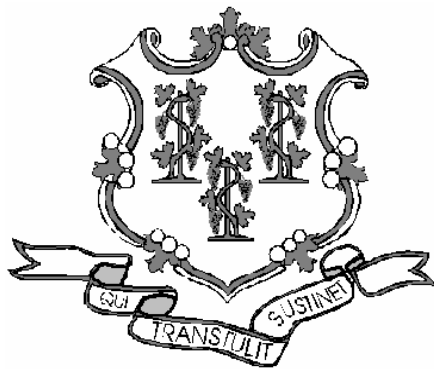




# Connecticut Department of Social Services

*Caring for Connecticut*



## CT Provider Electronic Solutions

Presented by

The Department of Social Services  
& EDS for Billing Providers

# Agenda Provider Electronic Solutions for Experienced User

- *Trading Partner Agreements*
- *Tips*
- *Make the most of the software*
  - *Creating and Submitting review*
- *Understanding the 997*
- *Database Management*
- *Q & A*
- *Demonstration*

# Web site for TPA

*Update your Trading Partner Agreement on  
the EDS Web site*

[www.ctdssmap.com](http://www.ctdssmap.com)

- From the EDS home page click:*
  - Provider/ Secure Site*
  - Trading Partner*
  - Trading Partner Enrollment Profile*
    - » Update data appropriately*
    - » Fax copy to EDI*
    - » 860-269-2027 attn: Jennifer*

# Updating the Trading Partner Agreement

- *Adding or removing providers*
- *Adding new transaction*
- *Changing contact information*
  - *Also important to keep the correct contact information on the Tools/ Options/ Batch tab in Provider electronic Solutions Software*

# Testing for added transactions

## ***Provider must:***

- ***Submit a test to EDS for new transactions***
- ***Retrieve the 997 Functional Acknowledgment***
  - *Your 997 must indicate an successful (accepted) transmission*
- ***Fax a copy of the 997 showing a successful (accepted) transmission to EDS***
  - » *(1)860-269-2027 Attention: Jennifer*
  - » *Include the TP ID, File tracking number and type of file that is being tested*
- ***Receive confirmation from EDS for production approval***
  - *Must change options tabs in the Provider Electronic Solutions software from a test to production environment*

# Tips

- *Tips*
  - *Help*
  - *Calculator*
  - *Icons*
  - *Windows*

# TIPS for Provider Electronic Solutions

- *Using Help*
  - *Form help*
  - *F1*
  - *Index - complete electronic users manual at your finger tips*
  - *Calculator*
  - *Icons*
  - *Windows*

# Form Help

## • Example - Help Contents Forms 837 Institutional Inpatient

**837 Institutional Inpatient**

The 837 Institutional Inpatient form is based on the ANSI ASC X12N HIPAA Transaction. The form allows you to submit claims for inpatient institutional services, Third Party Payer Claims, Crossover Claims, Adjustment and Voids.

Once you have filled out the information on the screens, you submit the completed form in a batch. For information on how to submit a batch of forms, refer to [Submission](#).

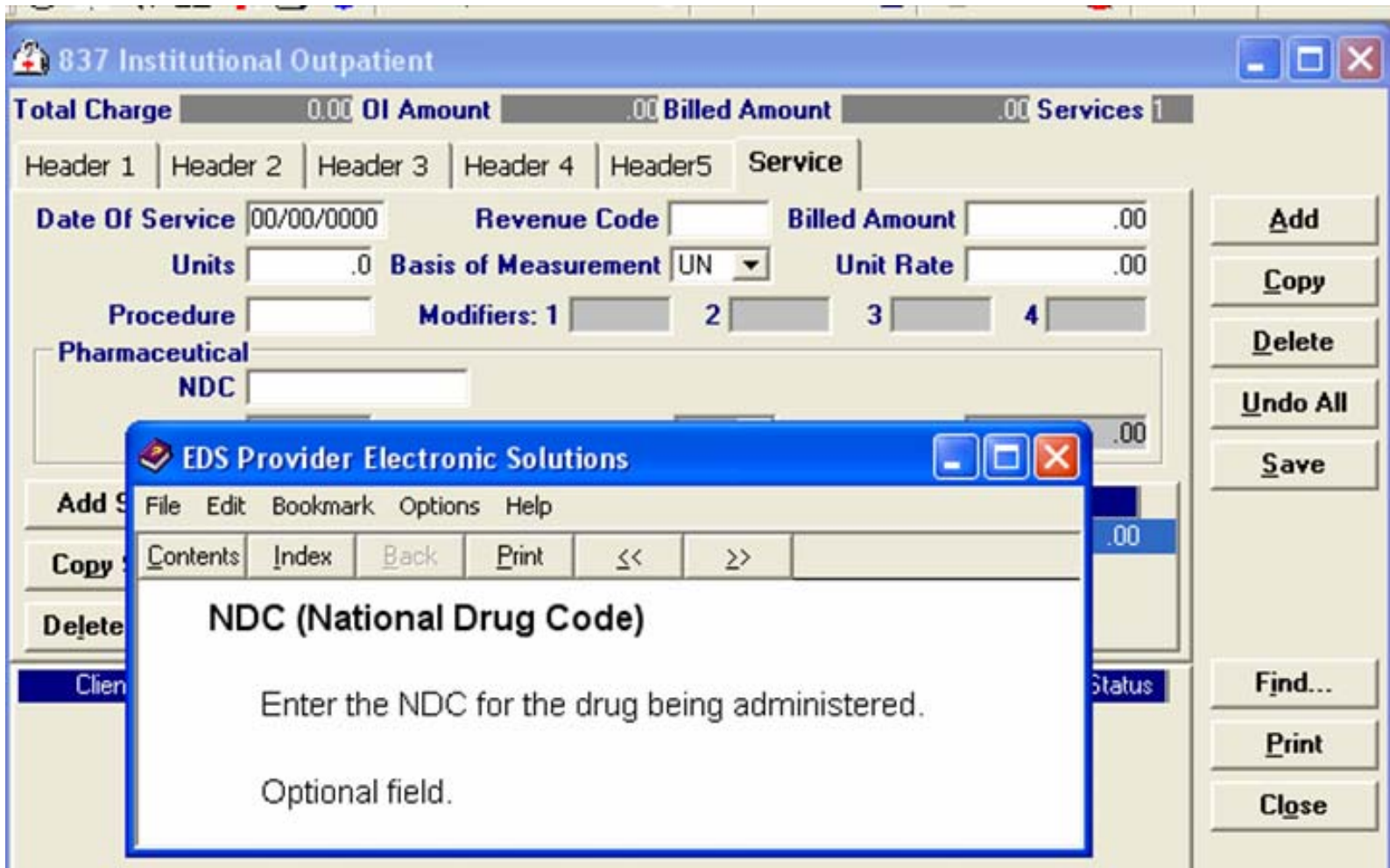
The form is divided into five Header tabs, Other Insurance tab, Crossover tab and one Service tab. Listed below are the fields on each tab. Click on the field name to see a description of the field.

| <u>Header 1</u>          | <u>Header 2</u>              | <u>Header 3</u>                       |
|--------------------------|------------------------------|---------------------------------------|
| Type Of Bill             | Diagnosis Codes              | Occurrence Codes/Dates (1-8)          |
| Original Claim #         | Primary                      | Occurrence Span Codes/Dates (1:2)     |
| Provider ID              | Other (1-8)                  | Condition Codes (1-7) (Institutional) |
| Taxonomy Code            | Admit                        | Covered (Days)                        |
| Last/Org Name            | E-Code                       | Non-Covered (Days)                    |
| Client ID                | Surgical                     | Coinsurance                           |
| Account #                | Qualifiers/Codes/Dates (1-5) | Lifetime Reserve                      |
| Last Name (Client)       | SSN/Tax ID (Attending)       |                                       |
| First Name (Client)      | Last/Org Name (Attending)    |                                       |
| MI (Client)              | First Name (Attending)       |                                       |
| Patient Status           |                              |                                       |
| Medical Record #         |                              |                                       |
| From DOS                 |                              |                                       |
| To DOS                   |                              |                                       |
| Prior Authorization      |                              |                                       |
| Release of Medical Data  |                              |                                       |
| Benefits Assignment      |                              |                                       |
| Report Type Code         |                              |                                       |
| Report Transmission Code |                              |                                       |
| Attachment Control       |                              |                                       |

