	*****
Verify Password	*****
	OK <u>C</u> ancel

You will now be back to the screen below. Click the X to close this screen.

🕼 Users	and the second value of	
Login ID	User Name	General Rights
admin	Administrator	
test	test	Login ID admin User Name Administrator Password ******
Creat	e <u>M</u> odify	Delete Activate Admin User

You will now be back to the main ClaimsConnect screen. This completes the initial install for ClaimsConnect.

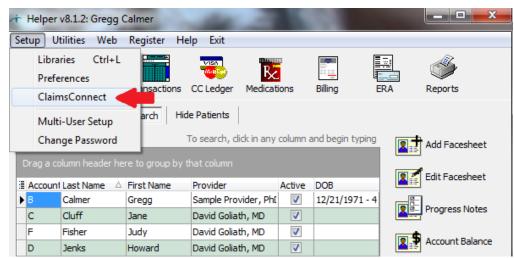
You will now need to run the ClaimsConnect Wizard in Helper.

# Setting Up Helper to Use ClaimsConnect

# **ClaimsConnect Wizard**

You now need to set up Helper to send out claims using ClaimsConnect by running the ClaimsConnect Wizard.

1. On the Helper screen click setup and choose **ClaimsConnect** from the drop-down list.

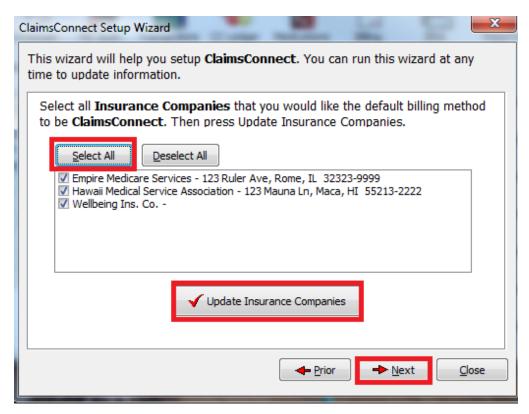


The License Agreement screen will be displayed.

ClaimsConnect Setup Wizard
This wizard will help you setup <b>ClaimsConnect</b> . You can run this wizard at any time to update information.
Plug-In End User License Agreement
This Agreement (the "PI Agreement") is a legal agreement between you (either a single individual or a single entity, - hereinafter "you") and Therapist Helper, Inc. a subsidiary of Netsmart Technologies, Inc. (collectively, "NETSMART" or "we" as the context requires) regarding the use of NETSMART's software entitled "ClaimsConnect", "ClaimsConnect Small Network", or "ClaimsConnect Client-Server," including any associated user documentation and assistance provided to you, over a network, or other delivery method, and whether in electronic, written, or oral form (cumulatively, the "Software").
THIS PI AGREEMENT SUPPLEMENTS AND CONFIRMS THE TERMS OF THE AGREEMENT YOU ACCEPTED WHEN YOU ACQUIRED A LICENSE TO THE THERAPIST HELPER SOFTWARE PROGRAM. PLEASE READ THESE ADDITIONAL TERMS CAREFULLY BEFORE ACCEPTING THESE ADDITIONAL TERMS. YOU ACCEPT THESE TERMS BY OPENING THE SOFTWARE BACKAGE OF IF YOU ARE ACCESSING OF
Please read the entire <b>Commerce Agreement</b> prior to <b>Accepting</b> .
✓ I <u>A</u> ccept  P <u>r</u> int
<>⊨ Prior ▶ Next Close

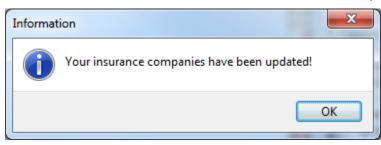
2. Accept the agreement and click Next.

The next screen is for setting up the Insurance Company Billing methods. It will change them to ClaimsConnect. New facesheets you create from this point will default to ClaimsConnect for the Insurance Company billing method.



3. On this screen click on Select All, then Update Insurance Companies, then Next

The next screen will confirm the selected insurance companies have been updated.

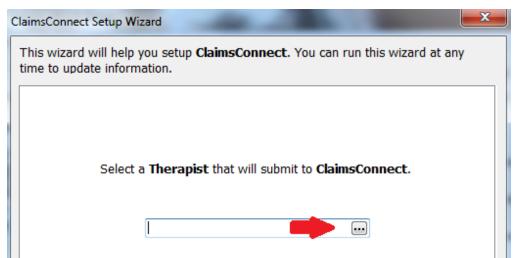


4. Click OK.

You will now be back the list of Insurance Companies.

1	ClaimsConnect Setup Wizard					
	his wizard will help you setup <b>ClaimsConnect.</b> You can run this wizard at any me to update information.					
	Select all <b>Insurance Companies</b> that you would like the default billing method to be <b>ClaimsConnect</b> . Then press Update Insurance Companies.					
	Select All					
Empire Medicare Services - 123 Ruler Ave, Rome, IL 32323-9999     Hawaii Medical Service Association - 123 Mauna Ln, Maca, HI 55213-2222     Wellbeing Ins. Co						
	✓ Update Insurance Companies					
	← <u>P</u> rior <u>N</u> ext <u>C</u> lose					

On the following screen you need to enter the name of the provider that will be using ClaimsConnect to send claims.



1. Click on the 3 dot ellipses and your therapist library will open. Highlight the name of the therapist you wish to select.

1	Therapists											
1	iei	apisi	5									
C	) sea	arch, di	ck in any co	lumn and be	gin	typing						
						the test and some						
	rag	a colun	nn neader r	iere to group	JOY							
	ID	Status	Last Name	First Name I	MI	Address 1	Address 2	City	St	Zip Code	Phone	
•	DG		Goliath	Dav		500 W. Cummings Park	Suite 3450	Woburn	MA	01801-1		
	Α		Provider	Sample		600 W. Cummings Park	Suite 3450	Woburn	MA	01801		
_												
	-	Add	- Aliana - A	Edit fi		elete 🕒 Print	Exp	ort				
					80 -		)					
										<u>о</u> к		Cancel

#### 2. Click OK.

The name of the therapist will now be displayed in the box on the screen below.



3. Verify the correct name is displayed and click Next.

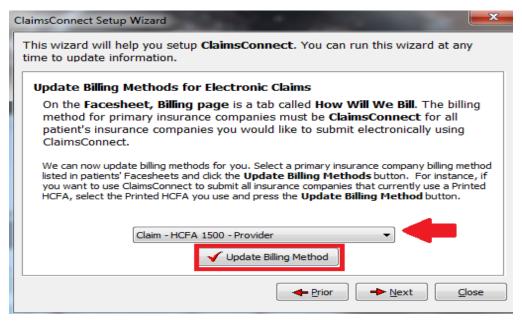
(	ClaimsConnect Setup Wizard
	This wizard will help you setup <b>ClaimsConnect</b> . You can run this wizard at any time to update information.
	Enter the <b>ClaimsConnect Provider Identifier</b> that has been assigned to the Therapist selected in the previous screen. It will be saved in the Therapist Library as a Secondary Id with a <b>G5</b> qualifier.

4. Enter the P# number you were given in the Welcome email from the Enrollment team, then click **Next** 

The next screen is how you will update the patient facesheets to use ClaimsConnect for a billing method.

ClaimsConnect Setup	Wizard	×				
This wizard will he time to update info	elp you setup <b>ClaimsConnect</b> . You or primation.	can run this wizard at any				
Update Billing I	Methods for Electronic Claims					
method for prin	eet, Billing page is a tab called Ho mary insurance companies must be ance companies you would like to su	ClaimsConnect for all				
We can now update billing methods for you. Select a primary insurance company billing method listed in patients' Facesheets and click the <b>Update Billing Methods</b> button. For instance, if you want to use ClaimsConnect to submit all insurance companies that currently use a Printed HCFA, select the Printed HCFA you use and press the <b>Update Billing Method</b> button.						
	All					
All Don't Submit Delay Submit						
	ClaimsConnect ANSI 837 Claim - HCEA 1500 - Eacility	ext <u>C</u> lose				
	Claim - HCFA 1500 - Provider					

5. Click on the down arrow and select the print method you used for printed claims.



6. Check that the proper billing method is displayed and then click Update Billing Method.

You will get a confirmation that your facesheets were updated.

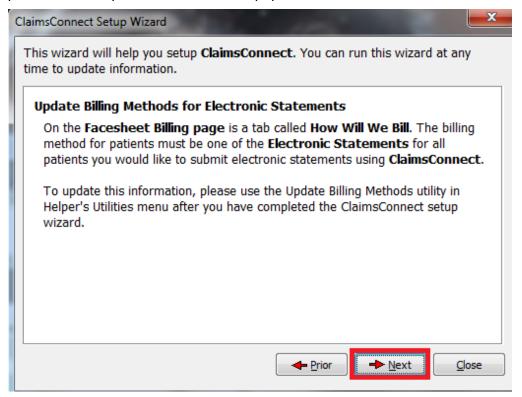
Confirm	x
Your facesheets have been updated!	
	ОК

7. Click OK.

(	ClaimsConnect Setup Wizard				
	his wizard will help you setup <b>ClaimsConnect.</b> You can run this wizard at any me to update information.				
l	Update Billing Methods for Electronic Claims				
On the Facesheet, Billing page is a tab called How Will We Bill. The billing method for primary insurance companies must be ClaimsConnect for all patient's insurance companies you would like to submit electronically using ClaimsConnect.					
	We can now update billing methods for you. Select a primary insurance company billing method listed in patients' Facesheets and click the <b>Update Billing Methods</b> button. For instance, if you want to use ClaimsConnect to submit all insurance companies that currently use a Printed HCFA, select the Printed HCFA you use and press the <b>Update Billing Method</b> button.				
	Claim - HCFA 1500 - Provider				
	← Prior ► Next Close				

#### 8. Click Next.

The next screen describes how you set your facesheet to use our electronic statements to bill your patients instead of you printing out the patient bill. This option will allow you to use ClaimsConnect to send your patient bill. The patients will receive a paper sent from us.



