

ONLINE CLAIM ENTRY

Institutional (UB) Claims

PAYER LIST LOOK UP

Office Ally has the ability to submit to thousands of insurance companies (payers). To review the list of payers we have a connection with, please visit our Payer List under Resource Center > Payer Lists, or by clicking <u>here</u>.

Payer List - Profession	nal (CMS1500) & Institu	tional (UB04) 면 Download the fi	ull list
Search by Payer ID	Search by Payer Name	SEARCH SHOW ALL	
Line of Business	Type/Model	Transactions	
ENR = Pre Enrollment Required	ST = State	RTE = Real Time Eligibility (270/271)	
TYP = Type/Model	LOB = Line Of Business	RTS = Real Time Claim Status (276/277)	
C/P - Commercial/Par	M = Medical / Professional	ERA = Electronic Remittance Advice (835)	
G/NP - Government/Non-Par	H = Hospital / Institutional	SEC = Secondary (COB)	

PRE-ENROLLMENT REQUIREMENTS

Certain payers require pre-enrollment to be completed before submitting claims electronically through a clearinghouse. If the necessary steps are not taken, your claims may be rejected back until pre-enrollment has been completed. You can find the necessary payer enrollment forms under Resource Center > Payer EDI Enrollment Forms, or by clicking <u>here</u>.



Payer EDI enrollment forms will be separated based on the state they're for. If a payer is not state specific, it will be listed under the "ALL or Multiple States Payer Enrollment Forms" section.

Payers with the ability to return Electronic Remittance Advice (ERA/835) may also require enrollment be completed before ERA's will be returned. The ERA enrollment forms can be found under Resource Center > Payer ERA Enrollment Forms, or by clicking <u>here</u>. ERA enrollment forms will be listed alphabetically.

•FFICE	HOME PRODUCTS SERVICES	RESOURCE CENTER S	UPPORT LOGIN
indicated on our Payer Lis required. Below is a list of	Electronic Remittance / ERA / 833 enotiment in order to activate Electronic Remittance Advice (E Is As a service to our customers, Office Alg provides these for all electronic remittance advice (ERASS) forms available (co anticipation of the Instructors Cover Page to ensure a	Payer EX Enrolment Forms Payer ERA Enrolment Forms Webinars	NS pre-enrollment for ERA are ce Afys information where ever accirrectimissing information.
	Payer ERA Enrollment F Click here to view Non-ERA Payer Enrollm		

If a payer is not able to receive electronic claims or we don't yet have them available on our payer list, Office Ally can send paper claims on your behalf. In order to activate this feature, the <u>Update Printing Option</u> form will need to be completed. This form is located under Resource Center > Office Ally Forms & Manuals > Account Management.

If you'd like to see a new payer connection made available on our payer list, you can send in a <u>New Payer Connection</u> <u>Request Form</u> and we will attempt to set the connection up (adding the requested connection is <u>not</u> guaranteed).

1. Go to www.officeally.com.



2. Hover your mouse over the Login button and select Service Center.

	Service Center	
	Practice Mate	
C	EHR 24/7	
gh	Forgot Password	ed
	Forgot Username	

3. Enter your Username and Password (password is case sensitive) and click Log In.

Usemame	1	
Password		

ONLINE CLAIM ENTRY (DIRECT DATA ENTRY)

Once logged into the Office Ally website, hover your mouse over **Online Claim Entry**. There will be multiple claim form options to choose from. The **Create Institutional (UB) Claim** option will allow you to begin completing the online claim form immediately. The **Institutional (UB) Managed Stored Info** option will allow you to build and store data for future claim use so that you will not have to manually enter that specific data for each claim you create.

Online Claim Entry	Create Professional (CMS-1500) Claim	
Claim Fix	Professional (CMS-1500) Manage Stored Info	
	Create Institutional (UB) Claim	
	Institutional (UB) Manage Stored Info	
	Create Dental (ADA) Claim	
	Claims Awaiting Batch	

After selecting **Create Institutional (UB) Claim**, a blank Institutional (UB) claim form will appear. Enter the payer (insurance company), patient, provider information, etc. into the appropriate fields before clicking on **Update** to submit the claim electronically. Once the claim is submitted, the payer, patient, and provider information will automatically store within **Managed Stored Info**.

_	l Claim F	orm											
Ь	oad Stored	l Info							Payer Nam	e:			
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1. To Add, Edit, or Delete stored information, click on **Institutional (UB) Managed Stored Info**. The below screen will appear.

Stored Patients	Start typing a patients name	Edit	Delete	Add
Stored Payers (optional)	Select Payer	✓ Edit	Delete	Add
Stored Billing Providers	Select Billing Provider	✓ Edit	Delete	Add
Stored Templates	Select Template	✓ Edit	Delete	Add
Stored Physicians more 💌	Select Attending Physician	- Edit	Delete	Add