Header 4                      Header 5

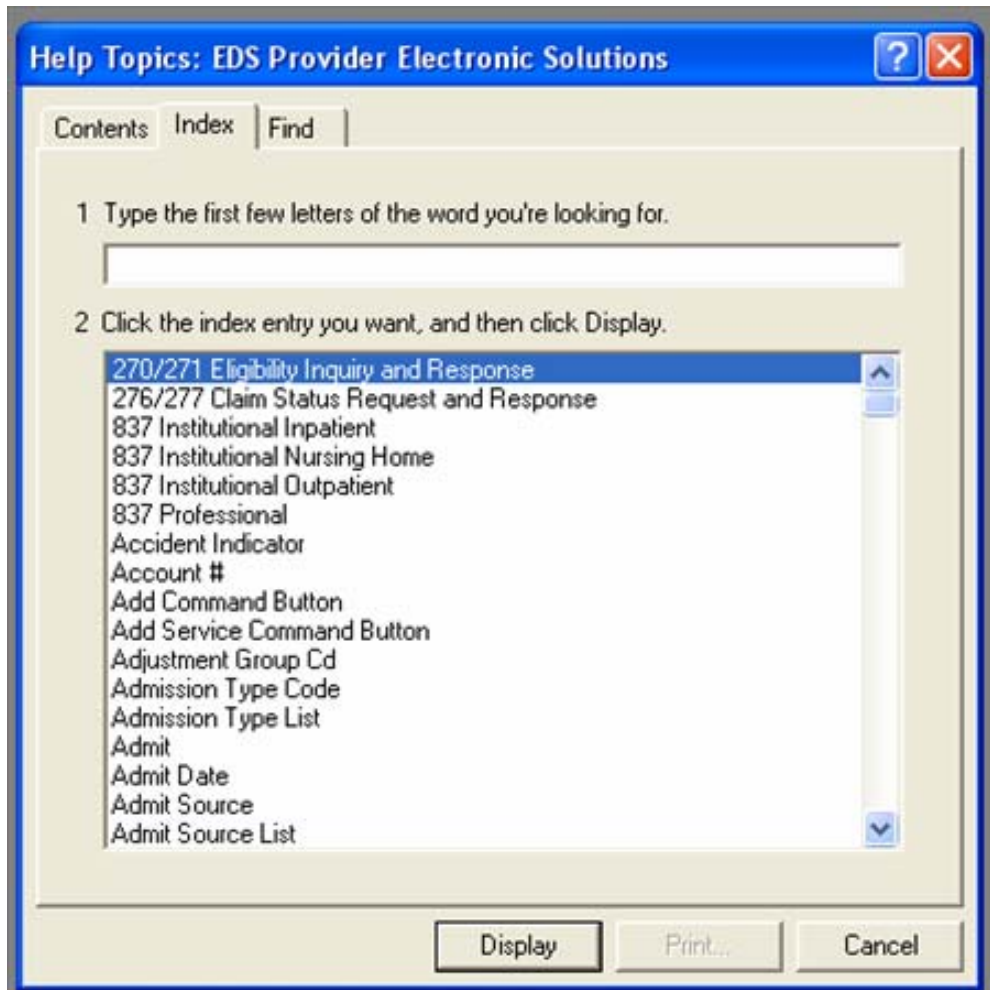
# Accessing and using Help

- F1 example

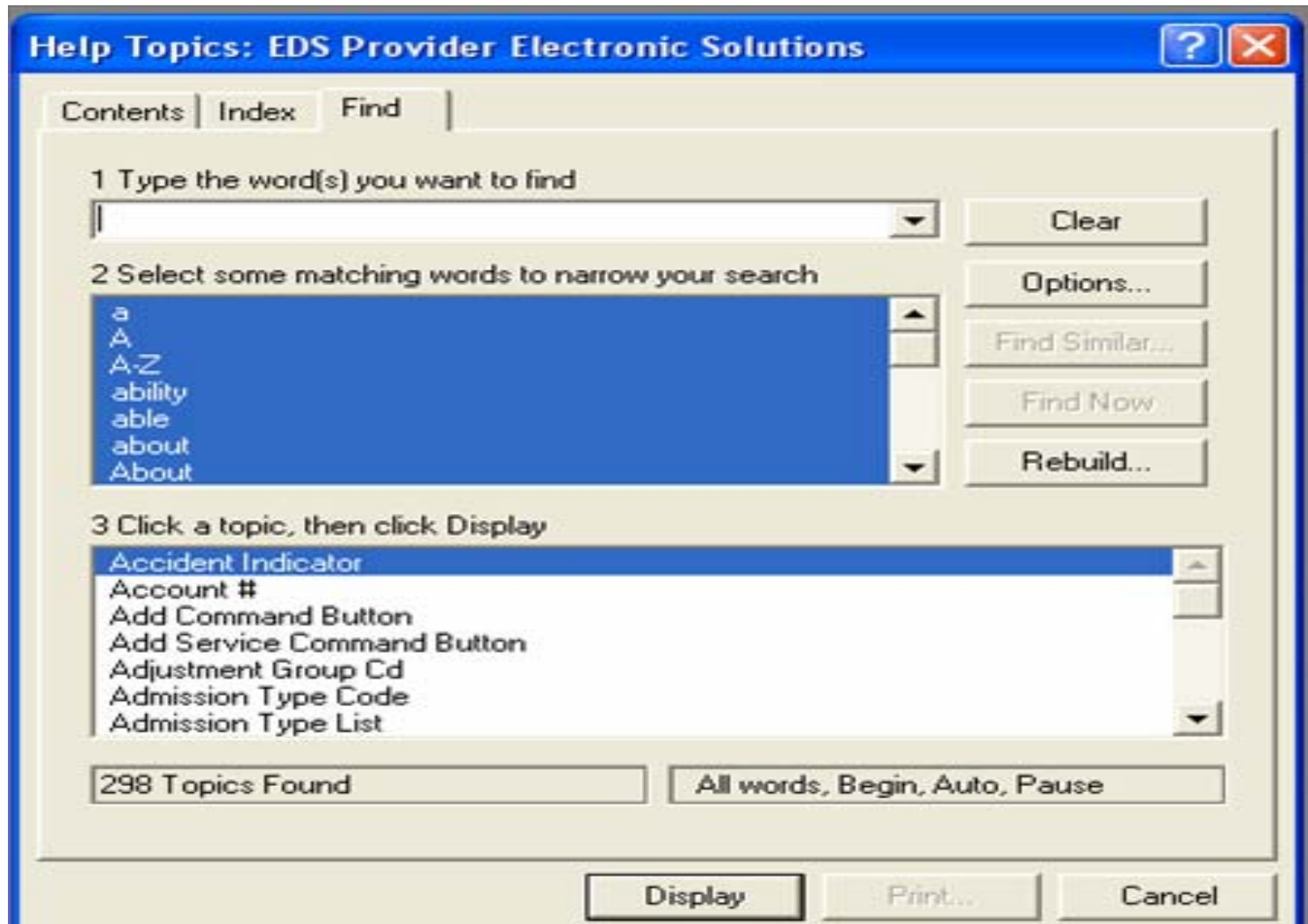


# Index Help

- Type key word to search for index help

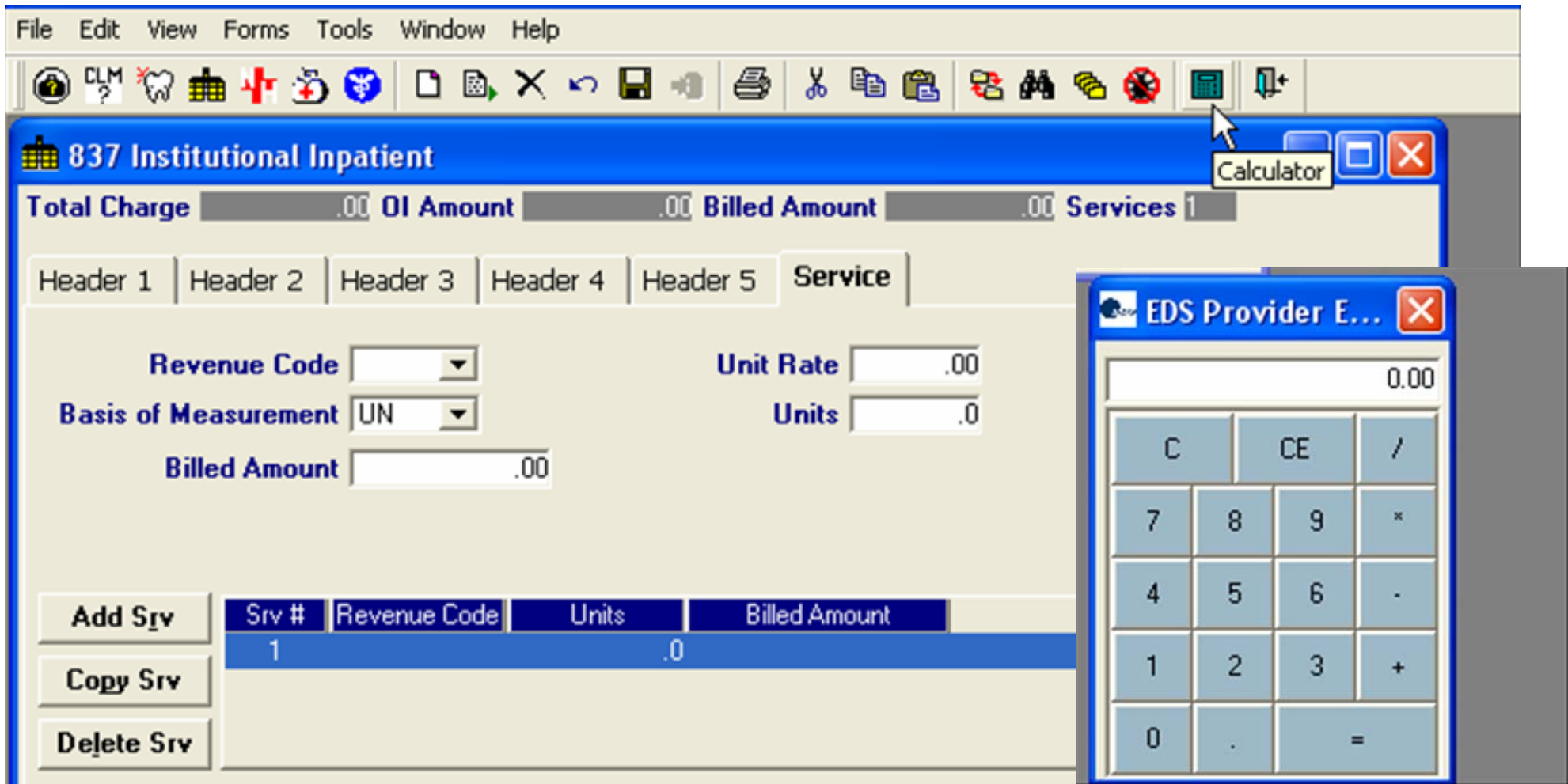


# Using the Find option in Help



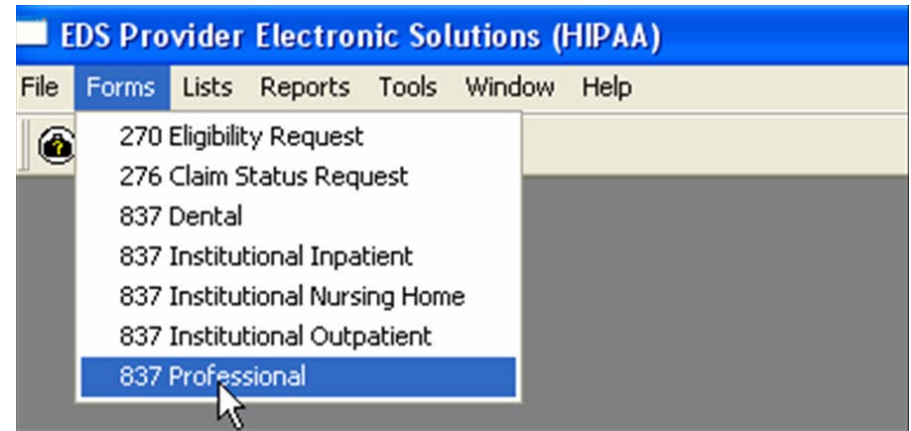
# Calculator

- Displays in the software when on clam forms



# ICONS

- ICONS save time
- Two clicks or one for claims?



# Using Windows

Windows based software makes easy viewing and access

- You can use Windows within the software
- Toggle to other programs while the software is open

# Windows within software

EDS Provider Electronic Solutions (HIPAA)

File Edit View Forms Lists Tools Window Help

837 Professional

Total Charge  OI Amount  Billed Amount  Services

Header 1 | Header 2 | Header 3 | Service 1 | Service 2 | Service 3

Claim Frequency  Original Claim #

Provider ID  Taxonomy Code