-	ClaimsConnect Setup Wizard
	This wizard will help you setup <b>ClaimsConnect</b> . You can run this wizard at any time to update information.
	You have completed the setup needed to use <b>ClaimsConnect</b> for this provider. If you have multiple providers, you may run this wizard again.
	<u>Run the wizard again</u>

You have completed the ClaimsConnect set up wizard. Now there are several steps needed before you can send the claims using Claims Connect.

# Setting up the Provider information

Setting up the therapist.

Ar Helper v8.1.2: Gregg Calmer							
Setup Utilities Web Register Help Exit							
Libraries							
Preferences View 🔛 🛄							
ClaimsConnect Insactions CC Ledger Medications Billing	ERA Reports						
Multi-User Setup arch Hide Patients							
Change Password To search, click in any column and begin typing	Add Facesheet						
Drag a column header here to group by that column							
Example Active DOB							
B Calmer Gregg Sample Provider, Pht 📝 12/21/1971 - 4	Progress Notes						

1. On the Helper main screen, click on **Setup** and choose **Libraries** from the drop down list.

7 Libraries				( * ) -	-	1				×
▲ · Primary		Thera	pist	s						
Accounts Facilities		To sea	To search, dick in any column and begin typing							
···· Insurance Companies ···· Lawyers	Ш	Drag								
Medications		∃ ID :	Status	Last Name	First Name	MI	Address	1	Address 2	City
···· Programs		DG		Goliath	David		500 W. O	Cummings Park	Suite 3450	Wob
Services		► A		Provider	Sample ┥		🛑 W.	Cummings Park	Suite 3450	Wob
Therapists Referring Physicians										
▲ Codes		•								•
Diagnosis Codes Taxonomy	Ŧ		<u>A</u> dd		it 1	<u>†</u> ∎	elete	Print	Exp	ort

2. On the Libraries sceen select **Therapists**. Highlight the name of therapist that will be using ClaimsConnect, then click **Edit**.

T	herapist: Sample Pro	vider, PhD				×
	General Claim Settir	ngs Supervisor Sche	dule	Credit Card Info.		
	ID:	Α				<u>E</u> xtra Info
	First Name:	Sample	MI:	DEA #/Vendor #:		Fee Schedule
	Last Name:	Provider		SSN/EIN		
	Degree:	PhD		Use the Claim Setting values for claims pro		
	Address:	600 W. Cummings Parl	ĸ	SS Number:		
	(Will not print on claims)	Suite 3450		Employer ID #:		
	City:	Woburn	St: M/			
	Zip Code:	018011234		Starting Date:	4/28/2014 🕅	
	Business 📼	() -		Pay by %:	25%	

3. Once the Therapist screen is open, check that you have a 9 didgit zip code entered with no dashes or spaces. Now click on the **ClaimsConnect** tab at the top of the screen.

# **Taxonomy Codes**

## Step A

herapist: S	Sample Provide	r, PhD	18	-	
General	Claim Settings	Supervisor	Schedule	Credit Card	d Info.
Label		Valu	e		Instruct
. E Tax	onomy				Тахо
Billin	ig Entity Type	Pers	son		ANSI
T Ren	dering Entity Typ	e Pers	Person		
Pay	-To Address				•
_	- 1 /				

1. If you have already added a Taxonomy code, click the + symbol next to it.

General Cla	aim Settings	Supervisor	Schedule	Credit Card Info.			
Label		Value	2	Instr	ructions	<u>E</u> xtra Info	
Taxonomy 207L00000X, Anest Billing Entity Type Rendering Entity Type Pay-To Address Tax Id/SSN NPI Secondary Ids: G5 - Provider Site Num		Pers pe Pers 333: 555:	Person Person 333333333 55555555555		<ul> <li>xonomy will export to the SI 837.</li> <li>Billing Provider Taxonomy in Loop 2000A</li> <li>Rendering Provider Taxonomy in Loop 2310B and 2420A</li> <li>Referring Provider Taxonomy in Loop 2310A and 2420F</li> </ul>	Fee Schedule	
Add	'≧ Add <b>(2) Edit (a)</b> Delete					Save Save & <u>A</u> dd	

2. Click on the taxonomy code then click **Edit** on the bottom of the window.

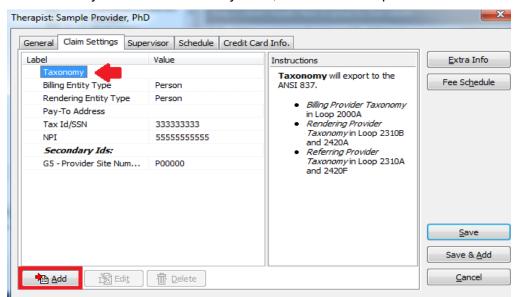
Taxonomy		×								
Taxonomy will export to the ANSI 837.										
<ul> <li>Rendering</li> </ul>	<i>ider Taxonomy</i> in Loop 2000A <i>Provider Taxonomy</i> in Loop 2310B Provider Taxonomy in Loop 2310A a									
Therapist:	Provider, Sample									
Taxonomy:	207L00000X									
Description:	207L00000X, Anesthesiology									
	✓ Default									
	<u></u>	K <u>C</u> ancel								

3. Make sure you check the **Default** box then click **OK**.

You will now be back to the claims settings tab. Go to Step C.

## STEP B

If you haven't already entered a Taxonomy code, follow these steps.



1. Click on Taxonomy than click Add.

Taxonomy									
Taxonomy will export to the ANSI 837.									
<ul> <li>Rendering</li> </ul>	<i>vider Taxonomy</i> in Loop 2000A Provider Taxonomy in Loop 2310B and 2420A Provider Taxonomy in Loop 2310A and 2420F								
Therapist:	Provider, Sample								
Taxonomy:									
Description:									
	Default								
	<u>O</u> K <u>C</u> ancel								

2. Click on the 3 dot elipses to the right of the Taxonomy line.

axonomy				
o search, dick	in any column and begin typing			
Drag a column				
Code	Туре	△ Classification		
103G00000X	Behavioral Health & Social Service Providers	Clinical Neuropsychologist		
103GC0700X	Behavioral Health & Social Service Providers	Clinical Neuropsychologist		
101Y00000X	Behavioral Health & Social Service Providers	Counselor		
101YA0400X	Behavioral Health & Social Service Providers	Counselor		
101YM0800X	Belief Belief Belief & Social Service Providers	Counselor		
101YP1600X	Behavioral Health & Social Service Providers	Counselor		
101YP2500X	Behavioral Health & Social Service Providers	Counselor		
101YS0200X	Behavioral Health & Social Service Providers	Counselor		
106H00000X	Behavioral Health & Social Service Providers	Marriage & Family Therapist		
102L00000X	Behavioral Health & Social Service Providers	Psychoanalyst		
🗴 📝 (Туре	= Behavioral Health & Social Service Providers)	Customize		
•	III	4		
Print	Export			

3. Click on the taxonomy code for your specialty and click **OK**.

Taxonomy	Taxonomy								
Taxonomy will export to the ANSI 837.									
<ul> <li>Billing Provider Taxonomy in Loop 2000A</li> <li>Rendering Provider Taxonomy in Loop 2310B and 2420A</li> <li>Referring Provider Taxonomy in Loop 2310A and 2420F</li> </ul>									
Therapist:	Provider, Sample								
Taxonomy:	10 1YM0800X	•••							
Description:	101YM0800X, Mental Health, Counselor								
	V Default								
		ancel							

4. Verify the proper Taxonomy code is entered. Make sure to check the **Default** box is checked. Click on the **OK** buton.

#### STEP C

Now you need to set up your Billing Entity Type. This will determine whether you bill as an individual provider or as a group. If you bill as an individual continue here, if you bill as a group go to step D.

