

## Electronic Claims Setup Using (837 ANSIX12 ONLY) For Gateway EDI

### Before you begin

Log on to Office Therapy with the Administrative ID and password or as a user that has Administrative rights.

### Gather Your Gateway Provider and Group Information

Please have your Provider and Group Information available. This can be found on the Gateway EDI website at [www.gatewayEDI.com](http://www.gatewayEDI.com) Please have the Gateway Addendum handy.

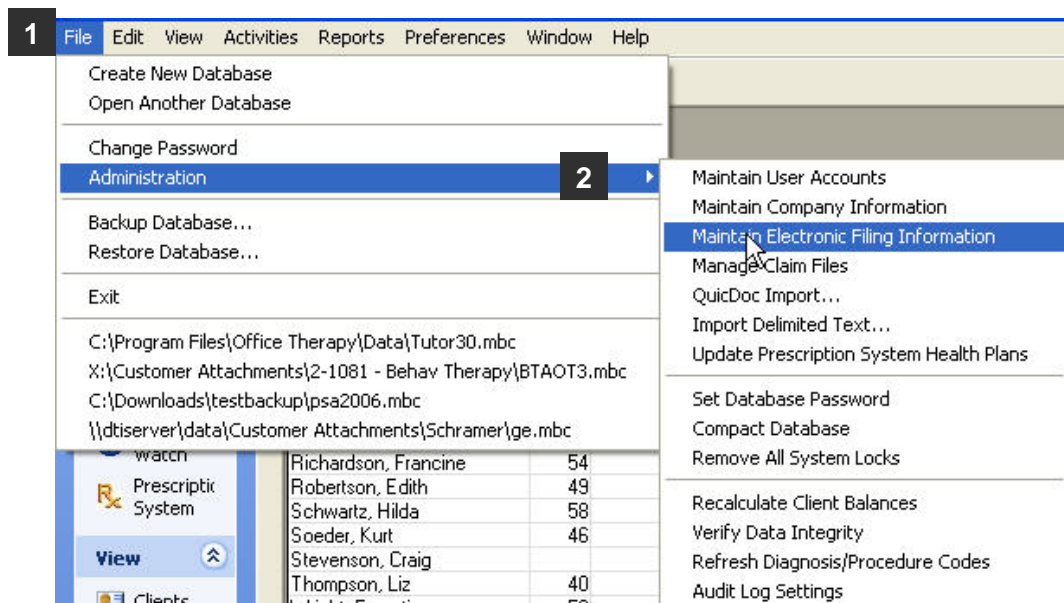
### Find your taxonomy code

A taxonomy code is 10 digit code required by Gateway EDI that identifies your specialty. If you do not know your taxonomy code you may look one up at [www.wpc-EDI.com/codes/taxonomy](http://www.wpc-EDI.com/codes/taxonomy).

## Getting Started

Once you have gathered the information, open Office Therapy and begin entering in the data. (DO NOT use any special characters in any of the fields; use only numbers and letters)

1. From the File menu, click Administration
2. Select Maintain Electronic Filing Information



This will open the Electronic Filing Setup window.

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Follow the numbered steps below to continue the setup in the Electronic Activation screen.

3. Make sure the **Use Gateway EDI Clearinghouse** box is checked. By checking this box it will automatically add the Receiver Company Info at the bottom of this screen.
4. Make sure the Active option is selected and the Type is set to 837.
5. **Test Mode:** If the NSF\837 Test Mode is checked the claims will **NOT** finalize. This is useful when you are in the testing stage with Gateway.


→ **Finalizing claims** - when claims are processed using 'produce new claims' in the billing wizard, on a billing cycle, a question will be asked "Was the printing/filing of the HCFA claims successful". If you click "yes" the claims will be finalized and there will be no way to re-produce the BATCH. If you click "No" then claims will NOT be finalized, issues can be addressed and then the batch CAN be re-produced. However, when Office Therapy is set up in TEST MODE, this message will not appear and no claims will be finalized.

**Exception** - If any provider or Ins. co is still set to file paper claims, this message will appear and selecting yes or no does not matter, these claims will NOT be finalized.

6. No **ISA or GS Header Information** needs to be entered or modified to file claims to Gateway EDI. For more information about ISA and GS headers log on to:  
<https://www.gatewayedi.com/gedi/docs/HipaaCompanionDoc.pdf>

The screenshot shows the 'Electronic Filing Setup' dialog box with the following fields and callouts:

- 3:** Points to the 'Use Gateway EDI Clearinghouse' checkbox, which is checked.
- 4:** Points to the 'Electronic Filing Status' section, where 'Active' is selected and 'Type' is set to '837'.
- 5:** Points to the 'NSF\837 Test Mode' checkbox, which is checked.
- 6:** Points to the 'ISA and GS Header Information' button.
- 7:** Points to the 'Export folder for NSF/837' text box, containing the path 'C:\Documents and Settings\All Users\Documents\Docutrac\Office Therapy\Data\...'.
- 8:** Points to the 'Browse' button (three dots) next to the 'Export folder for NSF/837' field.
- 3:** Points to the 'Receiver Company Info' section, where 'Name' is 'GATEWAYEDI' and 'ID#' is '431420764'.

7. The **Export folder for NSF/837** is the location where the batch or single claim file will be output. This is the path you will specify to Gateway so that they can retrieve the claim file. This default location is dependant on the Operating System you have installed on the computer.  
 Windows 7 is - C:\Users\Public\Documents\Docutrac\Office Therapy\Data  
 Vista Default is - C:\Users\Public\Documents\Docutrac\Office Therapy\Data  
 XP Default is - C:\Documents and Settings\All Users\Documents\Docutrac\Office Therapy\Data
8. If Office Therapy is in a network environment it may be necessary to use the Browse button  to navigate to a different location.

