

OFFICE ALLY REPORTS

FILE SUMMARY & EDI STATUS



Once Office Ally has processed your claims, you will receive an email notification that your File Summary is ready. The File Summary will review the claims that Office Ally received for processing and whether they passed/failed Office Ally claim edits. After a payer has processed your claims, some will send back a confirmation or error message depending on whether the claim passed or failed their processing. Any payer response file we receive from the payers will be passed on to you in the form of an EDI Status Report. Please note that NOT all payers return responses to us, only the ones that are able.

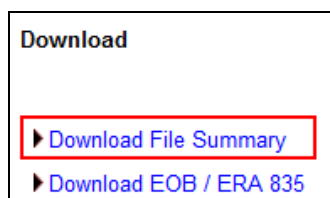
OFFICE ALLY REPORTS:

<p>File Summary Report (Default Report)</p>	<ul style="list-style-type: none"> • Text format (TXT) • Office Ally acceptances and rejections • Standard OA report (activated automatically) • Format specs can be provided if user will be creating a report parser (3rd party SW users)
<p>EDI Status Report (Default Report)</p>	<ul style="list-style-type: none"> • Text format (TXT) • Payer acceptances and rejections <ul style="list-style-type: none"> ◦ Note: not all payers provide response reports • Standard OA report (activated automatically) • Format specs can be provided if user will be creating a report parser (3rd party SW users)
<p>EDI Status Reports (Custom CSV format)</p>	<ul style="list-style-type: none"> • CSV (Excel) version of the EDI Status Report • User customizable • To activate CSV reports, follow these instructions
<p>Office Ally 999/277 Reports</p>	<ul style="list-style-type: none"> • ANSI format • Only available for SFTP submitters <ul style="list-style-type: none"> ◦ By request only – send an email to support@officeally.com • 999 – Initial batch acceptance notification • 277 (FS) – OA acceptances and rejections (ANSI 277 version of the File Summary Report) • 277 (EDI) – Payer acceptances and rejections (ANSI 277 version of the EDI Status Report)

FILE SUMMARY REPORT

Follow the steps listed below to view your File Summary (and EDI Status Reports) within the Office Ally portal.

1. When logged into the Office Ally website, click on the **Download File Summary** link on the left hand side.



- A calendar will appear on your screen (similar to Claim Fix). The **YELLOW** Active Date will reflect the date currently being reviewed (defaults to today's date until changed). Dates in **BLUE** indicate reports you have already viewed. **PINK** dates indicate there are reports that you have not viewed yet.

S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

Calendar Legend

- Active Date
- Report(s) To Be Viewed
- Report(s) Viewed

Notes: This Download File Summary page has been changed to display only File Summary and Payer Response reports. To view EOB and ERA 835 reports, please use page "Download EOB / ERA 835".

Payer	Form Type	File ID	File Name	#Accepted	#Pending	#Failed	Total	Download/View
MULTI	UB92	416110950	UB ONLINE ENTRY	0	0	1	1	VIEW
MULTI	HCFA	415990571	415990571_OATEST_20170418	1	0	0	1	VIEW

- When you click on **BLUE** or **PINK** dates on the calendar, reports available for that day will be listed.
- In the **File Name** column, you'll see that File Summary reports are sent back with your original file name included (if you upload files from a 3rd party software). If you submit using Online Claim Entry or Claim Fix, the File Name will reflect "[HCFA/UB92/ADA] ONLINE ENTRY".
- Click on **View** to open the report.

The **File Summary** will appear and look similar to the example listed below.

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Dear Submitter

Your claims file has now been processed by Office Ally, claims that are accepted below have been forwarded to the appropriate payer(s)
for final processing. Processing results for your claim file are as follows.

=====
The file 415990571_OATEST_20170418 was split into 1 file(s)
for processing. These file(s) are:

File ID      Payer (PayerID)      Claims      Totals
-----
415990579    Accountable Healthcare (AHIPA)      1           $255.00
                                           Total: $255.00
=====

Claims Upload File Summary

File Name:415990571_OATEST_20170418
Date Uploaded: 4/18/2017
Type of File: HCFA_TEST
Date Processed: 4/18/2017
1 # of Claims Initially Accepted
0 # of Claims Rejected
=====

-----ACCEPTED CLAIM DETAIL
-----
CLAIM# OA CLAIMID PATIENT ID      LAST, FIRST      DOB      FROM DOS      TO DOS      CPT      DIAG      TAX ID      ACCNT#      PHYS.ID      PAYER
-----
1)      1425127608 XXXXXXXXXXXX      Smith John      01/01/2000      06/06/2016 06/06/2016 99080      M542      330897513      1415815837      1234567890      AHIPA
=====

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The **File Summary** report will list all claims included within your file and whether they are:

Accepted	Claim passed Office Ally edits and will be sent on to the payer
Pending	Claim failed patient eligibility checking on the first attempt. If the payer has the retry process activated, we will put the claim into pending mode and will reprocess it every 7 days up to 3 attempts (21 days), in case it's just a matter of patient eligibility file not being up to date. If the patient is not found by the third retry the claim will be rejected back to you.
Rejected	Claim rejected for a specific reason (noted on the report). You will need to correct and resubmit the claim.