Therapist: Sample Provider, PhD		<b>X</b>
General Claim Settings Supervisor Schedule Credit C	ard Info.	
Label Value	Instructions	Extra Info
Taxonomy Billing Entity Type Rendering Entity Type Pay-To Address Tax Id/SSN NPI Secondary Ids: G5 - Provider Site Num P00000	Billing Entity Type will         determine the contents of Box         25 and Box 33 on the 1500 Claim         Form. When the Entity Type is a         non-person, the selected Fadility         will be used.         Billing Entity Type will export         to the ANSI 837 claim in Loop         2010AA.         The Pay-To Provider option is         only valid when exporting 4010         ANSI 837 claims.	Fee Schedule
Add State The Delete		Save Add

1. Highlight the **Billing Entity Type** and then **click** Edit.

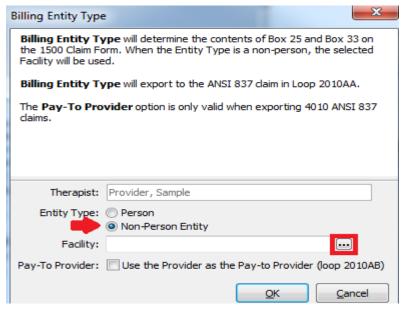
Billing Entity Type							
<b>Billing Entity Type</b> will determine the contents of Box 25 and Box 33 on the 1500 Claim Form. When the Entity Type is a non-person, the selected Facility will be used.							
Billing Entity Ty	Billing Entity Type will export to the ANSI 837 daim in Loop 2010AA.						
The Pay-To Pro	The Pay-To Provider option is only valid when exporting 4010 ANSI 837						
ciums.							
Therapist:	Provider, Sample						
Entity Type:	Person						
	Non-Person Entity						
Facility:							
Pay-To Provider:	Use the Provider as the Pay-to Provider (loop 2010AB)						
	<u>O</u> K <u>C</u> ancel						

2. Make sure to click on the circle next to person. Click on the **OK** button.

## STEP D

General	Claim Settings	Supervisor	Schedule	Credit Card In	fo.		
Billin Ren Pay Tax NPI	onomy g Entity Type dering Entity Typ -To Address Id/SSN condary Ids: Provider Site Nu				Istructions Billing Entity Type will determine the contents of f 25 and Box 33 on the 1500 Form. When the Entity Typ non-person, the selected F will be used. Billing Entity Type will ex to the ANSI 837 daim in Loc 20 10AA. The Pay-To Provider opt only valid when exporting 4	Claim e is a acility port op	
AI	dd 💦 Ed	iit_	Delete		ANSI 837 daims.	Save 8	<u>A</u> dd

1. Highlight the **Billing Entity Type** and click on **Edit**.



2. Click the circle next to Non-Person Entity then click the 3 dot elipses to the right the Facility box.

i	Lik	oraries	starting lands in the						X		
F	Facilities										
Т	To search, click in any column and begin typing										
	Drag	a colun	nn header here to	group by	/ that column						
3	ID	Status	Name 1	Name 2	Address 1	Address 2	City	St	Zip Code		
	Α		BSI Psychological		sychological Avenue	Suite 3150	Woburn	MA	01801-2		
	С		Netsmart		4950 College Blvd		Overlan	KS	66211-0		
	🐴 🗚 🕅 🟦 Edit 👘 Delete 🕒 Print 🗈 Export										

3. Highlight the name of the facility you wish to use for your billing information. Click on the **OK** button.

	Therapist:	Provider, Sample
	Entity Type:	<ul> <li>Person</li> <li>Non-Person Entity</li> </ul>
	Facility:	BSI Psychological
l	Pay-To Provider:	Use the Provider as the Pay-to Provider (loop 2010AB)
		<u>O</u> K <u>C</u> ancel

4. Verify the correct facility name is in the Facility section and click OK.

You should now be back to the **ClaimSettings** tab.

Therapist: Sample Provider, P	hD		X
General Claim Settings Su	pervisor Schedule	Credit Card Info.	7
Label	Value	Instructions	<u>E</u> xtra Info
<ul> <li>         ★ Taxonomy Billing Entity Type Rendering Entity Type Pay-To Address Tax Id/SSN NPI Secondary Ids: G5 - Provider Site Num     </li> </ul>	Non-Person	Rendering Entity Type will export to the ANSI 837 daim in Loop 2310B and 2420A. When the Entity Type is a non-person, the selected Facility will be used.	Fee Schedule
Add 🕅 Edit	Delete		Save

5. Highlight the **Rendering Provider** line and click on the **Edit** button.

1	Rendering Entity	Туре	
		<b>ty Type</b> will export to the ANSI 837 da n the Entity Type is a non-person, the s	
	Therapist:	Provider, Sample	
	Entity Type:	Person     Person     Entity     Non-Person     Entity	
	Facility:		
		ОК	<u>C</u> ancel

6. Select **Person** and click the **OK** button.

Provider: Sample Provider, PhD			×
General Claim Settings Supe	rvisor Schedule Credit Car	rd Info.	
General       Claim Settings       Supe         Label       ■       Taxonomy         Billing Entity Type       Rendering Entity Type         Pay-To Address       Tax Id/SSN         NPI       Secondary Ids:         G5 - Provider Site Num	visor   Schedule   Credit Car Value Person Person : : P00000	Instructions  Rendering Entity Type will export to the ANSI 837 daim in Loop 2310B and 2420A. When the Entity Type is a non-person, the selected Facility will be used.	Extra Info Fee Schedule
Add 👔 Edit	鄙 <u>D</u> elete		Save & <u>A</u> dd

- 7. Verify it says **Person** next to **Rendering Entity Type**.
- 8. Select Tax ID/SSN, then select the **Edit** button

eneral Claim Settings Sup	ervisor Schedule Credit (	Card Info.	
Label	Value	Instructions	<u>E</u> xtra Info
<ul> <li>Taxonomy</li> <li>Billing Entity Type</li> <li>Rendering Entity Type</li> <li>Pay-To Address</li> <li>Tax Id/SSN</li> <li>NPI</li> <li>Secondary Ids:</li> <li>G5 - Provider Site Num</li> </ul>	Person Person P00000	Tax ID will populate Box 25 of the 1500 Claim Form.         In the ANSI 837 claim, when an NPI is not available         • Referring Physician Tax Id will export to Loop 2310A and 2420F         • Rendering Provider Tax Id will export to Loop 2310B and 2420A         • Service Facility Tax Id will export to Loop 2310D and 2420C         • Billing Provider Tax Id will export to Loop 2310D and 2420C         • Billing Provider Tax Id will export to Loop 2310D and 2420C	Fee Schedule

Tax Id/SSN	_ ×
Tax ID will popula	ate Box 25 of the 1500 Claim Form.
In the ANSI 837	daim, when an NPI is not available
<ul> <li>Rendering</li> <li>Service Fa</li> <li>Billing Prov</li> </ul>	Physician Tax Id will export to Loop 2310A and 2420F Provider Tax Id will export to Loop 2310B and 2420A will to the to Loop 2310D and 2420C wider Tax Id will export to Loop 2010AA. Insition period the Tax Id will be output along with the NPI.
Provider:	Provider, Sample
Tax Id/SSN:	33333333
Tax Id Type:	💿 SSN 🛛 💿 EIN 🚽
Claim Box 25:	Don't check 1500 Claim Form Box 25
	<u>O</u> K <u>C</u> ancel

9. Enter your **Tax Id/SSN** and then select the proper **Tax Id** type. The box for **Claim Box 25** is typically not checked. Now click the **OK** box.

General Claim Settings Supe	rvisor Schedule Credit	Card Info.		
Label	Value	Instructions		<u>E</u> xtra Info
Taxonomy		NPI is the Health Care	*	
Billing Entity Type	Person	Financing Administration National Provider		Fee Schedule
Rendering Entity Type	Person	Identifier.		
Pay-To Address				
Tax Id/SSN	33333333	On the 1500 Claim Form	Ξ	
NPI		(08/05)		
Secondary Ids:		Referring Source NPI		
G5 - Provider Site Num	P00000	will print in box 17b		
		<ul> <li>Rendering Provider NPI will print in box</li> </ul>		
		243		
		<ul> <li>Facility NPI will print in box 32a</li> </ul>		
		<ul> <li>Billing Provider NPI will</li> </ul>		
		come from the		Save
		Provider when the Billing Entity Type is a		
		person and from the	-	Save & <u>A</u> dd
🐴 🗚 dd	価 Delete			

10. Verify the correct Tax Id is entered. Then highlight NPI and click on **Edit**.

General Claim Settings Supe	rvisor Schedule	edit Card Info.		
Label	Value	Instructions		<u>E</u> xtra Info
Taxonomy	Deese	NPI is the Health Care	<b>^</b>	Fee Schedule
Billing Entity Type Rendering Entity Type	Person Person	Financing Administration National Provider		[
Pay-To Address		Identifier.		
Tax Id/SSN	33333333	On the 1500 Claim Form	Ξ	
NPI	555555555	(08/05)		
Secondary Ids:		Referring Source NPI		
G5 - Provider Site Num	P00000	<ul> <li>will print in box 17b</li> <li>Rendering Provider NPI will print in box 241</li> <li>Facility NPI will print in box 32a</li> <li>Billing Provider NPI will come from the Provider when the Billing Entity Type is a person and from the</li> </ul>	-	Save

11. Verify you entered the correct NPI #. Now click Save. You have completed Therapist set up.

Next you need check the insurance company settings.

# Setting up Insurance Company information

These are the steps to set up the Insurance Companies to use ClaimsConnect.

🕆 Helper v8.1.2: Gregg Ca	lmer		l	- 0 ×
Setup Utilities Web R	Register Help Exit			
Libraries		-		Â.
Preferences	- <u>**</u>	<b>K</b>		
ClaimsConnect	insactions CC Ledger	Medications Billing	ERA F	leports
	arch Hide Patients			
Multi-User Setup				
Change Password	To search, c	lick in any column and begin	typing 💽 🛨 A	dd Facesheet
Drag a column header here	to group by that column			
∃ Account Last Name △ F	irst Name Provider	Active DOR	E 100 E	dit Facesheet
	Gregg Sample Provider	Active DOB vider, PhI 📝 12/21/19	71-4	
			I II 🛛 🕅 🗌 P	roaress Notes

1. From the main Helper screen, click on **Setup** and select Libraries.

A · Primary		Insuran	ce C	ompanies				
Accounts Facilities				n any column and begin typing				
Insurance Companies Lawyers	Ε	Drag a co						
Medications		∃ID S	tatus	Company Name 🛆	Address 1	Address2	City	s
··· Programs		► EMS		Empire Medicare Services 🔍	3 Ruler		Rom	I
··· Procedures		HMSA		Hawaii Medical Service Association	123 Maun		Mac	H
Procedure Groups Providers		WELL		Wellbeing Ins. Co.				
Referring Physicians		4		III				

2. Click on **Insurance Companies**. The right side of the screen will display the names of the insurance companies. Highlight the one you will be using with ClaimsConnect and click on **Edit**.