Last/Org Name  First Name

Client ID  Account #

Last Name  First Name  MI

Medical Record #  Patient Signature

Release of Medical Data  Benefits Assignment  Report Type Code

Report Transmission Code  Attachment Cit

Billing Provider

Provider ID  Provider ID Code Qualifier

Taxonomy Code  Entity Type Qualifier

Last/Org Name  First Name

SSN / Tax ID  SSN / Tax ID Qualifier

Provider Address

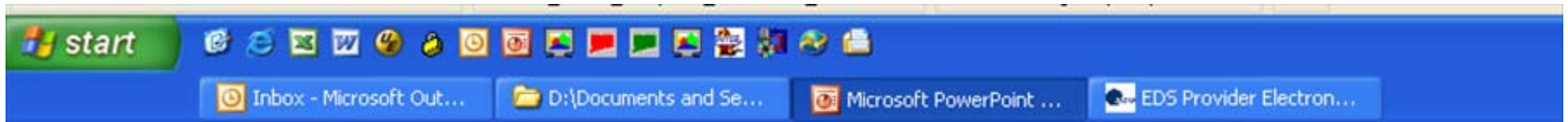
Line 1  Line 2

City  State  Zip

| Provider ID | Taxonomy   | Last/Org Name | Type Qualifier |
|-------------|------------|---------------|----------------|
| 1124131632  | 2610E0800K | CENTRAL CT    | 2              |

# Windows on Computer

- Leave the software open and go back and forth from one application to another
- Minimize and Maximize



# Making the most of the software

- *Networking or Not*
- *Creating Claims with other payer data*
- *Clean Claims*
- *Claim Adjustments*
- *Eligibility Verification*
- *Claim Status*