2. Enter the Patient, Payer, Subscriber, and Other Insured (COB) data under the Stored Patients section.

Name (F, MI, L)		Zip
Address		
City		Gender
State		
Payer Informa	tion —	
Payer Name		State
Address		Zip
City		
Subscriber Inf	ormation	
Subscriber Name		Patient Relation Select One +
(F, MI, L) Address		Group Name
City		Group Number
State		Employment
		Status
Zip Marital Statua		Employer Name
Marital Status		Employer Address
SSN / Identificatio		State, Zip
Other Insured	(COB) Information ————	
Payer Name		Patient Relation Select One +
COB Name		Employment Status
(F, MI, L) SSN /		Employer Name
Identification		Employer Address
		Employer City State,
Group Name		Zip
Group Name Group Number		
Group Number	(COB) Information	
Group Number	(COB) Information	Patient Relation Select One
Group Number Other Insured Payer Name COB Name	(COB) Information	Patient Relation Select One
Group Number Other Insured Payer Name (F, MI, L)	(COB) Information	
Group Number Other Insured Payer Name COB Name	(COB) Information	Employment Status
Group Number Other Insured Payer Name (F, MI, L) SSN /	(COB) Information	Employment Status Employer Name

3. Enter the Payer Name, Address (or Payer ID), and City/State/Zip under the **Stored Payers** section.

Payer Form	nation ————	
Payer Name Address City		State Zip
		Update Cancel

4. Enter the Billing Provider Name, Address, Tax ID, NPI, etc. under the Stored Billing Provider section.

 Billing Provider F Billing Provid Group Name Provider Name (F, MI, L) Address City State 	orm	Zip State License ID Tax ID Phone NPI	
			Update Cancel

5. Enter the Provider/Physician Name, NPI, etc. under the **Stored Physician** section.

Physician Form	
Physician Information	
Physician Name (F, MI, L)	
State License ID	
NPI	
	Update Cancel

Note: Once stored, you can determine if it'll go out as the Attending Provider (default), Other Attending Provider, Operating Physcian, or Referring Provider.

Stored Physicians more

Stored Templates is an optional tool that can help you maximize efficiency when billing. It can be used for storing recurring Type of Bills, Revenue, HCPCS/HIPPS, Diagnosis codes, etc. for a specific patient or for storing commonly used codes for certain types of visits that apply to various patients. Enter a name for the template and any information you would like to appear on the claim form whenever this template is selected. Only the fields with a red outline can be stored.

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Below is and example of how Managed Stored Info is used to create a claim with the stored data you have entered.

From each drop down list, you will select the data that you would like to be automatically filled in on the claim form.
 Once the information is selected, click on the Create New Claim button.

Stored Patients	Smith, Jane (9/16/16)	Edit	Delete	Add
Stored Payers (optional)	Aetna 🗸	Edit	Delete	Add
Stored Billing Providers	John Smith, Inc. 👻	Edit	Delete	Add
Stored Templates	Type of Bill 131 🗸 🗸	Edit	Delete	Add
Stored Physicians more 💌	Smith, John 🗸	Edit	Delete	Add

After you have created the claim form from **Managed Stored Info**, there will still be required fields needing to be completed that cannot be populated from the stored information (i.e. Service Date).

After you enter all necessary claim data, review the claim for errors and then click the **Update** button at the bottom of the claim form. The program will alert you if you missed certain required fields. If all required fields were completed, clicking on **Update** will put your claim in the **Claims Awaiting Batch** section.

Form Validation Errors	×
6. Valid Statement From Date is required. 6. Valid Statement To Date is required. 67. Primary Diagnosis code required.	
	Close

CLAIMS AWAITING BATCH

After you've updated your claim, the process of submitting the claim has been completed. Your recently submitted claim is sent to the **Claims Awaiting Batch** (OLE submitters). Your claim(s) will sit in there until Office Ally picks them up for processing (occurs every 3 hours). From this section of Office Ally you can edit, print, or delete the claim before the claim is sent to the insurance company.

In order to access this section, hover over **Online Claim Entry** and select **Claims Awaiting Batch**.

Online Entry - Waiting to be Batched											
Form Type	Processed	FileID	Clairn ID	Patient Name	Total Charges	From DOS	Payer	Secondary	Print	Correct	Delete
UB04	4/18/2017	ONLINE	6682156	Smith, Jane	10.00	4/12/2017		Ν	۵	<u>Correct</u>	Delete

Don't forget to review the <u>reports</u> Office Ally sends back to ensure your claims were accepted. If a claim <u>rejects</u>, it is your responsibility to correct and resubmit the claim for processing.

CONTACT INFORMATION & SUPPORT OPTIONS

Business Hours: Monday thru Friday 5:00am PST to 9:00pm PST Saturday and Sunday 6:00am PST to 5:00pm PST

Email: info@officeally.com or support@officeally.com

Customer Service:	(360) 975-7000	Option 1
Technical Support:	(360) 975-7000	Option 2
Enrollments:	(360) 975-7000	Option 3
Accounting:	(360) 975-7000	Option 4
Scheduling (FREE Training Appointments):	(360) 975-7000	Option 5
	(
General Fax Number:	(360) 896-2151	
Enrollments Fax Number:	(360) 314-2184	
Accounting (Auto Pay) Fax Number:	(360) 953-8427	

Live Chat Available (6am – 5pm PST): Click <u>HERE</u> or enter <u>https://support.officeally.com/</u> into your browser to access Live Chat, Claim Rejection Solutions, Troubleshooter, News and more!

Online Video Tutorials: Click <u>HERE</u> or enter <u>https://cms.officeally.com/Home/VideoLibrary.aspx</u> into your browser to access video tutorials covering Online Claim Entry, Inventory Reporting, Secondary Claims and more!