Contact	Billing	Tax	Claim Options	Provider Claim S	Settings	Claim Settings		
	Insu	rance ID:	M	7				<u>E</u> xtra Info
		ny Name:		ue Shield				Fee Schedule
		Address:	123 Main St					
		City:	Boston	••• St:	MA			
		Zip Code:	02215	•••				
	Contac	t Person:						
	Bu	siness 💌	(800) 555-55	55				
	Busines	s Fax 🔻	() -					
		E-mail 💌						
	Web	Page 💌						
		Notes	:				•••	
		Status	Active	O Inactive				<u>S</u> ave
								Save & <u>A</u> dd
								<u>C</u> ancel

3. Enter the Contact information of the Insurance company. Then, select the **Billing** tab.

surance	Company: Empire Med	dicare Services	<b>—</b> ×
Contact	Billing Claim Options	Provider Claim Settings	
	Managed Care Action: Comment:		Extra Info Fee Schedule
	Box 27 Claim Default: Box 32b and 33b: Loop 2310B:	<ul> <li>ACCEPT INSURANCE ASSIGNMENT?</li> <li>Insert a space between the qualifier and the id</li> <li>Output in all claims, regardless of Loop 2010AA values</li> <li>Use the Supervisor in place of the Rendering Provider Show why Loop 2310b is being used</li> </ul>	
	Payor Organization ID: Payor Claim Office #:		
	Payor Identification #: ERA Paver Id:	(5010 loop 201068 REF*2U)	

4. Enter the payer ID of the insurance company. Click the 3 dot ellipses in the **Payer Organization ID** line.

Payer List This is a list of Payer names and I accepted for electronic transaction		у
Payer Name	△ Payer ID	
BC BS OF NY - ROCHESTER AREA	SB804	(
BC BS OF NY - UTICA WATERTOWN / RMSCO INC.	CLAIMS SB806	(E)
BC BS OF NY - WELLCHOICE OF NJ	SB803	
BC BS OF NY - WESTERN (HEALTHNOW)	SB801	
BC BS OF OH (ANTHEM)	SB338	
BC BS OF OK	SB840	
BC BS OF OR (DIRECT THROUGH THIN)	THBOR	
BC BS OF OR (DIRECT TO THIN)	00851	
BC BS OF OR (REGENCE VIA THIN)	60085	

5. The Payer List will be on the screen. Scroll down the list and find the Insurance company that is going to use ClaimsConnect, highlight it and then click the **OK** button.

Contact	Billing	Claim Options	Provider Claim Settings	
l f	Managed	Care	Extra	a Info
	Action:			
	Comment:			: <u>h</u> edule
	Box 27 Claim Default: IV ACCEPT INSURANCE ASSIGNMENT?			
			Insert a space between the qualifier and the id	
			Output in all daims, regardless of Loop 2010AA values Use the Supervisor in place of the Rendering Provider Show why Loop 2310b is being used	
	Payor Organization ID: SB840 📖		SB840	
	Payor Cla	im Office #:		
	Payor Ide	entification #:	(5010 loop 2010BB REF*2U)	
	ERA Paye	er Id:		
	Source of Payment:		F - Commercial Insurance Company	
	Claim Filing Indicator: CI - Commercial Insurance Co. 🗸		CI - Commercial Insurance Co.	ive
ſ	Billing (used as defaults when adding a Facesheet) Billing Method: ClaimsConnect			& <u>A</u> dd
	V Whe	surance, hold daim until the primary makes a payment	ncel	

6. The Payer ID for the insurance company will now be displayed in the Payor Organization ID field. Now go to the Source of Payment line. This needs to match the type of insurance. Click the down arrow and select the proper insurance type.

Payor Identificati	ion #: (5010 loop 2010BB REF*2U)	
ERA Payer Id:		
Source of Paymer	nt: F - Commercial Insurance Company 🔹	
Claim Filing Indica	ator: F - Commercial Insurance Company	<u>S</u> ave
Billing (used as de	efaults w H - CHAMPUS	Save & <u>A</u> dd
Billing Method:	Claims K - Central Certification L - Self Administered M - Family or Friends	Cancel
	P - Blue Cross	

#### 7. Select the proper one.

Payor Identification	n #:	(5010 loop 2010BB REF*20)	
ERA Payer Id:			
Source of Payment	:	G - Blue Cross / Blue Shield 🔹 🗸 🔫	
Claim Filing Indicate	or:	CI - Commercial Insurance Co. 🔹	<u>S</u> ave
Billing (used as defa	aults w	hen adding a Facesheet)	Save & <u>A</u> dd
Billing Method:	Claims	Connect 🔹	
When seconda	ary ins	urance, hold claim until the primary makes a payment	<u>C</u> ancel

Source of Payment now shows the value you chose. Repeat this process for the Claim Filing Indicator.

Insurance Company: Empire Med	icare Services	×
Contact Billing Claim Options	Provider Claim Settings	
Managed Care	-	Extra Info
Action:		
Comment:		Fee Schedule
Box 27 Claim Default:	ACCEPT INSURANCE ASSIGNMENT?	
Box 32b and 33b:	Insert a space between the qualifier and the id	
Loop 2310B:	Output in all claims, regardless of Loop 2010AA values Use the Supervisor in place of the Rendering Provider Show why Loop 2310b is being used	
Payor Organization ID:	SB840	
Payor Claim Office #:		
Payor Identification #:	(5010 loop 2010BB REF*2U)	
ERA Payer Id:		
Source of Payment:	G - Blue Cross / Blue Shield 🔹	
Claim Filing Indicator:	BL - Blue Cross/Blue Shield 💌	<u>S</u> ave
Billing (used as defaults	when adding a Facesheet)	Save & <u>A</u> dd
Billing Method: Claim	sConnect 🔹	
When secondary in	surance, hold claim until the primary makes a payment	Cancel

8. Now Source of Payment and Claim Filing Indicator should match the insurance. Finally, click the box to **hold the claim until primary pays.** Click the **save** button. This finishes the insurance company set up. Repeat these steps for each insurance company you will be ending claims to.

### Adding the Submitter Contact information

You need to add a submitter contact information. To do this follow the following steps.

Setup Utilities Web Register Help Exit	
Scheduler MC Auth. Transactions CC Ledger Medications Billing	RA Reports
Basic Search Advanced Search Hide Patients	
Force columns to fit. To search, dick in any column and begin typing	Add Facesheet
Drag a column header here to group by that column	Edit Facesheet
E Account Last Name 🛆 First Name Provider Active DOB	
B Calmer Gregg Sample Provider, Pht 🛛 12/21/1971 - 4	

1. Click on **Billing** on the top of the Helper screen.

🛧 Billing Ledger: Gregg Calmer	- <b>19</b>	
Print Bills Print Claims Submit Claims Electronically Ready to Send Sent Closed	✓ View History	Eilter Transactions y for current patient only. Resp. Party Insurance
Balance Due 60.00	✓ Move all paid charges to 'Closed'	✓ Move a Batch of Charges
2. Click Submit Claims		Total Billod DD & .
TExport to ClaimsConnect	4	Comp in some of

	, export a	o elalinocol		distant Property		
	This proce	edure will t	ransmit insu	urance claims from Helper to <b>Cl</b>	aimsConnect.	
	Select Proce	dures Subr	mitter R			
	Select All	Dese	elect All			
l	Drag a colu	ımn header h	ere to group b	by that column		
l	Include	Date △	Patient	Billable Party	Service	Bi
	<b>V</b>	1/17/2014	Gregg Calme	Hawaii Medical Service Association -	Family Psychotherar	

3. When the Export to ClaimsConnect screen loads, click on the **Submitter** tab.

	Submitter Entity Type i Last Name		Middle Name	
	Last Name	First Name		
	🔘 Submitter Entity Type i	is a Non-Person		
	Organization Nam	ie		
	a) 1, 11, a) 1, 10	Electronic fra	nsmitter Identification Num	
-	Submitter Identifier	Established b	y trading partner agreemen	
=	Submitter Identifier Submitter Contact Name Telephone Number	Established b	y trading partner agreemen	
-	Submitter Contact Name		y trading partner agreemen	
\$	Submitter Contact Name Telephone Number	() -	y trading partner agreemen	
*	Submitter Contact Name Telephone Number Facsimile	() -	y trading partner agreemen	

4. Where it says **Submitter Contact Name** and **Telephone Number**, enter a contact for the insurance to call if they need to reach you, then click on **Close**.

You are now ready to send some claims!

## How to Send Claims Using Claims Connect

The following steps will guide you through sending electronic claims using ClaimsConnect.