# Network Installation

- **Network Installation**

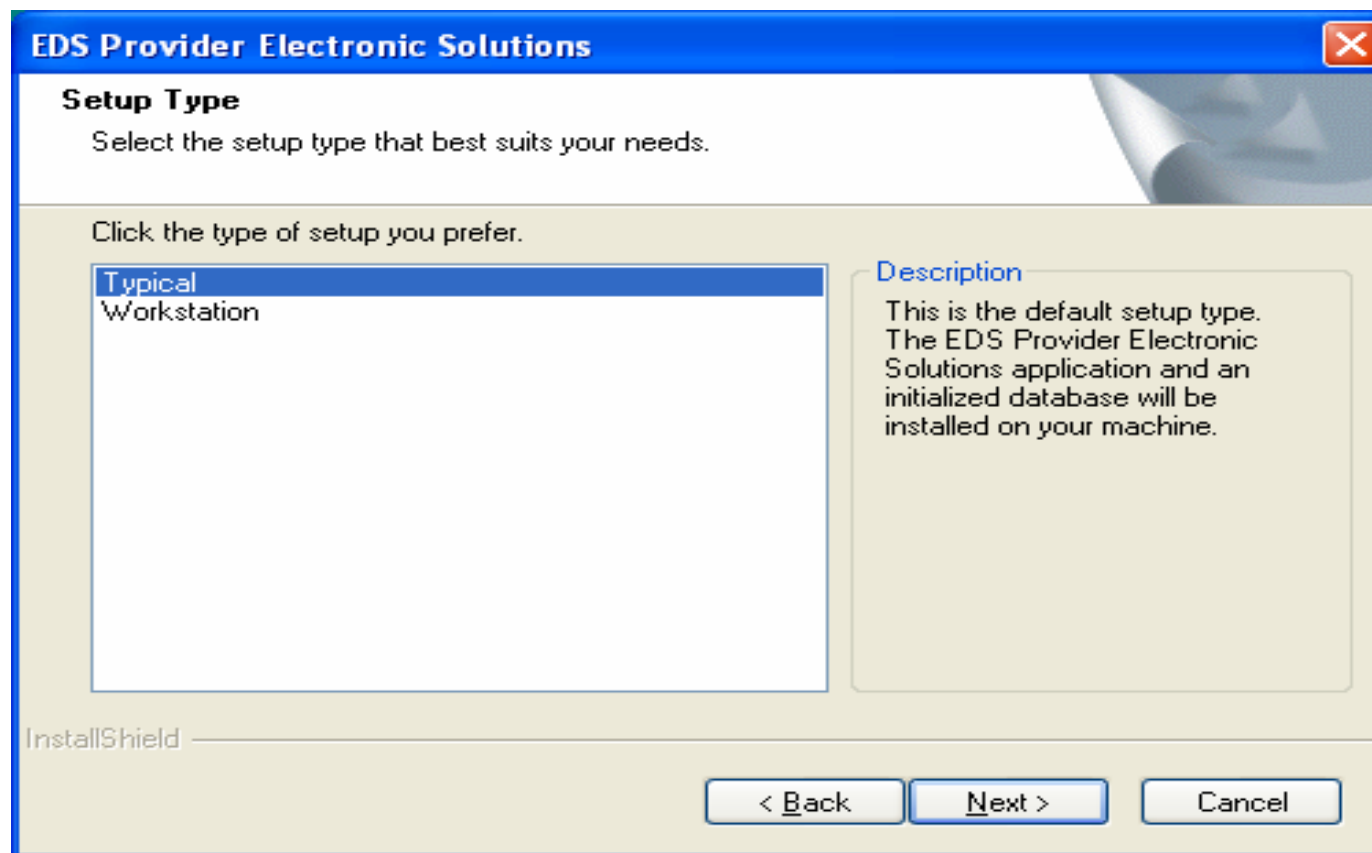
- To install the application for use by several users, you will need to perform a network installation. For a network installation, the Provider Electronic Solutions database can reside on the server and the Provider Electronic Solutions application can be installed on individual computers. You can install Provider Electronic Solutions on as many computers as needed.
- The following instructions will install the shared Provider Electronic Solutions database on a network and the application on a computer.
- Before you begin the installation, create a target directory on your network to hold the Provider Electronic Solutions database.
- Follow procedures 1 through 5 of the installation instructions for a standalone computer. When prompted for the type of installation you want (Step 6), select **Typical** on the first computer. This will be the primary computer and will need to be upgraded first when upgrading the Provider Electronic Solutions software.
- Select a target folder on the computer's C:\ drive or accept the default directory for the Provider Electronic Solutions application.
- Select a target folder (i.e., a shared network folder or another disk) for the Provider Electronic Solutions database. Click **Next**.
  
- **Tip** Make a note of the installation location for the Provider Electronic Solutions database; future computer installations will need to refer to this location.
- A pop-up box displays to note the database destination folder for future workstation setups. Click **OK**.
- When the installation is complete, click the **Finish** button to exit the installation.

- **Installation on Individual Computers on a Network**

- Follow steps 1 through 5 of the installation instructions for a standalone computer.
- When prompted to select the type of installation (step 6), select **Workstation** and select **Next**.
- Click **Next** to accept the default destination for the software.
  
- 4. Click **Browse** to select the target directory on the network in which you wish to locate the database. Click **OK**.
- 5. When the installation of the database on the network is complete, click on **Finish** to exit the installation.
- You will need to perform Steps 1 through 6 on every workstation.

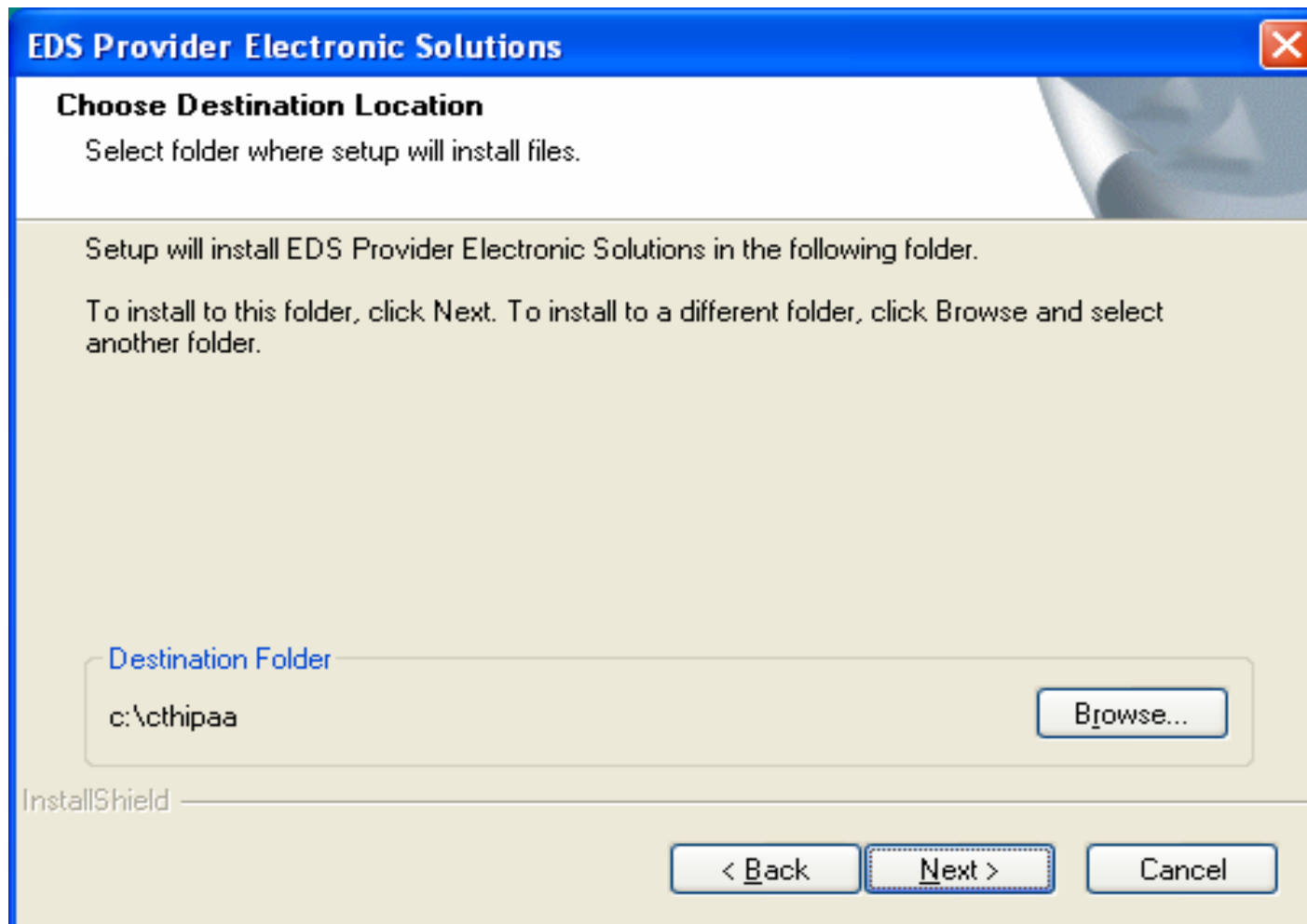
# Networking the software or not?

