

edgeDMS

ITRANS Setup Notes

Version 1.1

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Edge Health Solutions, Inc
106 - 1688 152 Street
South Surrey BC
V4A 4N2 Canada
www.edgecanada.com

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Introduction

These notes describe the ITRANS setup for edgeDMS. Prior to setting up ITRANS, it is necessary to enroll with the clearinghouse, ITRANS, for claim processing. Identification assigned by the clearinghouse, by the Canadian Dental Association (CDA), and other provider identification needs to be processed prior to submitting a claim electronically.

Claims are created at the ledger and sent to ITRANS for further processing. Details about the claim are managed in the account window on the eClaim view. To view all of the claims in the system, use the eClaims Activity Manager window.

Once a claim is sent an acknowledgment transaction or explanation of benefits is returned. A claim can be reversed, but the reversal must be sent on the same day. Another option is to send a predetermination for a claim. There are reconciliation transactions, requests for outstanding transactions, and patient eligibility transactions.

Requirements and Enrollment

Computer and networking requirements

- edgeDMS installed on computers
- Internet access at the computer(s) where claims will be sent

ITRANS Registration

- Sign-up fee paid
- Registration forms submitted
- Approval letter received
- Submitter Identification Number: _____
- Password: _____
- Digital certificate installed at the server using KeyGen

Electronic Medical Claim (EMC) agreements

CDAnet

- Form submitted
- Approval letter received
- Clearing house notified
- Provider Identification Number: _____

Blue Cross/Blue Shield

- Form submitted
- Approval letter received
- Clearing house notified
- Provider Identification Number: _____

edgeDMS Setup Overview

- Insurance Carrier defaults set
- Test claims created, sent and reviewed
- Live claims created and sent
- EOB received and claim status updated

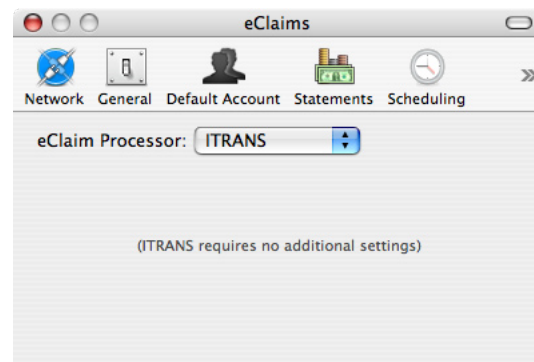
ITRANS Setup

Prior to creating and submitting claims electronically, it is necessary to receive an electronic certificate, set the eClaim preference to ITRANS, and enter default information used to identify the office and providers.

Setting up eClaim Preferences

To set up eClaim preferences in edgeDMS:

1. Select **File>Preferences>eClaims**.
2. Set the eClaim Processor to **ITRANS**.
3. Click **OK** to the warning message that comes up.



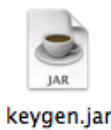
Setting up a Digital Certificate

After receiving an identification number and password from ITRANS, you are ready to set up the digital certificate.

Note: You must set up a digital certificate for each provider in the system. The only information that is different for each provider is the Provider ID.

To set up the digital certificate:

1. Run the keygen.jar application. Click:
Applications/EdgeHealthSolutions/eClaims/ITRANS/keygen.jar



keygen.jar

The following window displays.

Your E-mail Ad...	<input type="text"/>
Password :	<input type="password"/>
Provider ID :	<input type="text"/>
Site ID :	<input type="text"/>

2. Click **Agreement**.
3. Click **Canadian Dental Association**.
4. Enter your e-mail address, password, provider ID and site ID as provided by ITRANS.
5. Click **OK**.

The digital certificate will be received.

Verifying ITRANS is Running

To verify ITRANS is running:

1. Select **Transactions>eClaims>Show Activity Manager**

At the bottom of the Processing Status box, the message should read "ITRANS running".

Insurance Reference

Payer Number

The payer number (**Payer #**) must be entered for each insurance carrier you want to send claims to electronically.

There are two ways to identify the payer number for each insurance carrier:

- Use the document provided by CDAnet
- Use the minibrowser available in edgeDMS.

Using the Minibrowser

To start the minibrowser:

1. Select **Transaction>eClaim>Open MiniBrowser**.
2. Select **Payer List**.

From the minibrowser, you can select and copy the number, then paste it into the Payer # field.


You can access the payer # field directly from the account window, or use the insurance reference.

Using Account view

1. To open the required account, select **File>Open Account**
2. Select an account and click **Open**.

- Click  next to Insurance One or Insurance Two.


The Insurance Plan Reference window will open.

- Click  to allow editing.
- Type the number into the Payer # box.
- Click **Save**.

Note: This only needs to be done once for each insurance plan.

Using Insurance Reference


To open the Insurance reference dialogue:

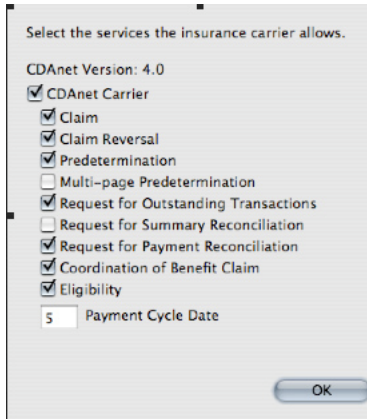
- Select **Reference>Insurance Plans**.
- Click  to allow editing.
- Select the appropriate Insurance Plan from the list.
- Type the payer number into the text box
- Click **Save**.

eClaims

There are many types of transactions that EdgeDMS can send. Not all insurance carriers accept all types of transactions. Using the checkboxes, indicate the transactions accepted for each carrier.