THelper v8.1.2: Gregg Calmer	A	
<u>S</u> etup <u>U</u> tilities <u>W</u> eb Register <u>H</u> elp E <u>x</u> it		
Scheduler MC Auth. Iransactions CC Ledger M	🔀 🖳 l	ERA Reports
Basic Search Advanced Search Hide Patients	<b>♠</b>	
Last Name      First Name      Account #      SSN     Search		Add Facesheet
Force columns to fit. To search, dick i	n any column and begin typing	Edit Facesheet
I Account # Last Name First Name Provider	Activ 🖵 DOB 🖳 🔺	
▶ B Calmer Gregg Sample Provid	lei 🔽 12/21/1971 - 4	Progress Notes
C Cluff Jane David Goliath	, N 🔽	
e estas puto putotate	s [72]	Account Polonco

1. Click on the **Billing Icon** at the top of the Helper screen.

Billing Ledger: Gregg Calmer			x			
Print Bills       Image: Edit Encounter         Print Claims       Image: Edit Encounter         Submit Claims Electronically       Image: Edit Encounter         Ready to Send       Sent         Closed       Closed						
Balance Due 60.00	✓ Move all paid charges to 'Closed'	rges				
∃ Date Patient Billable	Party Procedure Method Total Billed	BP A	*			
▶ 1/31/2006 Gregg Calr Empire	Medicare Individual F ClaimsConnect \$85.00		(E)			
2/1/2006 Gregg Calm Empire	Medicare Individual F ClaimsConnect \$94.60					
3/28/2006 Gregg Calm Empire	Medicare Home infus ClaimsConnect \$65.00					
1/17/2014 Gregg Calm Empire	Medicare Family Psyc ClaimsConnect \$45.00		-			
•		Þ				

7 Export t	to ClaimsCor	nnect					a Maria and	the particular of			x
This procedure will transmit insurance claims from Helper to ClaimsConnect.											
Select Procedures Submitter Receiver Other											
Select A	Select All Deselect All										
Drag a col	umn header h	ere to aroun	by that column								*
Include			Billable Party			Procedure	Billed	BP Amount	Provider		
<b>V</b>	4/3/2014	Gregg Calm	Empire Medicare	e Services -	Prim	Family Psychotherapy	\$40.00	\$25.00	Sample Provider, P	hD	
<b>V</b>	4/21/2014	Gregg Calm	Empire Medicare	e Services -	Prim	Family Psychotherapy	\$40.00	\$25.00	Sample Provider, P	hD	
1	5/5/2014	Gregg Calm	Empire Medicare	e Services -	Prim	Family Psychotherapy	\$250.00	\$0.00	Sample Provider, P	hD	
<b>V</b>	5/7/2014	Gregg Calm	Empire Medicare	e Services -	Prim	Family Psychotherapy	\$40.00	\$25.00	Sample Provider, P	hD	
<b>v</b>	5/14/2014	Gregg Calm	Empire Medicare	e Services -	Prim	Family Psychotherapy	\$40.00	\$25.00	Sample Provider, P	hD	
<b>V</b>	5/29/2014	Jane S Cluf	Hawaii Medical S	Service Asso	ciati	Individual Psychothera	\$80.00	\$80.00	David Goliath, MD		
<b>V</b>	5/30/2014	Gregg Calm	Empire Medicare	e Services -	Prim	Individual Psychothera	\$85.00	\$85.00	Sample Provider, P	hD	
<b>V</b>	6/2/2014	Gregg Calm	Empire Medicare	e Services -	Prim	Family Psychotherapy	\$230.00	\$215.00	Sample Provider, P	hD	Ξ
						27 Procedures	\$2,079.48	\$1,409.60			+
					_			_			_
								🗸 🗸 📝	it Data Now	Close	

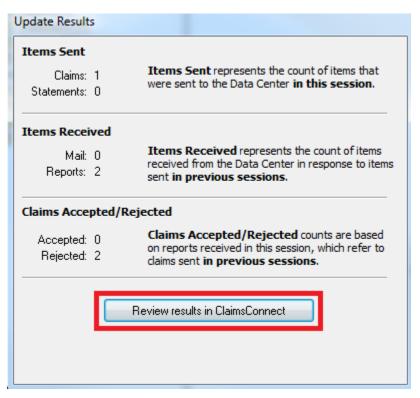
3. The Export to ClaimsConenct screen will now be displayed. It will show all the claims that are ready to be sent. Click on **Transmit Data Now**.

ClaimsConnect Login		×		
Netsmart Claims	Connecť	Login		
Provide the Username and Password that you have previously setup in ClaimsConnect. This could be different than your Helper Username and Password.				
ClaimsConnect, avoidi automatically log into ( turned on in Setup, Pr	ity to automatically log y ng this screen. To allow ClaimsConnect you must <i>eferences, General, Fea</i> assword setup in both H	Helper to have Passwords a <i>tures</i> and have the		
Username	admin			
Password	******			
	<u></u> K	<u>C</u> ancel		

4. Enter the Username and Password you created for ClaimsConnect. Click OK.

ClaimsConnect				
File Search Settings Tools H	elp			
2 🖺 🖌 🗎 🗞 👻 🦉	) 🛛 🖄 🕘 🛛	Show items imported	from	▼ to 05/1
Folders	Archive	ed Items\Reports\		
Active Items [87]     Active Items [87]     Follow Up [10]     Gaims [17]     Gaims [17]     Reports [52]     Notifications [17]     Archived Items [4]     Gaims [3]     Statements [0]     Reports [0]     Notifications [1]		Patient Name nect ew the ClaimsConnect Reminders by r (bell) button on the toolbar	Claim ID	Charge

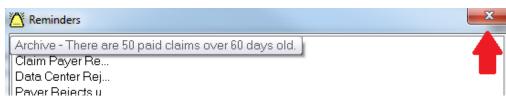
5. ClaimsConnect will open. Click on the **OK** button.



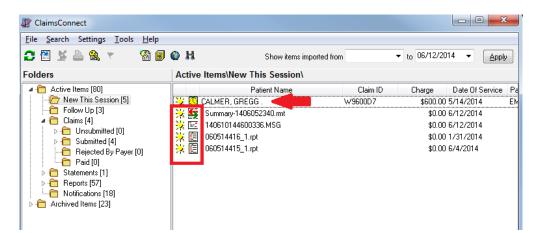
6. Click on Review results in ClaimsConnect.

ClaimsConnect	1 100 g		
<u>File Search Settings Tools</u>	<u>H</u> elp		
2 🗄 🖌 🖱 🛠 🗡	🖀 🗧 🔼 🧉 M	Show items imported from	▼ to 06/30/2014 ▼ Apply
Folders	ctive Items		
Active Items [2118]		Patient Name 🛛 🗸 Clair	n ID Charge Date Of Service I 🔺
📄 👘 New This Session [0]	🔫 🔀 Z	55	A \$300.00 5/19/2014 🛝 💻
Follow Up [261]	🛛 👻 🔀 Z	52	0 \$150.00 5/28/2014 \
Claims [2060]	🛛 🔻 👿 Z	42	21 \$150.00 5/20/2014 \
▷ · C Statements [0] ▷ · C Reports [28]	z 🔣 z	⊃(	D \$150.00 5/12/2014 \
Notifications [30]	🛛 🔻 🔀 Z	4>	
<ul> <li>Archived Items [24630]</li> </ul>	🛛 🧱 Z	-L	E \$300.00 5/2/2014 E

7. When ClaimsConnect opens, click on the yellow bell icon at the top of the screen. This will open the reminders screen.



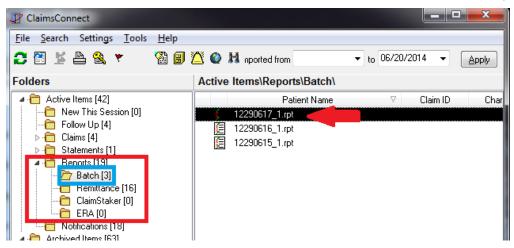
8. This screen displays 4 lines. If you place your mouse cursor over one of the lines it will display issue that you should fix. For the example here, it is showing that there are 50 claims still in the active folder that have been paid. It is recommended you archive the claims. After you have gone over the reminders, close the reminder window by clicking the X at the top right of the screen.



This screen shows you the results of your sending the claims. The first line shows the claim you sent. The yellow sun icon to the left indicates it was just sent. The yellow clock icon next to that indicates it has been sent to our data center. This means that we have received your claim but it has not yet been forwarded to the insurance company.

## ClaimsConnect Reports

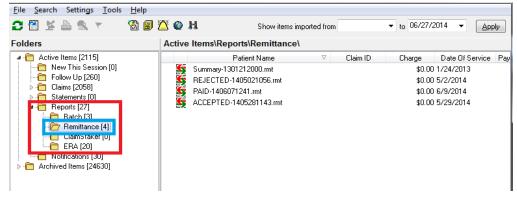
The information in the red box are reports. We will cover the different report types next.



The left side of the ClaimsConnect screen shows the different folders. The section in red contain the reports you will receive regarding your claims. The blue box are for the **Batch reports**. These are reports from our data center. The individual reports are displayed on the right. If you double click on the report it will open.

Once the report is opened it will list each claim that was sent in that batch and if the claim was rejected by our data center it will describe why it was rejected. The bottom of the report will total the number of claims sent, the total rejected and the number accepted and the total value of the accepted claims. Once you've read the report **made any corrections to rejected claims** click **Archive** on the bottom of the report.

The next type of report is the **Remittance report.** These reports are sent by the clearing house, Change Healthcare and from the insurance companies.



The four main types of reports you will see are Summary Reports.