- Determine if you will be networking the software or using on independent computers



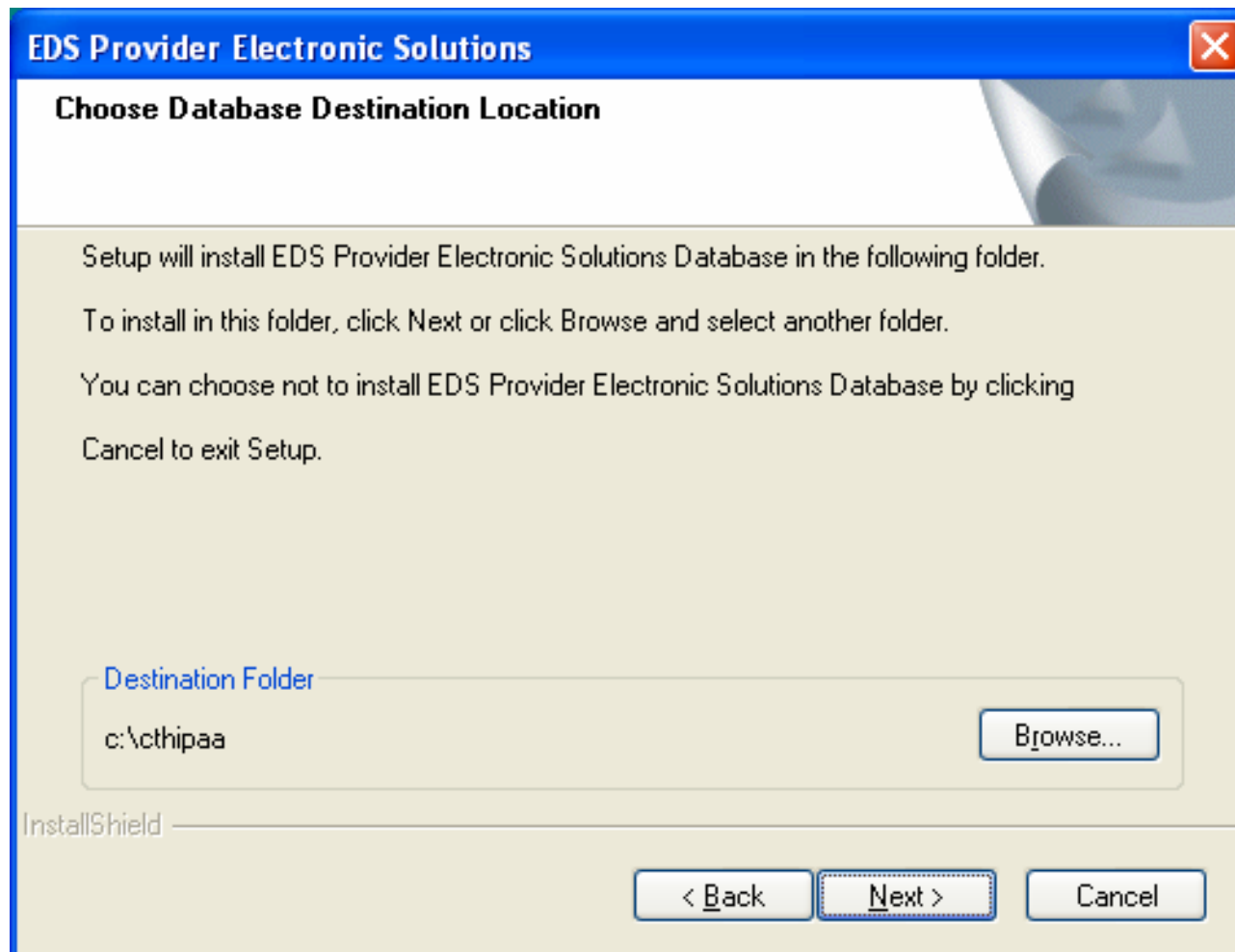
# Installing the program files

- This steps adds the program files

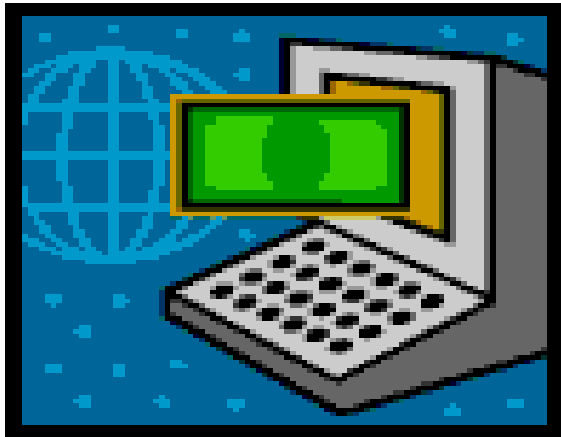


# Installing the database

- This step installs the database or points to where the Database has already been installed



# Creating and Submitting Review



# ***TPL and Medicaid Claims***

***Obtain disposition from other payer/s***

***Add Policy Holder to List***

***File to Medicaid indicating TPL payment/denial***

***Header 5 Tabs for Inpatient , Outpatient and Home  
Health***

***Header 3 Tab on Professional and Dental***

***Other insurance indicator and OI tab Appears***



# OI tab

837 Professional

Total Charge 200.00 OI Amount 50.00 Billed Amount 150.00 Services 1

Header 1 | Header 2 | Header 3 | **OI** | Service 1 | Service 2 | Service 3

Release of Medical Data  Benefits Assignment Y Patient Signature B

Claim Filing Ind Code CI Adjustment Group Cd CO

| Reason Codes/Amts:1 |            |       |   |  |     |
|---------------------|------------|-------|---|--|-----|
| 019                 | 150.00     | 2     |   |  | .00 |
| Paid Date/Amount    | 11/01/2007 | 50.00 | 3 |  | .00 |

Policy Holder

Group # ASGNN11 Group Name Carrier Code 003

Last Name GRANNY First Name MY

| Srv # | Carrier Code | Group # | Group Name | Last Name |
|-------|--------------|---------|------------|-----------|
| 1     | 003          | ASGNN11 |            | GRANNY    |