To open the insurance plan reference:

- Select **Reference>Insurance Plans**.
- Select the plan.
- Click  to allow editing.
- Click **eClaims**.



Select the services the insurance carrier allows.

CDAnet Version: 4.0

- CDAnet Carrier
- Claim
- Claim Reversal
- Predetermination
- Multi-page Predetermination
- Request for Outstanding Transactions
- Request for Summary Reconciliation
- Request for Payment Reconciliation
- Coordination of Benefit Claim
- Eligibility
- Payment Cycle Date

OK

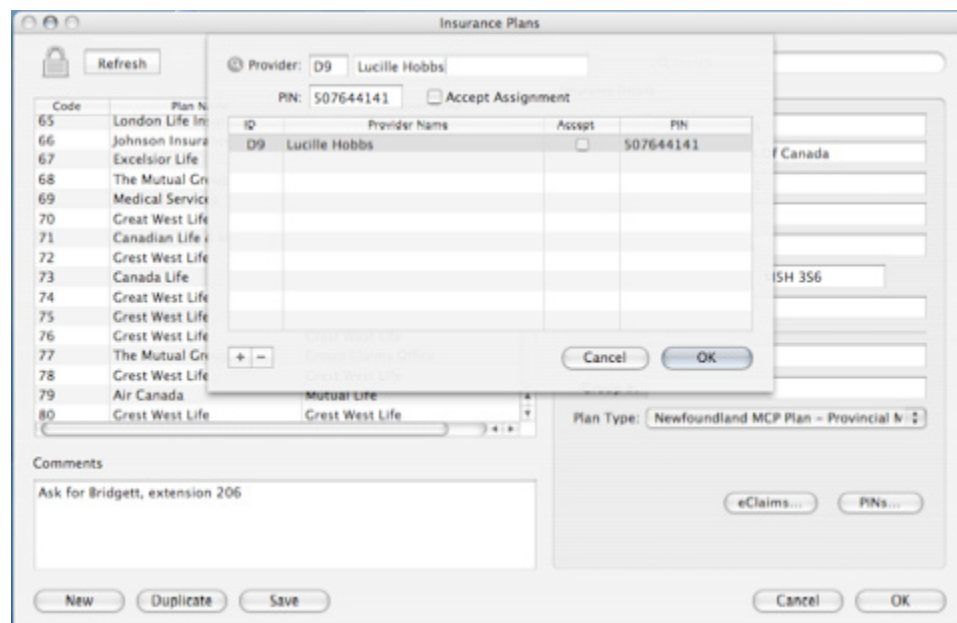
- Check all boxes that are appropriate for this carrier.
- OK**.

PINs

Some insurance carriers also assign a Provider Identification Number (PIN) to each provider.

To enter the PIN:

1. Click the **PINs** button on the insurance reference to display the PINs sheet.




2. Select a provider and enter the PIN.

Office Reference

Office

The office number needs to be entered for each office you want to send claims from.


To enter the office number:

1. Select Reference >Office
2. Click  to allow editing.
3. Enter the office number and click **Save**.

Provider Details

The provider details need to be amended for each provider that will be using eClaims.

To enter provider details:

1. Select **Reference>User**.
2. Click  to allow editing.
3. Ensure the **Provider** and the **CDAnet Subscriber** boxes are checked.
4. Click **ID numbers**.

A dialog will appear.

5. Enter the Provider ID you have been given in the Unique ID field.

Provider:	<input type="text"/>	Prov. License:	<input type="text"/>
UPIN:	<input type="text"/>	CLIA:	<input type="text"/>
Other 1:	<input type="text"/>	Unique ID:	<input type="text" value="123456789"/>
Other 2:	<input type="text"/>	S. Ins:	<input type="text"/>
Other 3:	<input type="text"/>	Federal ID:	<input type="text"/>
Other 4:	<input type="text"/>	National Provider ID:	<input type="text" value="0"/>
Other 5:	<input type="text"/>	Billing Name:	<input type="radio"/> Provider <input checked="" type="radio"/> Office
DEA:	<input type="text"/>		

Account Details

There should be no changes necessary to the account details as long as all the data has been correctly entered. Check the Guarantor and Co-guarantor's Insurance is set to the correct Carrier. Check the patient has the correct insurer set for primary and secondary coverage.

The dependant code must be set for each patient that will use eClaims in the Coverage section of the account.

To set the dependent code:

Open the account:

1. Select the **Patient** tab.
2. Click **Coverage**.
3. Enter the dependant code here that appears on the patient view.

Insurance Coverage	Plan ID Number	Division/Section	Dependant	Subscriber ID	Payee	Card Version	Primary	Secondary
Guar. Ins. One: Signature Vacations <input checked="" type="checkbox"/>	356356	5656	18	4634635653	Dentist		<input checked="" type="radio"/>	<input type="radio"/>
Ins. Two: <input type="checkbox"/>					Subscriber		<input type="radio"/>	<input type="radio"/>
Co-guar Ins. One: <input type="checkbox"/>					Subscriber		<input type="radio"/>	<input type="radio"/>
Ins. Two: <input type="checkbox"/>					Subscriber		<input type="radio"/>	<input type="radio"/>

Coverage Notes