Remittance Repor	t (Summary-1:	301212000)		<u> </u>
Date Received: 01/24/2013				∎ <b>≣</b>
				*
Provider Summary	P N	, 2		
Rejections	: 1	\$275.00		
Forwarded Paper	: 0	\$0.00		
Forwarded EDI	: 23	\$3,145.00		
Processed	: 24	\$3,420.00		
=======================================				
MAILBOX Summary	: G – C	FOR	W.	
Rejections	: 1	\$275.00		=
Forwarded Paper	: 0	\$0.00		
Forwarded EDI	: 107	\$16,790.00		
Processed	: 108	\$17,065.00		-
				Þ
Follow up Note				
👻 Follow Up		Archive	Print	

This report shows the total number of claims sent on the date at the top of report. It list the total number of claims sent by provider and a total for the pracatice at the end of the report.

.

The next type of report is the **Rejected report**.

Provider Name :	P – N , A			
Patient Name :	E M D	ate of Service : 0	5/01/2014	
Pat. Acct # :	W8 C.	laim Tracking ID: G	21 OP	
Carrier Trace#:	17 55 P	ayer Trace# :		
Total Charges :		mount Paid : N		
Message From :	AVAILITY R	eport Created : 0	5/02/2014 12:20:42	
	SB900 - BLUE CROSS BLUE SH			
-	A3 : Acknowledgement/Ret	-		n 🗉
Explanation :	Value of sub-element HI01-			
	is from external code list			
	when HI01-01='BK'. Segment		he guideline	
	at position 2310. Invalid	data: 3140		
	2300 HI 1			
Number of Claim	a referenced. 1			
Total Charges	: \$150.00			
Total charges	: \$130.00			
				-
•	III			•
Follow up Note				
			A	
🔻 Follow Up	Archiv	ve 🕒 <u>P</u> rint		

This report will list the provider and patient information. It will also indicate who sent the report (BLUE BOX). The name of the payer (Purple Box), and the reason for the rejection. These can be fairly difficult interpret but there is usually a spot where it will describe the actual reason. In this case it is the diagnosis code which is underlined in red. Once the claim has been corrected click Archive at the bottom of the report.

### The next type of report is the **PAID report**.

PAID CLAIMS REPORT	Date: 06/07/2014 12:41:40 PM Page: 1
Provider Name : P	
Payer Name : SB900 - BLUECROSS BLUES Explanation : F1 : Finalized/Paymen Explanation : 90837 CO 16 - Claim/ser needed for adjudication	t-The claims/line has been paid. vice lacks information which is . At least one Remark Code must be sed of either the Remittance Advice
Number of Claims referenced: 1 Total Charges : \$150.00	
Follow up Note	
Y Follow Up	Archive Print

The PAID report will indicate who the message is from (BLUE BOX). It will also let you know the payer name (PURPLE BOX). The amount of the payment will be on the report as shown in the RED BOX. Once you have reconciled this report click **Archive** at the bottom of the report.

The last report type we'll look at is the ACCEPTED report.

ACCEPTED CLAIMS REPORT	Date: 05/28/2014 11:42:25 AM Page: 1
Provider Name : F	
Patient Name : K	Date of Service : 03/27/2014
Pat. Acct # : W7	Claim Tracking ID: G2
Carrier Trace#: 140	Payer Trace# : 14
Total Charges : \$150.00	Amount Paid : N/A
Message From : PAYER	Report Created : 05/27/2014 16:36:23
Paver Name : 37602 - GOLDEN RULE INSU	
	Receipt-The claim/encounter has been receive RECEIVED. DOES NOT MEAN THAT CLM
-	JUDICATION.:ENTITY ACKNOWLEDGES
RECEIPT OF CLAIM ENCOU	
Number of Claims referenced: 1	
Total Charges : \$150.00	
	-
	-
<	•
Follow up Note	
	A
	<b>.</b>
🔻 Follow Up	Archive Print

This report will let you know that the claim has been accepted by the message from section (BLUE BOX). This may be the clearing house or the payer. It will indicate the payer (PURPLE BOX). The explanation will explain it has accepted and sent on for adjudication.

In general your claims will go through 3 stages of verification. The first will be done by us at our data center. We then send the claim to the clearing house, Change Healthcare. The clearing house will the forward the claim to the insurance company. If a claim is rejected at one of these stages it will not be forwarded on and you will receive a rejection report. If you receive a report from the insurance stating they have accepted the claim, you will need to contact the insurance company for further updates.

## How to Configure Patient Statements to Send Electronically

Helper and ClaimsConnect can be used to send out your patient statements. If you wish to use this service, the statement wil be sent to us through ClaimsConnect. We will them print and mail the statement to client for you. There is a fee for this service and your account will be invoiced based on the number of statements sent each month. Below are the steps to follow to set up this feature.

First you will need to change the billing method in the patient facesheets to electronic statement for the clients. There are several way to do this.

You can edit an individual face sheet or you can use the Update Facesheet Utility to edit all or certain groups of patients (page 50).

Edit an Individual Facesheet:

👉 Helper v8.1.	2: Gregg Ca	almer						
<u>S</u> etup <u>U</u> tilitie	s <u>W</u> eb	Register <u>H</u> el	p E <u>x</u> it					
8	<i>Ş</i>		VISA Maren	<b>₿</b> ≳			. 🇳	
Sche <u>d</u> uler I	MC <u>A</u> uth.	Transactions	<u>C</u> C Ledger	Medications	Billing	ERA	<u>R</u> eports	
Basic Search	Advanced	Search Hide	Patients					
🔽 Last Name	🔽 First Na	me 🛛 📝 Accou	nt # 🛛 📝 SS	SN			Add Face	esheet
3		Sei	arch					
Force column	ns to fit.	Т	o search, clic	k in any column	and begi		Edit Face	esheet
Account #	Last Name	First Name	Provider	Activ .				
В	Calmer	Gregg	Sample Pr	rovider, 🛛 🔽	12/21/197	1 - 4:	Progress	Notes
							Account	Balance

1. Highlight the patient name on you pateint search screen and click **Edit Facesheet** on the right of the screen.

This will display the patient facesheet.

Billing: Gregg Calmer		X
and billing method for each patient a is copied into every new Procedure.	ates ims submission for each insurance company nd responsible party. The preferred method If any of this information <b>does not apply</b> to ge it when you are adding the Procedure.	Facesheet C Patient Info. Additional Resp. Parties Attachments Insurance Info Claim Info.
Calmer, Gregg - Patient Message printed on bill	Superbill 🗸	<ul> <li>Insurance Co.</li> <li>Billing Setup</li> <li>Defaults</li> </ul>
Calmer, Susan - Resp. Party #1 Message printed on bill	Standard bill	<ul> <li>Billing</li> <li>Access Time &amp; Outcomes</li> </ul>

2. On the facesheet screen, click on **Billing** to the right. You will now have a set of tabs at the top of screen. Click on the **How Will We Bill** tab.

Billing: Gregg Calmer	and the second sec	×
and billing method for each patient a is copied into every new Procedure.	ates ims submission for each insurance company and responsible party. The preferred method If any of this information <b>does not apply</b> to age it when you are adding the Procedure.	Facesheet ○ Patient Info. ○ Additional Resp. Parties ○ Attachments Insurance Info ○ Claim Info.
Calmer, Gregg - Patient Message printed on bill	Electronic Statement - Standard	<ul> <li>Insurance Co.</li> <li>Billing Setup</li> <li>Defaults</li> </ul>
Calmer, Susan - Resp. Party #1 Message printed on bill	Procedures only bill Standard bill Standard bill with diagnosis Superbill	<ul> <li>Billing</li> <li>Access Time &amp; Outcomes</li> </ul>
NA - Resp. Party #2 Message printed on bill	Dew statement Electronic Statement - Standard	

3. Next, click on the down arrow to the right of the current billing method. Click on Electronic Statement – Standard from the drop down list.

Billing: Gregg Calmer	and the second sec	×		
and billing method for each patient a is copied into every new Procedure.	ates ims submission for each insurance company and responsible party. The preferred method If any of this information <b>does not apply</b> to age it when you are adding the Procedure.	Facesheet Patient Info. Additional Resp. Parties Attachments Insurance Info Claim Info.		
Calmer, Gregg - Patient Message printed on bill				
Calmer, Susan - Resp. Party #1 Message printed on bill	Standard bill	<ul> <li>Defaults</li> <li>Billing</li> <li>Access Time &amp; Outcomes</li> </ul>		

The patients billing method should now show Electronic Statement – Standard. If you are using responsible parties as the billing party, follow the same steps for them. Once you have selected the new billing method, save the facesheet.

Update Facesheet Utility:

Another way to change the billing methods is to use the Update Facesheet Utility. This will allow you to either change all your billable parties to the Electronic Statements or to select groups a patients to change.