Add OI Copy OI Delete OI

Add Copy Delete Undo All Save

# Medicare Paid and Medicaid Claims

**Obtain disposition from Medicare (EOMB)**

**Add Policy Holder to List**

**File to Medicaid indicating Medicare  
payment or denial**

*Header 5 Tabs for Inpatient , Outpatient and Home  
Health*

*Header 3 Tab on Professional*

*– Crossover Indicator and Crossover Tab appears  
or Crossover information is Enabled*



# Crossover Tab

837 Institutional Inpatient

Total Charge .00 OI Amount .00 Billed Amount .00 Services 1

Header 1 | Header 2 | Header 3 | Header 4 | Header 5 | **Crossover** | Service

Release of Medical Data  Y Benefits Assignment  Y Claim Filing Ind Code MA

Medicare Provider

Rendering ID Last/Org Name

Medicare ICN 12345678911121 Paid Amount 7,655.44 Paid Date 04/10/2008

Amounts

Allowed 1,024.00 Deductible .00 Coinsurance 1,024.00

Add  
Copy  
Delete  
Undo All  
Save

# Professional Crossover Tab and Service 3

The screenshot displays the '837 Professional' software window. At the top, the title bar reads '837 Professional'. Below the title bar, there are summary fields: 'Total Charge' with a value of '.00', 'OI Amount' with a value of '.00', 'Billed Amount' with a value of '.00', and 'Services' with a value of '1'. The main area is divided into tabs: 'Header 1', 'Header 2', 'Header 3', 'Crossover', 'Service 1', 'Service 2', and 'Service 3'. The 'Service 3' tab is currently selected. On the right side of the window, there are several buttons: 'Add', 'Copy', 'Delete', 'Undo All', and 'Save'. The 'Service 3' tab contains two sections: 'Pharmaceutical' and 'Medicare Amount'. The 'Pharmaceutical' section includes a dropdown menu for 'NDC Code', a 'Units' field with a value of '.000', a dropdown menu for 'Basis for Measurement', and a 'Unit Price' field with a value of '.00'. The 'Medicare Amount' section includes 'Allowed' and 'Paid' fields, both with a value of '.00', and 'Deductible' and 'Coinsurance' fields, both with a value of '.00'.

# Federal Deficit Reduction Act

DRA Effective July 1, 2008

Claim filing changes for Outpatient claims

Reminder for filing Professional claims

# DRA Outpatient Claim Filing

- 11 digit NDC code (zero fill rules – 5-4-2)
- Rev 250-253, 258-259, and 634-637 require HCPCS

# DRA Professional Claim Filing

- Applicable is S, J or Q Series of Procedure codes billed
- 11 digit NDC code (zero fill rules – 5-4-2)

# Claim Adjustments

- ***How do I correct a previously submitted claim?***
  - ***Click and copy the initial claim record***
    - ***(F status). Claim must have already be paid by EDS.***
  - ***Change the frequency code to:***
    - ***7 – to adjust a prior claim***
    - ***8 – to recoup a prior claim***

# Claim Replacement

- *To correct a previously submitted claim (cont.)*
  - *Enter the ICN of the claim to be replaced in the Original Claim Number Field (Header 1 Tab)*
- *Replacements*
  - *Make changes to details as required*
  - *Claim must contain the details you need processed*

# Recurring Claim Submission

*To submit claims for on going services*

- Communication*
- Resubmission*
- Copy Batch*
- Add/delete and change claims for your next claim submission*

# Eligibility Verification Inquiry

- How do I use Provider Electronic Solutions Software to Prepare an Eligibility Verification Inquiry?
- Select the eligibility icon (far left)  
or
- Select Forms → 270 Eligibility Request

# Prepare and Submit Eligibility Request and Response

Complete Header 1 & 2 Tabs

*When you are ready to submit your inquiry to EDS select:*

- *Communication*
- *Submission*
- *Files to Send*
  - *270 Eligibility Request*
- *Submit*

# Confirmation of File Receipt to EDS

- *How do I retrieve a 271 Eligibility Response using Provider Electronic Solution software?*
- *Communication*
  - *Submission*
  - *Files to Receive*
    - *271 Eligibility Response*
  - *Submit*
  - *Close*
- *How do I view the 271 Eligibility Response?*
  - *Communication*
  - *View Batch Response*
- *Find Clients not Eligible?*
  - *Communication*
  - *View Batch Response*
  - *Select 271 with responses*
  - *Find – Benefit Information:*     6

# Claim Status Inquiry

- How do I use Provider Electronic Solutions Software to Prepare a Claim Status Inquiry?
- Select the **CLM** icon  
?

or

- Select Forms → 276 Claim Status Request

# Claim Status Inquiry Cont.

Complete Tab 1 & 2

*When you are ready to submit your inquiry to EDS select:*

- Communication
- Submission
- Files to Send
  - 276 Claim Status Request
- Submit
- Close

# Claim Status Inquiry Response

- *How do I retrieve a 277 Claim Status Response using Provider Electronic Solution software ?*
- *Communication*
  - *Submission*
  - *Files to Receive*
    - *277 Claim Status Response*
  - *Submit*
- *How do I view the 277 Claim Status Response?*
  - *Communication*
  - *View Batch Response*

# Understanding the 997

- *Understanding the 997*
  - *Correctly correlating the file with the submitted file*
  - *correcting the rejected file*

# The functional acknowledgment - 997

*How do I confirm on my 997 Functional Acknowledgement that my electronic file was accepted by EDS?*

