

# QUICK GUIDE TO OFFICE ALLY



## BASIC UPLOAD INSTRUCTIONS

1. Log into [www.officeally.com](http://www.officeally.com)
2. **Hover over** "Upload Claims"
3. **Click** "Upload HCFA"
4. **Click** "Select File"
5. Browse for your file and **click** "Open"
6. **Click** "Upload"
7. You will receive an upload confirmation page with your File ID number

## CHECKING YOUR FILE SUMMARY – THIS STEP IS CRITICAL!

Within 24 hours, your file summary is ready. This report lists the status of all claims received by Office Ally. This acts as your receipt that your claims have been entered into our system. If you submit via SFTP, we can also activate Office Ally 999/277 reports (from Office Ally - NOT the payer). Review your File Summary reports to ensure that all the claims you are sending are processing correctly as well as keep track of rejected claims you need to resubmit for processing.

1. Log into Office Ally
2. **Click** "Download File Summary"
3. **Click** the pink-colored day on the calendar
4. Below the calendar, **click** "View" and then **click** "Open"

## OTHER FEATURES AVAILABLE

- **Claim Fix** – Fix your rejected claims here! Your rejected claims are listed by date; click on a rejected claim, make any necessary updates, and click "Update". We will automatically reprocess your updated claims.
- **Inventory Reporting** – Search for claims using a variety of options including date-uploaded, patient name, insurance company, or tax ID.
- **View Claim History** – See claim status and EDI responses for a whole File ID or a specific claim
- **Patient Look-Up** – Check patient eligibility for IPAs.
- **Code Search** – Check the validity of ICD-9 and ICD-10 codes, place of service codes, and modifiers.

## WHAT INSURANCE COMPANIES CAN I SEND TO?

By signing up with Office Ally, you are automatically enrolled to send claims to 95% of our payers. However, a small number of payers require you to pre-enroll before we can send your claims electronically. You can confirm which payers require pre-enrollment by looking at the ENR (Pre-Enrollment Required) column on our payer list. Listings with "Y" mean that they will require pre-enrollment. EDI enrollment forms are available in the Resource Center under "Payer Enrollment Forms".

## CONNECT VIA SFTP

If you have the capability to transmit files via SFTP and prefer to submit that way, please contact Customer Service at 360-975-7000 Option 1 and request that one be set up. They will ask for the following information, so you will want to have this ready: Office Ally Username, Contact Name, Email, Software Name, Format Type being submitted, Will you want 999/277's activated (OA responses, NOT the payers).