QUICK START GUIDE
EDI Claims Link for Windows® version 3.4

System Requirements
- Operating system: Windows 2000/XP or later
- Computer/Processor: Pentium 2, 233 MHz or greater
- Memory: 64MB Ram
- Minimum Screen Resolution: 1024 x 768
- Initial application set up takes up less than 5MB hard drive space. Storage space will increase as you add data to the program
- Internet Explorer 6.0 or later

Windows Vista specifics:
- It is highly recommended that the EDI Claims Link software, or any updates that may be released, be installed and executed using a profile with full administrative rights.
- Windows Vista users may need to install the Microsoft .Net Framework 1.1 onto your computer before installing EDI Claims Link 3.4, available at: http://www.microsoft.com/downloads/details.aspx?familyid=262D25E3-F589-4842-8157-034D1E7CF3A3&displaylang=en (We are only providing this as a reference, and are not responsible for any changes you make to your own computer.)

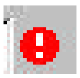
Installing The Software
- Download the software from the Provider website and save it to your desktop, or contact the EDI Helpdesk for a CD to be mailed to you.
- Double click downloaded file on your desktop to install the software.
- Follow the prompts in the installation program to complete the process.

Running the Software
The current version of EDI Claims Link does not create a shortcut on your desktop for the software. You will need to browse manually to the software, and create a shortcut manually if you wish to:
- Double click on “My Computer” on your desktop
- Double click on “Local Disk C:”
- Double click on the folder “Program Files”
- Double click on the folder “ValueOptions”
- Double click on the folder “EDI Claims Link 3”
- Locate the file called “EDI Claims Link 3”
  - You can double click the file “EDI Claims Link” to start the software
  - If you want to create a shortcut on your desktop, use your right mouse button to click and hold on the “EDI Claims Link 3” file, drag it to an empty portion of your desktop, release the right mouse button, then click the left mouse button on “Create Shortcut Here”

To Log in The First Time

The first time you access EDI Claims Link for Windows, the Submitter Maintenance Screen displays with a welcome message.

The Submitter ID and Password you create **must match** the ID and password you have for the ProviderConnect website.



The Warning Icon indicates missing information or incorrect entry. To view the error message, hover the cursor over the icon.

To Move among Fields

Forward: **TAB** key
Backward: **SHIFT** and **TAB** keys pressed at same time

Click on the down arrow to the right of the field to display a drop-down reference box with a list of valid entries. Highlight the correct entry to place its text in the field.

Clicking the down arrow beside the date field displays a **Calendar** to help you select the correct date, or you can type the date in the date fields using the format **MMDDCCYY**. All date fields require the century in addition to the year (e.g., 01/01/2007).

To Identify and Add a Submitter

From the **Main Screen**, click **Tools**, then **Submitter Data Maintenance**.

On the **Submitter List** screen, double-click **Add Submitter,** or double click an existing submitter name.

On the **Submitter Maintenance** screen, type the **Submitter ID** that matches the ProviderConnect website.

Type the submitter's password, and then type it again in the **Confirm Password** field.
Enter the submitter name.

Assign a contact person and enter his/her name and telephone #.

Click **OK**.

The name of the submitter now displays in the **Submitter List** window.

To Add a Provider to the Provider Database

From the **Main Screen**, click **Tools**, then **Provider Data Maintenance**, or click **Add Provider** under **EDI Claims Link Tasks** to go directly to the **Provider Maintenance** screen.

Create a billing record, to indicate the address your claims payment will be sent to:
Demographics
1. Record type: “Billing Provider”
2. Type the Provider’s last name or the Organization name
3. Enter the Provider’s first name and middle initial.
4. Enter the Provider’s **mailing address**, reflecting where your payments should be sent.
5. Type the name of the office contact person.
6. Type the Provider’s office phone number.
7. Enter the Provider’s fax phone number.

Identification Numbers
8. Select the type of Provider ID number used, Employer Identification Number (or Federal Tax ID number), or the Provider’s Security Social Number, from the drop-down menu in the Provider ID box. Type the appropriate ID number in the unlabeled box next to the right of Provider ID
9. Enter your National Provider ID (NPI) number into the NPI field.
10. Type the Taxonomy Code (if applicable)
11. Click **OK**. The name of the Provider displays in the Provider List window.

You must also create a Service Facility Location to associate to all claims created in EDI Claims Link. This is required even if the place of service is the same as the Billing Address.
Follow the instructions above, make this new provider record “Service Facility Location” and create the record to reflect the street address of the location where the service took place. You can create as many service facility locations as needed.