***Accepted 997:***

***AK5\*A***

***AK9\*A***

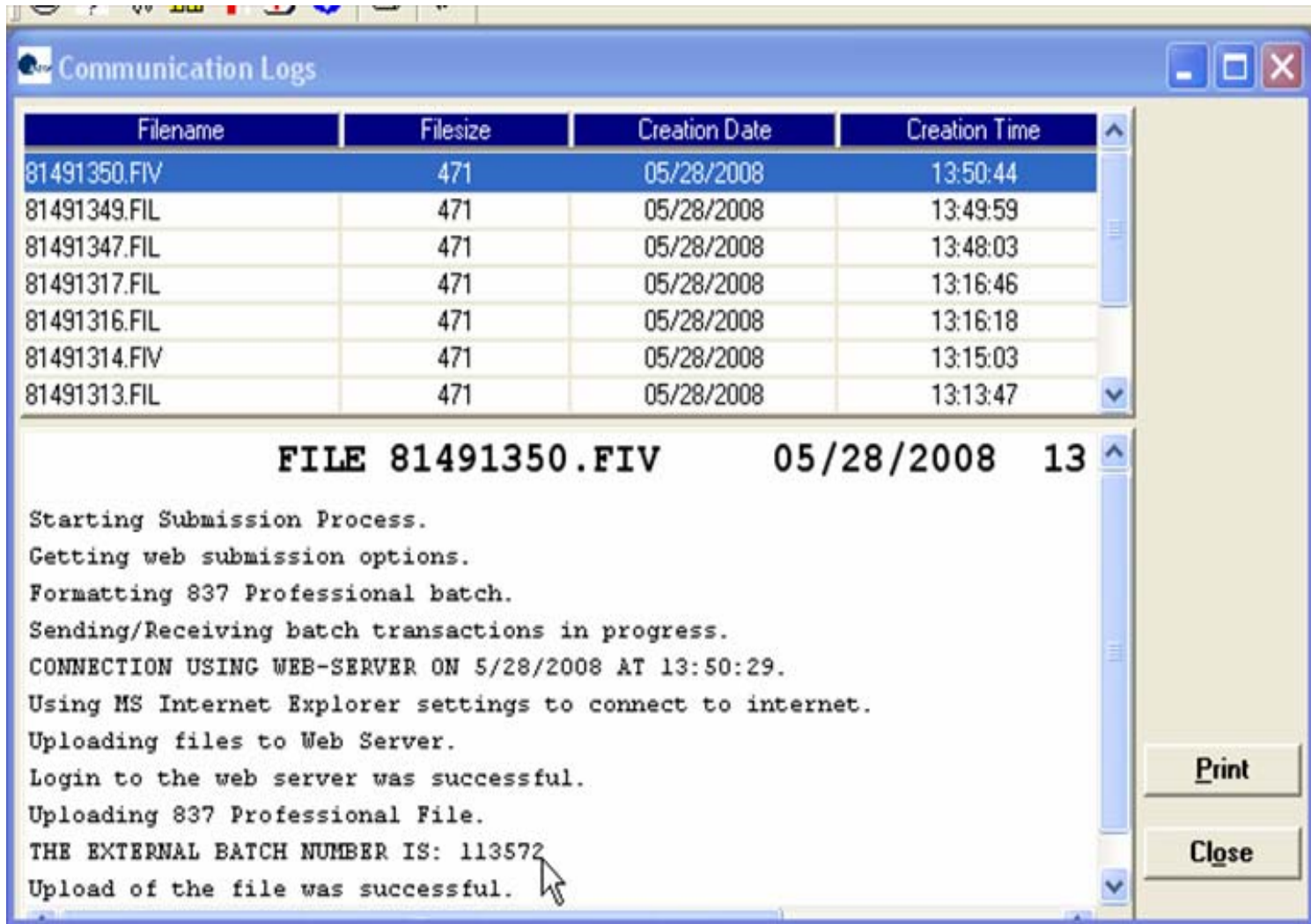
***Rejected 997:***

***AK5\*R***

***AK9\*R***

Note: Providers should refer to their "How to Read a 997 Functional Acknowledgment" document for details concerning 997 rejections

# Correlating input file with 997 file



The screenshot shows a window titled "Communication Logs" with a table of files and a detailed log for the selected file, 81491350.FIV.

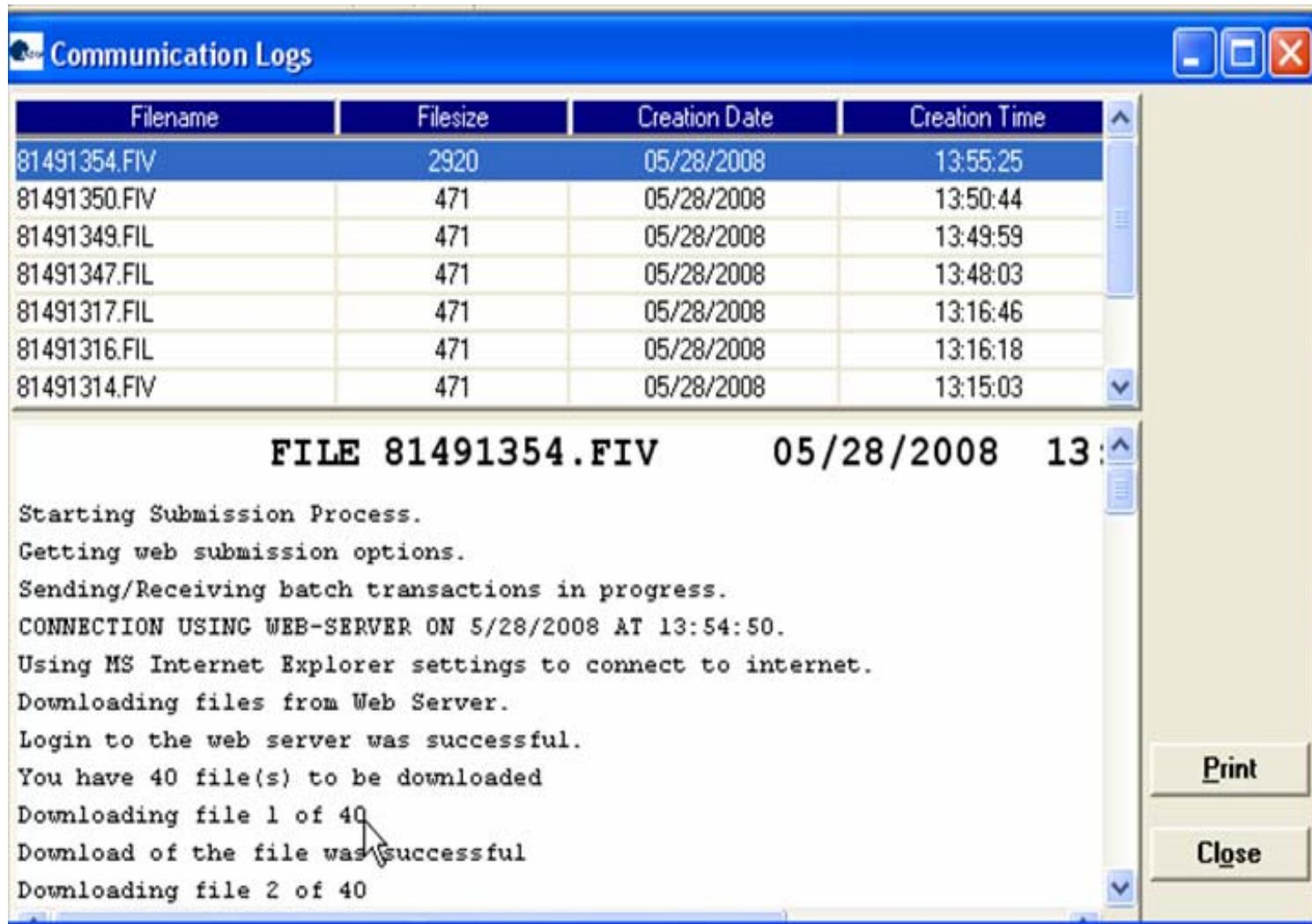
| Filename     | Filesize | Creation Date | Creation Time |
|--------------|----------|---------------|---------------|
| 81491350.FIV | 471      | 05/28/2008    | 13:50:44      |
| 81491349.FIL | 471      | 05/28/2008    | 13:49:59      |
| 81491347.FIL | 471      | 05/28/2008    | 13:48:03      |
| 81491317.FIL | 471      | 05/28/2008    | 13:16:46      |
| 81491316.FIL | 471      | 05/28/2008    | 13:16:18      |
| 81491314.FIV | 471      | 05/28/2008    | 13:15:03      |
| 81491313.FIL | 471      | 05/28/2008    | 13:13:47      |

**FILE 81491350.FIV      05/28/2008    13**

```
Starting Submission Process.
Getting web submission options.
Formatting 837 Professional batch.
Sending/Receiving batch transactions in progress.
CONNECTION USING WEB-SERVER ON 5/28/2008 AT 13:50:29.
Using MS Internet Explorer settings to connect to internet.
Uploading files to Web Server.
Login to the web server was successful.
Uploading 837 Professional File.
THE EXTERNAL BATCH NUMBER IS: 113572
Upload of the file was successful.
```

Buttons: Print, Close

# Correlating input file to 997 Cont'd



The screenshot shows a window titled "Communication Logs" with a table of files and a detailed log for the selected file.

| Filename     | Filesize | Creation Date | Creation Time |
|--------------|----------|---------------|---------------|
| 81491354.FIV | 2920     | 05/28/2008    | 13:55:25      |
| 81491350.FIV | 471      | 05/28/2008    | 13:50:44      |
| 81491349.FIL | 471      | 05/28/2008    | 13:49:59      |
| 81491347.FIL | 471      | 05/28/2008    | 13:48:03      |
| 81491317.FIL | 471      | 05/28/2008    | 13:16:46      |
| 81491316.FIL | 471      | 05/28/2008    | 13:16:18      |
| 81491314.FIV | 471      | 05/28/2008    | 13:15:03      |