A Helper	v8.1.2: Gregg Calmer	-		- 0 ×
Setup Ut	tilities Web Register Hel	p Exit		
	Topo List Ctrl+T			
Sched	Archive Patients	C Ledger Medications	<u>Billing</u>	A Reports
Basic S	Delete Patients	Patients		
	Update Facesheets			
✓ Last	Calculate Interest	ht # 📝 SSN		Add Facesheet
3 V Forc	Export to Quicken Export to QuickBooks	search, click in any colum	n and begin typing	Edit Facesheet
E Acco	Import Facesheets	Provider Activ	DOB	Progress Notes
	View Audit Log Backup Data			Account Balance

1. From the patient list screen, select **Utilities** at the top. From the drop down list select **Update Facesheets.** 

Update Facesheets
Update Facesheets
Use this wizard to update selected information on the Facesheet for a group of patients.
Select the steps you would like to complete
General patient information
View options for updating patient Library Links, default diagnosis, "Who will be billed" percentages and other general fields. This does not affect any transactions or claims that already exist.
When a Provider leaves the group you can assign those patients to a new Provider.
<ul> <li>When a patient turns eighteen, change the percentage billed to the responsible party to 0%, shifting the charge to the patient.</li> </ul>
✓ Billing methods
view options for up dating the billing method used by each billable party. This affects the Facesheet as well as any transaction on the "Ready to Send" tab of the "Billing Ledger".
<ul> <li>You have decided to begin using SecureConnect and you want to update all patients from using the paper 1500 claim form to SecureConnect.</li> </ul>
Standard fees
View options for updating the standard fee found under the "Billing Setup" section of the Facesheet. This does not affect any transactions that already exist.
<ul> <li>You are doing a yearly increase of \$5 for each Procedure.</li> </ul>
→ <u>N</u> ext <u>C</u> lose

2. On this screen check the box next to Billing Methods and then click Next.

ົບ	pdate Face	sheets		-	-				×
[	Update Facesheets								
ŀ	Use this wizard to update selected information on the Facesheet for a group of patients.								
	P Sele	ct groups of p	patients to u	pdate The	en re	view and refi	ine the list of selected p	patients	
	Select A	ll <u>D</u> es	elect All						
	Drag a col	umn header l	nere to grou	p by that colu	umn				
	Include	Account #	Last Name	First Name	MI	DOB	Provider	Procedure	
	<b>V</b>	В	Calmer	Gregg		12/21/1971	Sample Provider, PhD	90847, Family Psych	otherap
	<b>V</b>	С	Cluff	Jane	s		David Goliath, MD	90806, Individual Ps	ychothe
	Image: Construction of the system         F         Fisher         Judy         E         David Goliath, MD         90806, Individual Psychothe								
	← Prior └→ Next Cose								

3. If you want to update all your patients to the Electronic Statements click **Next**. Otherwise continue to **Option B** (next page).

Update Facesheets	The second secon	×
Update Faces	neets	
Use this wizard to	update selected information on the Face	sheet for a group of patients.
Billing Methods		
	u want to update and their new billing m Insurance and Secondary Insurance. C e updated.	
Billing Party	Billing Method to change to	Insurance Co. matches (optional)
Patient		-
🔲 Resp. Party #1		Ţ
Resp. Party #2		
Primary Insurance		-
Secondary Insurance		-
Additional Secondary	nsurance Option	
Hold claim until the primar	y makes a payment Don't update	•
		← Prior ► NextOose

4. Check the boxes next to all the Billing Parties you want to use the Electronic Statement as their billing method. In the column for **Billing Method to change to**, click the down arrow to the right of the box and select Electronic Statement for the drop down list for each billable party you selected. Do not make any changes to the Insurance company part of this screen. Click **Next**.

Update Fac	esheets 📃
	Update Facesheets Use this wizard to update selected information on the Facesheet for a group of patients.
	ave finished gathering information. If you need to change anything, use the <b>Prior</b> button to go to a previous step. Otherwise, click the button below to update the patients you have selected.
	Update the selected patients    Prior

5. Click **Update the selected patients**. Now all your facesheets are updated.

**Option B** How to change specific groups of patients to the Electronic Statement.

A Helper	/8.1.2: Gregg Calmer				
Setup Ut	ilities Web Register H	elp Exit			
	ToDo List Ctrl+T				Ì
Sched	Archive Patients	C Ledger Medications	Billing	ERA	Reports
	Delete Patients				
Basic S	Update Facesheets 🧹	Patients			
🔽 Last	Calculate Interest	nt # 🔽 SSN			Add Facesheet
В	Export to Quicken	arch			
Forc	Export to QuickBooks	search, click in any colum	nn and begin typir	1g 🛛 🖉	Edit Facesheet
I Acco ► B	Import Facesheets	Provider Activ Sample Provider,	DOB 12/21/1971 -	4. 20	Progress Notes

1. On the patient list screen, click on **Utilities** at the top of the screen. Select **Update Facesheets** from the drop down list.

Update Faceshee	ts
Upd	ate Facesheets
પ્≝≞ Use t	this wizard to update selected information on the Facesheet for a group of patients.
Select the steps	you would like to complete
Genera	I patient information
	ptions for updating patient Library Links, default diagnosis, "Who will be billed" percentages and general fields. This does not affect any transactions or claims that already exist.
	When a Provider leaves the group you can assign those patients to a new Provider.
	<ul> <li>When a patient turns eighteen, change the percentage billed to the responsible party to 0%, shifting the charge to the patient.</li> </ul>
🔽 Billing r	methods
	ptions for updating the billing method used by each billable party. This affects the Facesheet as any transaction on the "Ready to Send" tab of the "Billing Ledger".
	<ul> <li>You have decided to begin using SecureConnect and you want to update all patients from using the paper 1500 claim form to SecureConnect.</li> </ul>
🗖 Standa	rd fees
	ptions for updating the standard fee found under the "Billing Setup" section of the Facesheet. bes not affect any transactions that already exist.
	• You are doing a yearly increase of \$5 for each Procedure.
	► <u>N</u> ext <u>C</u> lose

2. Check the box next to **Billing methods** and then click **Next**.

### Method 1

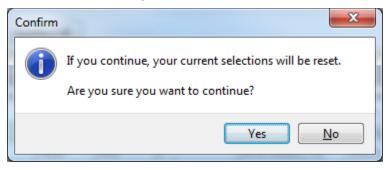
	Updat	te Fa	cesheets		-				×		
		Update Facesheets Use this wizard to update selected information on the Facesheet for a group of patients.									
		Select groups of patients to update Then review and refine the list of selected patients									
		<u>S</u> elec	t All Des	elect All							
	Dr	ag a	column header l	here to group	p by that col	umn					
	Ind	ude	Account #	Last Name	First Name	MI	DOB	Provider	Procedure		
1		$\checkmark$	В	Calmer	Gregg		12/21/1971	Sample Provider, PhD	90847, Family Psychotherap		
			С	Cluff	Jane	s		David Goliath, MD	90806, Individual Psychothe		
		7	F	Fisher	Judy	E		David Goliath, MD	90806, Individual Psychothe		
		7	D	Jenks	Howard			David Goliath, MD	90806, Individual Psychothe		
		V	E	Jones	Marc			David Goliath, MD	90806, Individual Psychothe		
		7	I	One	Test			Sample Provider, PhD	90806, Individual Psychothe		
		V	Р	Paul	John			David Goliath, MD	90847, Family Psychotherap		
	۲ ــــــــــــــــــــــــــــــــــــ										
		<u>■</u> Next <u>C</u> lose									

On this screen you can use **Deselect All** (Blue Box). Then you can select indivdual patient names. Once you have checked the names you want to use the new billing method, click **Next**.

#### Method 2

Update Facesheets									
Update Facesheets Use this wizard to update selected information on the Facesheet for a group of patients.									
_ <b>∑</b> 9 <u>S</u> e	lect groups of [	patients to u	pdate The	en re	view and refi	ine the list of selected (	patients		
<u>S</u> elect	All Des	elect All							
Drag a c	olumn header l	here to grou	p by that colu	umn					
Include	Account #	Last Name	First Name	MI	DOB	Provider	Procedure		
	В	Calmer	Gregg		12/21/1971	Sample Provider, PhD	90847, Family Psychotherap		
	С	Cluff	Jane	s		David Goliath, MD	90806, Individual Psychothe		
	F	Fisher	Judy	Е		David Goliath, MD	90806, Individual Psychothe		
<b>V</b>	D	Jenks	Howard			David Goliath, MD	90806, Individual Psychothe		
	F	lones	Marc			David Goliath MD	90806 Individual Psychothe		

1. Click on Select groups of patients to update.



2. Click Yes on this warning screen.



3. On this screen there are several tabs you can use to define which patients you want to update. For example click on Library Links.

← Select groups of patients		<b>X</b>
Billing Parties Billing Library Links	Dates	
Select patients that have the facesheet.	following <b>library links</b> setup in their	
Select patients with the following		
Account:		
Facility:		
Lawyer:		
Program:		
Referring Source:		
Standard Procedure:		
Provider:		
Insurance:		·······
		Select specific patients
		Clear
		<u>O</u> K
		<u>C</u> ancel

4. You can enter a **Provider** name here and click **OK**.

Update Face	esheets							×	
Update Facesheets Use this wizard to update selected information on the Facesheet for a group of patients.									
<u> </u>	ect groups of p	patients to u	pdate The	en re	view and refi	ne the list of selected p	oatients		
Select	All <u>D</u> es	elect All							
Drag a co	olumn header l	nere to group	o by that colu	nwu					
Include	Account #	Last Name	First Name	MI	DOB	Provider	Procedure		
B Calmer Gregg 12/21/1971 Sample Provider, PhD 90847, Family Psychotherap							y Psychotherap		
<b>V</b>	I One Test Sample Provider, PhD 90806, Individual Psychothe								
	← Prior ► <u>N</u> ext <u>C</u> lose								

5. You are now back to the patient list screen. It will only display the patients that have the provider assigned as their primary provider in the facesheet, then click **Next**.