Once the file summary has been downloaded and viewed, the date on the calendar will change from pink to blue, indicating it has been viewed.

Make sure to check reports daily as it's your responsibility to correct and resubmit any rejected claims that you may receive. You can correct the claims within your practice management system or through our online Claim Fix tool.

EDI STATUS REPORT

Once the payer has processed your claims, those able to send back reports (not ALL payers can) will send back a confirmation or error message depending on whether the claims passed or failed. Any message we receive from the payer will be passed onto you in the form of an **EDI Status Report**. The report is similar to the File Summary Report. The **EDI Status Report** will be retrieved in the same section as the File Summary Report (**Download File Summary**).

You will see "Payer Response" under the **Form Type** column for all EDI Status Reports.

Payer	Form Type	File ID	File Name	#Accepted	#Pending	#Failed	Total	Download/View
MULTI	Payer Response	414628249	414628249 EDI_STATUS_20170412_test.txt	0	0	2	2	VIEW
MULTI	HCFA	414495691	414495691_OATEST_20170412	1	0	0	1	VIEW

The **EDI Status Report** will appear and look similar to the example listed below.

Dear: Submitter

 Electronic Claim Submission Payer Responses Provided By Office Ally

The following list of claims are the most current responses from their corresponding payers, please review the results of each claim and determine if further action is required for the claim. Should any claim be rejected please fix the error and resubmit the claim to Office Ally.

PayerID	Payer	# Accepted	\$ Accepted	# Pending	\$ Pending	# Rejected	\$ Rejected
(60054)	Aetna Healthcare	1	\$10,500.00	0	\$0.00	1	\$18,729.40

File ID	Claim ID	Pat. Acct #	Patient	Amount	PracticeID	Tax ID	Payer	Payer Process Dt	Payer Ref ID	Status	Payer Response
413564854	55641391	8842546	SMITH, JOHN	\$18,729.4	1234567890	330897513	60054	04/12/2017		REJECTED	NDC code missing/invalid
413564854	55641392	8842543	SMITH, JANE	\$10,500	1234567890	330897513	60054	04/12/2017		ACCEPTED	Claim has been accepted for processing by the payer

The EDI Status Report will reflect claim status responses that Office Ally received from the payer for this account on whichever day it appears on. Most come back within 3-5 business days, but every payer is different.

Please note the **Payer Ref ID** is the Payer Reference Number (not all responses will contain this). This is assigned by each insurance carrier per claim, and can be used with an Accepted Payer Response as proof that the payer received the claim. When contacting Office Ally regarding a Claim Not on File issue, this number may be requested.

REPORT FILE NAMING CONVENTION & SPECIFICATIONS

Office Ally Report File Naming Convention

File Summary - Professional	FS_HCFA_FILEID_IN_C.txt
File Summary - Institutional	FILEID_UBSUMMARY_YYYYMMDD.txt
EDI Status	FILEID_EDISTATUS_YYYYMMDD.txt
ANSI 999*	FILEID_SubmittedFileName_999.999
ANSI 277 - Professional (File Summary)*	USERNAME_FILEID_HCFA_277ca_YYYYMMDD.txt
ANSI 277 - Institutional (File Summary)*	USERNAME_FILEID_UB_277ca_YYYYMMDD.txt
ANSI 277 - Professional (EDI Status)*	FILEID_EDISTATUS_HCFA_YYYYMMDD.277
ANSI 277 - Institutional (EDI Status)*	FILEID_EDISTATUS_UB_YYYYMMDD.277
ANSI 835 & ERA (TXT)	FILEID_ERA_STATUS_5010_YYYYMMDD.zip (contains 835 and TXT) FILEID_ERA_835_5010_YYYYMMDD.835 FILEID_ERA_STATUS_5010_YYYYMMDD.txt

**999/277 report activation must be requested and are only available for SFTP submitters*

For File Summary and EDI Status Report layout specifications, [click here](#).