Please refer to the EDI Claims Link instruction manual for any further provider records that may be required, depending on the type of claims that you are submitting.

To Add a Patient to the Patient Database

1. On the Main Screen, click **Tools**, then click **Patient Data Maintenance,** or click **Add Patient** under the **EDI Claims Link Tasks** to go directly to the **Patient Maintenance** screen (Step 3).
2. If you clicked **Patient Maintenance** located under **Tools**, the **Patient List** screen displays. Double-click **Add Patient** located under the **Patient List**.
3. The **Patient Maintenance** screen displays.
4. Enter the patient’s demographics and Patient ID number.

Note: The Date of Birth field must be in MMDDCCYY format (e.g., 01/01/2000).

5. If the patient is also the subscriber (or primary insured), click the box next to “**Subscriber is Patient**.” This will pre-fill most of the lower section.
6. **Payer Responsibility:** Select the appropriate response.
7. Type the **Subscriber’s ID Number**. This will most likely be the same as the Patient ID in the upper right.
8. Enter **Group Number** if needed by the appropriate carrier requirements.
9. **Payer Name:** Select the appropriate value.
10. **Payer ID should be pre-entered. Do not change this value.**
11. Select the appropriate answer from the drop-down box for the **Release of Information.**
12. Select the appropriate answer from the drop-down box for the **Assignment of Benefits**, if necessary to change to **YES**.
13. Select the appropriate statement from the drop-down box for the **Patient Signature Source**,

if necessary to change to **On File**.
14. Select the appropriate statement from the drop-down box for the **Claim Filing Indicator.**
15. If there are Secondary and Tertiary subscribers, click on the appropriate tab at the top of the window and complete the required information on each tab.

The Batch Browse Window

The left side of the **Batch Browse** window is a ***Treeview*** showing the hierarchy of claims and batches. The two form types (Institutional and Professional) are the top level, batches for each form are on the next level, and providers are the third level. Individual claims are listed under each provider. Selecting an item by clicking on it in the ***Treeview*** opens it and displays all the items under it in the ***Listview*** on the right side of the window. Double-clicking a claim item in the ***Listview*** opens the **Claim Entry** window. Expanding an item (clicking on the '+' sign in front of it or double-clicking it) in the ***Treeview*** lists all items under it in the ***Treeview*** section.

To Create a Claims Batch

1. Click on **Add Batch** link on the **Task Pane** on the right side of the window. The Add Batch Window displays.
2. **Form Type:** Select whether you are creating an Institutional or Professional batch.
3. Type an identifying name for the batch. The Batch Name can be a combination of alpha and numeric characters and should be something that provides easy identification of the batch. A batch consists of any number of claims for any number of providers.
4. **Receiver name:** Select as appropriate for your claims.
5. Click OK.

The **Batch Name** is now displayed at the left of the **Batch Browse** window.

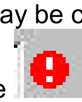
To Enter an 837p Claim

1. Click **File**, then **New Claim** on the menu bar at the top of the window or click the **Add Claim** link on the **Task Pane** at the right of the window. The **Add Claim Wizard** displays.
2. Ensure the correct form type and select an existing batch name or add a new batch name, and select the appropriate Receiver Name.
3. Click **Next.**
4. The **Add Claim Wizard** continues; select an existing provider from the drop-down box or add a new provider by clicking the **Add** button.
5. Select a Patient from the drop-down box or add a new patient by clicking the **Add** button.
6. Click **Next**. The **Claim Entry** window displays the Provider information, automatically copied from the Provider database. Verify all information on the Provider and Patient tabs. If any information is incorrect, exit from the claim, and update the information under Provider Data Maintenance or Patient Data Maintenance.
7. Click on the **Claim** tab**.** The claim form displays.
8. Select the **Service Facility Location** by selecting the address from the drop down menu.
9. The **Claim Submitter's Identifier,** an internal tracking number unique to each claim, is generated by the system based on the date and time the claim is created, and can be changed if needed.
10. Select a **Frequency Type** to define the type of claim.
11. Type in at minimum **1 Diagnosis code, up to 8 Diagnosis Codes.**
12. Click on the **Claim Details** Tab**.**
13. Fill in the first (or only) service line of the claim either by filling in the fields as indicated. Select a diagnosis code by selecting the number in the drop down menu that *corresponds* to the code on the Claim tab.
14. If there are additional claim bill lines, click on the next line and continue entering.
15. When all claim lines have been added to the form, click **Save**.
16. Click the **Close** button. The claim is saved and assigned a sequential number displayed in the **Batch Browse** window.
17. The **Add Claim Wizard** displays. To add another claim, click **Add Another Claim** and repeat the above steps; otherwise, click **Finish**.