**FILE 81491354.FIV      05/28/2008    13:**

Starting Submission Process.  
Getting web submission options.  
Sending/Receiving batch transactions in progress.  
CONNECTION USING WEB-SERVER ON 5/28/2008 AT 13:54:50.  
Using MS Internet Explorer settings to connect to internet.  
Downloading files from Web Server.  
Login to the web server was successful.  
You have 40 file(s) to be downloaded  
Downloading file 1 of 40  
Download of the file was successful  
Downloading file 2 of 40

Buttons: Print, Close

# The right 997

The screenshot shows a window titled "View Batch Response" with a table of files and a text area containing a HIPAA batch response dump. The table has columns for Filename, Filesize, Creation Date, and Creation Time. The text area shows a dump starting with "-----beginning-of-997-dump-----" and ending with "-----end-of-997-dump-----". The dump content is as follows:

```
-----beginning-of-997-dump-----  
ISA*00*          *00*          *ZZ*445498161    *ZZ*100000013  
5*U*00401*000000053*0*T*:~GS*FA*445498161*100000013*20080528*13550  
0~ST*997*84001~AK1*HC*337~AK2*837*000000001~AK5*A~AK9*A*1*1*1~SE*6  
~IEA*1*000000053~  
-----end-of-997-dump-----
```

| Filename                  | Filesize | Creation Date | Creation Time |
|---------------------------|----------|---------------|---------------|
| 113573_113572_45A6CE7B_9E | 257      | 05/28/2008    | 14:49:02      |
| 100846_100844_07C0528C_99 | 263      | 05/28/2008    | 13:55:25      |
| 85665_85663_1F3FD3B5_997x | 257      | 05/28/2008    | 13:55:24      |

**HIPAA - Batch Response**

-----beginning-of-997-dump-----  
ISA\*00\* \*00\* \*ZZ\*445498161 \*ZZ\*100000013  
5\*U\*00401\*000000053\*0\*T\*:~GS\*FA\*445498161\*100000013\*20080528\*13550  
0~ST\*997\*84001~AK1\*HC\*337~AK2\*837\*000000001~AK5\*A~AK9\*A\*1\*1\*1~SE\*6  
~IEA\*1\*000000053~  
-----end-of-997-dump-----

Find  
Print  
Close

# View Batch Response Accepted

The screenshot shows a software interface for EDS Provider Electronic Solutions (HIPAA). The main window is titled 'View Batch Response' and contains a table with the following data:

| Filename                  | Filesize | Creation Date | Creation Time |
|---------------------------|----------|---------------|---------------|
| 113003_112997_EBA3BD15_2; | 589      | 05/13/2008    | 11:03:06      |
| 112976_112973_F2A3DBCA_2; | 560      | 05/13/2008    | 09:59:44      |
| 112974_112973_31E60A68_99 | 257      | 05/13/2008    | 09:59:34      |

Below the table, the text area displays the following content:

**HIPAA - Batch Response**

-----beginning-of-997-dump-----  
ISA\*00\*                   \*00\*                   \*ZZ\*445498161           \*ZZ\*100000041  
0\*U\*00401\*000000003\*0\*T\*:~GS\*FA\*445498161\*100000041\*20080513\*08500  
0~ST\*997\*14001~AK1\*HS\*315~AK2\*270\*000000001~AK5\*A~AK9\*A\*1\*1\*1~SE\*6  
~IEA\*1\*000000003~  
-----end-of-997-dump-----

On the right side of the window, there are three buttons: Find, Print, and Close.

# View Batch Response Rejected

EDS Provider Electronic Solutions (HIPAA) - [View Batch Response]

File Forms Lists Reports Tools Window Help

| Filename                  | Filesize | Creation Date | Creation Time |
|---------------------------|----------|---------------|---------------|
| 112501_112500_3739D0D6_9E | 259      | 05/13/2008    | 08:47:41      |
| 112499_112498_980831E6_99 | 265      | 05/13/2008    | 08:47:41      |
| 112496_112495_4DD08DDC_9  | 317      | 05/13/2008    | 08:47:41      |

### HIPAA - Batch Response

```
-----beginning-of-997-dump-----  
ISA*00*          *00*          *ZZ*061274678      *ZZ*100000041      *080501*160  
0*U*00401*000000003*O*P*:~GS*FA*061274678*100000041*20080501*16000643*5*X*004010  
~ST*997*5001~AK1*HC*447660212~AK2*837*000000001~AK3*PRV*8**8~AK4*2**7*324500000X  
~AK3*PRV*8**8~AK4*3**1~AK5*R*5~AK9*R*1*1*0~SE*10*5001~GE*1*5~IEA*1*000000003~  
-----end-of-997-dump-----
```

# Database Management

- *Providers should refer to pages of their Claims Billing Instructions for information regarding creating lists in the database.*
  - **Add**
  - **Edit**
  - **Delete**
- *Backup imperative – ctnewecs.mdb*
- *Archive when 1 MB*
- *Repair*
- *Compress*
- *Unlock*

# Archiving Files

*How do I Archive Claims for Future Reference?*

- *Retention tab settings (under tools → options)*

- *Determines Criteria for Archiving Claims*

*To archive claims select:*

- ***Tools***
- ***Archive***
- ***Create***

***Note:***

- *You will receive a prompt that all users must be logged out of the software*
  - *You will receive a prompt that all incomplete forms not modified in 30 days will be deleted*
- 
- ***Select the form (s) to be archived***
  - ***Select OK***

# Archiving Files

The screenshot shows a software dialog box titled "Options" with a blue header bar. The "Retention" tab is selected, displaying several configuration options with spinners:

| Option                   | Value |
|--------------------------|-------|
| Archive Days             | 60    |
| Max Batch                | 10    |
| Max Verify               | 25    |
| Max Log                  | 10    |
| Max Submit Reports       | 30    |
| Max Bulletin             | 10    |
| Password Expiration Days | 90    |

On the right side of the dialog, there are four buttons: Help, Print, OK, and Close.

# Retrieving Archived Claims

*To retrieve archived claims select:*

- Tools*
- Archive*
- Restore*
- Select archived file*
- Open*
- Select form type to be restored*
  - Click restore all forms*
  - Click restore only selected forms*

# Web Resources

- **Connecticut Medical Assistance Program Web site** [www.ctdssmap.com](http://www.ctdssmap.com)

**From the Home Page → Trading Partner → EDI to access:**

## **EDI software**

- Software full install and upgrades
- PES Handbook
- How to read 997

## **EDI Documents**

- Trading Partner Agreement
- Companion Guide

# Web Resources Con't

- **Connecticut Medical Assistance Program Web site** [www.ctdssmap.com](http://www.ctdssmap.com)
- **From the Home Page → Information → Publications**
  - *Publication Search*
  - *Provider manuals*
  - *Forms*
  - *Provider Newsletters*
  - *Claims Processing Information*

# Web Resources Con't

- *Connecticut Medical Assistance Program Web site* [www.ctdssmap.com](http://www.ctdssmap.com)

*From the Home Page → Provider → Provider Services to access:*

## *Schedules*

- *Claim Submission Schedule*
- *Claim Cycle Payment Schedule*

## *EDS Contacts*

- *Provider Relations*
- *EDI Helpdesk*

# Provider Electronic Solution Software

## Session Wrap Up

- Update information as needed
- Use software shortcuts
- Make the Software work for you
- Verify file accepted not just submitted successfully
- Perform backup and archive frequently
- Where to go for more information
  - [www.ctdssmap.com](http://www.ctdssmap.com)
- EDS EDI Assistance Monday through Friday, 8 a.m. to 5 p.m. (EST), excluding holidays
  - (860) 269-2026 (local to Farmington, CT)
  - 1-800-688-0503 (in-state toll free)
- Resource Handout from this session

# Questions & Answers

**Thank You For Coming**

**Please Complete Your  
Survey Before Leaving**

# Software Demo