Update Facesheets	a but have been		-	×
	e Facesheets wizard to update selected information	on the Facesheet for	a group of patients.	
Billing Methods				
Company for t	ng Party you want to update and their he Primary Insurance and Secondary I apany will be updated. Billing Method to chang	nsurance. Only insure		ed
Patient				
Resp. Part	/ #1			
🔲 Resp. Part	/ #2			
🔲 Primary Ins	urance			•••
Secondary	Insurance	-		•••
	econdary Insurance Option	update		
	are primary makes a payment.	opoute		
		<b>→</b> <u>P</u>	rior <u>N</u> ext	Close

6. Check the boxes next to all the Billing Parties you want to use the Electronic Statement as their billing method. In the column for **Billing Method to change to**, click the down arrow to the right of the box and select Electronic Statement for the drop down list for each billable party you selected. Do not make any changes to the Insurance company part of this screen. Click **Next**.

Update Fac	esheets X
	<b>Update Facesheets</b> Use this wizard to update selected information on the Facesheet for a group of patients.
	ave finished gathering information. If you need to change anything, use the <b>Prior</b> button to go to a previous step. Otherwise, click the button below to update the patients you have selected.

7. Click Update the selected patients. Now all your facesheets are updated.

You are now ready to send the Electronic Statements!

### **Sending Patient Statements**

👉 Helper v8.1.2: Gregg Calm	ner		
<u>S</u> etup <u>U</u> tilities <u>W</u> eb Reg	gister <u>H</u> elp E <u>x</u> it		
Scheduler MC Auth. Tra	Reports		
Basic Search Advanced Sea	arch Hide Patients		
✓ Last Name ✓ First Name	Add Facesheet		
Force columns to fit.	To search, click in any co	lumn and begin typing	Edit Facesheet
∃ Account # Last Name	First Name Provider Ac	tiv 🖵 DOB 🗨	
B Calmer	Gregg Sample Provider,	12/21/1971 - 42	Progress Notes

1. Click on Billing at the top of the Patient list.

+ Billing Ledge	er: Gregg C	almer				• X
F	ically	Edit Encoun	Display for current patie	ent only.		
Ready to Send		Closed	Move all paid Procedure		e a Batch of Ch Total Billed	narges BP Ami
1/31/2006	1	Empire Medicare			\$85.00	(m)
2/1/2006		Empire Medicare			\$94.60	\$ •
? Billing Tut	orial			Export Grid Data To	Print	Close

2. Select Print Bills.

7 Bills	4 per 100	
Statements     Electronic Statements	]	<b>Description</b> Send an electronic statement to SecureConnect using Provider information in the letterhead and the credits.
New State	Delete	

3. Under Electronic Statements, select Standard and click Run.

Electronic Statement	×
Standard Send an electronic statement to Secure letterhead and the credits.	Connect using Provider information in the
Select transactions Between: 6/30/2014	Select Current Patient
And: 7/1/2014	Select groups of patients
Today	Letter and the second sec
This Week	Report Layout
This Month	
Last Month	
	Cose <u>Close</u>

4. Choose the date range you want to send the bills for. Now click on **Report Layout**.

Bills: Layout	×
Bills: Layout          General       Messages       Description & Title         Letterhead <ul> <li>Print Provider address</li> <li>Print Facility address</li> <li>Remit To</li> <li>Print Provider address</li> <li>Print Provider address</li> <li>Print Facility address</li> <li>Print Facility address</li> </ul>	Credit card payment options Include credit card payment options? MasterCard/VISA Discover AMEX Billing inquiries Include a billing inquiries phone number? Print Provider phone number
Print a bill for each Patient Responsible Party Only print if the Billable party owes money Transactions to include Only transactions for party being billed All transactions	<ul> <li>Print Provider phone number</li> <li>Print Facility phone number</li> <li>Print other phone number</li> </ul>
Only print Procedures not yet paid.	Save Cancel

5. Use this section to select the options you want to include on the bill and click **Save**.

Electronic Statement	×
Standard Send an electronic statement to Secure letterhead and the credits.	Connect using Provider information in the
Select transactions Between: 6/30/2014	Select C <u>u</u> rrent Patient
And: 7/1/2014	Select groups of patients
Today	
This Week	Report Layout
This Month	
Last Month	

### 6. Click **Preview**.

	Export Electronic Statements to ClaimsConnect					
	This	procedure will	transmit electronic stat	ements from Helpe	r to Claims	sConnect.
	Select All Deselect All View Statement Details					
	Drag	g a column heade				<u>^</u>
	Induc	de Patient	Billable Party	Provider	Balance	
	1	Gregg Calmer	Gregg Calmer	Sample Provider, PhD	\$265.00	E
	<b>V</b>	Gregg Calmer	Susan A Calmer - Resp. #1	Sample Provider, PhD	\$195.00	
1	<b>V</b>	Howard Jenks	Howard Jenks	David Goliath, MD	\$20.00	
	<b>V</b>	Jane S Cluff	Jane S Cluff	David Goliath, MD	\$110.00	
	<b>V</b>	John Paul	John Paul	David Goliath, MD	\$0.00	
		ludy E Eisher	Judy F Fisher	David Goliath, MD	\$0.00	
		_			\$614.88	-
				<u>T</u> ransmit Data Now	8	Print Close

7. Here you can choose to send all the statements or you can uncheck any you wish to send later. Once you have selected the patients to send, click **Transmit Data Now**.

ClaimsConnect Login		×
Netsmart Claims	Connect	Login
	ame and Password the ClaimsConnect. This rname and Password.	
ClaimsConnect, avoidi automatically log into o turned on in Setup, Pl	lity to automatically log y ng this screen. To allow ClaimsConnect you must <i>references, General, Fea</i> assword setup in both Ho	Helper to have Passwords <i>tures</i> and have the
Username Password	<u> </u>	
	<u>o</u> k	Cancel

8. Login to ClaimsConnect.

Update Results		100.000	-
Items Sent Claims: Statements:		Items Sent represents the o were sent to the Data Center	
<b>Items Receiv</b> Mail: Reports:	0	Items Received represents received from the Data Center sent in previous sessions.	
Claims Accep	ted/Rej	ected	
Accepted: Rejected:		Claims Accepted/Rejected on reports received in this sess claims sent in previous sess	sion, which refer to
	R	eview results in ClaimsConnect	

9. This screen will confirm the amount of Statements that were sent. In this case two were sent. Click Review results in **ClaimsConnect**.

ClaimsConnect				-	
<u>File</u> <u>Search</u> Settings <u>T</u> ools	<u>H</u> elp				
2 🖺 🖄 🚔 😤 🗡	1	🛆 🔘	🖬 Sho	w items imported from	to 07/01/2014 ▼ Apply
Folders		Activ	ve Items\Nev	v This Session\	
🔺 🛅 Active Items [2127]				Patient Name	
New This Session [5]		🔆 💱	🖥 Calmer, Gregg	,	\$265.00
Follow Up [262]		🔆 🕺	🗿 Calmer, Gregg	,	\$195.00
▷ · Claims [2060] ▷ · Claims [2060]		- <b>X</b>		U6272340.rmt	\$0.00 7/1/2014
P → Beports [3]		🔆 🕻	💈 MonthlySum	maryJun-14.rmt	\$0.00 7/1/2014
Notifications [30]		🔆 🛙	062714419_	1.rpt	\$0.00 6/23/2014
Archived Items [24630]					

10. This screen will verify that the statements were sent.

## **Claim Status Icon Definitions**

The following claim status icons are available in ClaimsConnect to indicate the current status of each claim:

= -	
	1
	=

This is the default status when a claim is initially imported into ClaimsConnect and reflects that the claim has not been submitted to the clearinghouse.



ClaimsConnect checks the format of the imported claim using some basic validation rules. If any validation errors are found, this status will be assigned. You need to correct these claims and re-import them through your practice management system.

**Note:** All client-side edits can be overridden (by using the right-click menu) to allow the claim to be submitted to the clearinghouse regardless of the errors found.



This status indicates the claim has been submitted to the ClaimsConnect Data Center, but no status has been received by the Data Center.



After the ClaimsConnect Data Center receives the claim, additional validation rules are checked. If any of these errors are found, the Data Center will return this status and the claim will be rejected.

**Note:** Data Center rejections cannot be overridden. These claims must be corrected and resubmitted from the respective practice management system.



When the ClaimsConnect Data Center validates the claim and finds no errors, the claim is sent to the payer and the claim is assigned this status.



A new function within the ClaimsConnect Client is the option to submit a Claim Status transaction to check the status of the corresponding claim. When a Claim Status transaction is created, this status is assigned to the claim indicating ClaimsConnect is waiting to receive the Claim Status response.



The claim will receive this status if the Claim Status request is rejected for any reason. Reasons for the Claim Status rejection can be viewed by reviewing the claim detail.



These claims have been paid by the payer. Claims can be marked as Paid either as a result of a Status Request or manually through ClaimsConnect. After the claim has been paid, the claim is given a "Paid" status.

**Note**: The only way ClaimsConnect can recognize that a claim has been paid is through an Electronic Remittance Advice transaction. If the user is not processing ERA transactions, ClaimsConnect will leave the status as "Claim In Progress" but the status can be updated manually using the right-click menu.

# **Useful Links**

If you need to reinstall your ClaimsConnect software use this link. <u>http://support.helper.com/down/upgrade/action.jsp?file\_name=SCCUP</u> For further documents about ClaimsConnect <u>http://www.helper.com/client-center/client-support/</u>