Important: The above information contains the minimal information necessary for verification and acceptance of the claim into the Claims Processing systems. They neither imply nor guarantee payment of the claim. Information on required data elements for a particular contract can be found in the Claims Submission Manual.

To Enter an 837i Claim

1. Click **File**, then **New Claim** on the menu bar at the top of the window or click the **Add Claim** link on the **Task Pane** at the right of the window. The **Add Claim Wizard** displays.
2. Ensure the correct form type and select an existing batch name or add a new batch name.
3. Click **Next.**
4. The **Add Claim Wizard** continues; select an existing provider from the drop-down box or add a new provider by clicking the **Add** button.
5. Select a Patient from the drop-down box or add a new patient by clicking the **Add** button.
6. Click **Next**. The **Claim Entry** window displays the Provider information, automatically copied from the Provider database.
7. On the Provider tab verify all information for the Billing Provider is accurate. If any information is incorrect, exit from the claim, and update the information under Provider Data Maintenance.
8. Select the **Service Facility Location** by selecting the address from the drop down menu.
9. Click on the **Patient** tab. If any information is incorrect, exit from the claim, and update the information under Patient Data Maintenance.
10. Click on the **Claim** tab
11. In the **Statement Covers** area, type the **date range** covered by this claim.
12. Type the principal and other appropriate **diagnosis codes** for this claim in the **Diagnosis Codes** area.
13. Enter the billing details in the **Bill Detail** area, including **Type of Facility**, **Bill Classification** and **Frequency**.
14. Click **Claim Details**.
15. Complete the appropriate claim details. If there are additional claim bill lines, click on the next line and continue entering.
16. Click the **Close** button. The claim is saved and assigned a sequential number displayed in the **Batch Browse** window.
17. The **Add Claim Wizard** displays. To add another claim, click **Add Another Claim** and repeat the above steps; otherwise, click **Finish**.

Various fields for the Institutional claims on the Claim tab may be conditional based on the data entered in other fields. If required information is missing, the  icon will flash next to that field.

Important: The above information contains the minimal information necessary for verification and acceptance of the claim into the Claims Processing systems. They neither imply nor guarantee payment of the claim. Information on required data elements for a particular contract can be found in the Claims Submission Manual.

To Create and Send an EDI Claim File

When all claims have been entered into **EDI Claims Link for Windows®**, you can create a file to transmit by logging into *ProviderConnect* and following the instructions in the ***EDI Claims Link User Manual.***

1. Highlight the **Batch Name** on the left side of the **Batch Browse** window.
2. From the **File** menu, select **Create EDI Claim File** or click **Generate Claims File l**ocated at the top of the window. The **Create EDI Claim File** dialog box displays.
3. The path where the claims batch files are stored is defaulted by using the **File Name** ink; verify it is the correct path.
4. Leave the **Usage** as **Production.**
5. Click **Next**. The **Batch Claim File Wizard** will create a batch, and calculate the number of claims and total dollar amount in the batch.

We recommend writing down the filename, the number of claims and the total dollar amount, as you will need this information again shortly.

6. Log into ProviderConnect, and follow the instructions to submit your file.

To Review and Edit Previously Entered Claims

Highlight the Batch Name on the left side of the Batch Browse Window, or double click the batch name in the Batch window on the right hand side:

If you just need to review and read a claim, you can double click on the provider name and the patient name.

If you need to make any changes to any claims, click on the link that now says **"Reopen Batch". This link will change to "Generate Claim File". (Don't click again on Generate Claim File yet!)**

You can now go into the batch, make the appropriate changes to existing claims, add new claims, or delete existing claims. You can then generate a new claim file as described in the preceding section.

For Help and Information, Contact:

EDI Helpdesk
PO Box 1287
Latham, NY 12110
Phone: 888-247-9311
Fax: 866-698-6032
Hours: 8:00 AM to 6:00 PM (EST), Monday through Friday*
Email address: e-supportservices@valueoptions.com

*Not available during the following observed Holidays: New Years Day, Memorial Day, Independence Day, Labor Day, Thanksgiving Day, the day after Thanksgiving, and Christmas Day.