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9. In this section, Submitter ID is required. It is supplied to you by Gateway. It will be 4 characters and will also be the User ID Logon for the Gateway EDI website.

10. These fields contain the technical contact information of the person filing claims. For Contact # and Type use the telephone number.

### Providers Filing Electronically

11. Click the Providers Filing Electronically Tab

12. Select the providers you want included in the E- filing process.

You can elect to move ALL from **Excluded** to **Included** and visa versa by clicking a double arrow. >> <<

Or move a SINGLE choice by clicking to highlight then clicking a single arrow.

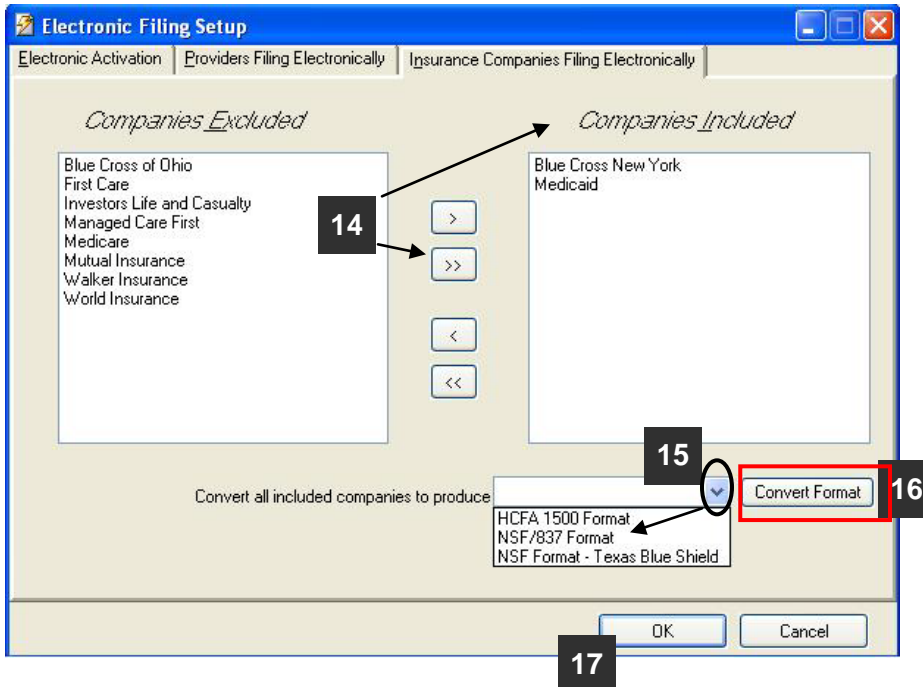
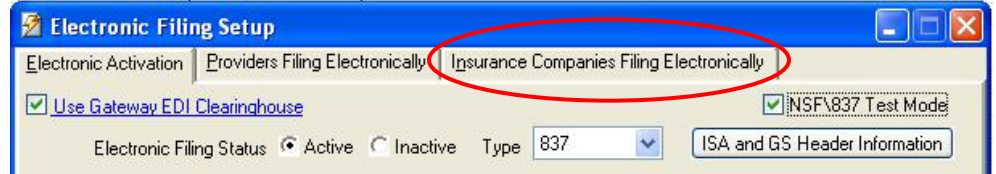


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### Insurance Companies Filing electronically

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13. Click the **Insurance Companies Filing Electronically** Tab



14. Choose the Insurance Companies you want to be included in the filing process.

You can elect to move ALL from **Excluded** to **Included** and visa versa by clicking a double arrow.

Or move a SINGLE choice by clicking to highlight then clicking a single arrow.

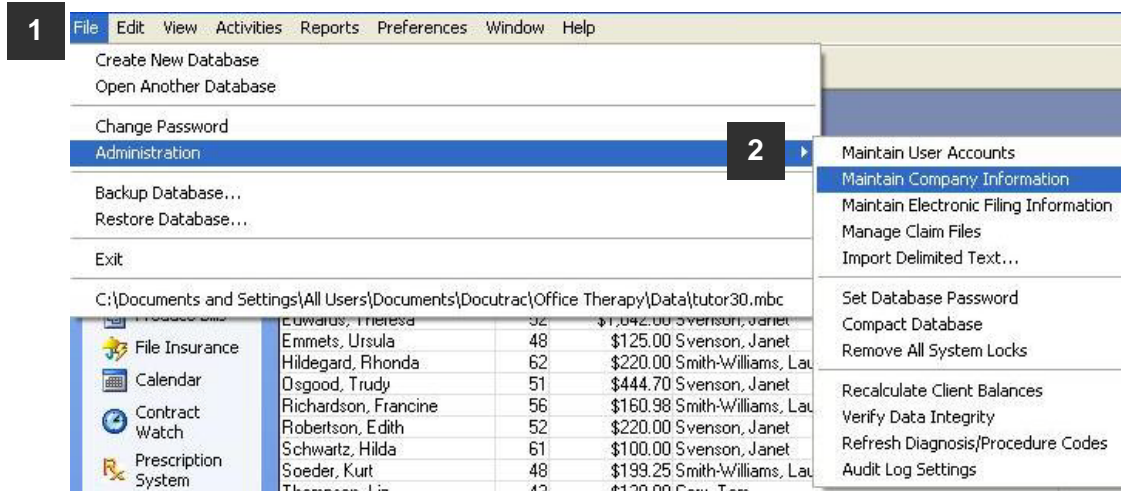
15. **Convert all included companies to produce:** From the drop down pick list, select **NSF/837 Format**.

16. **IMPORTANT:** Click on the **Convert Format** button to convert and save the file format. The claim files that are generated for the insurance companies listed under *Companies Included* will now be created using the 837 electronic format.

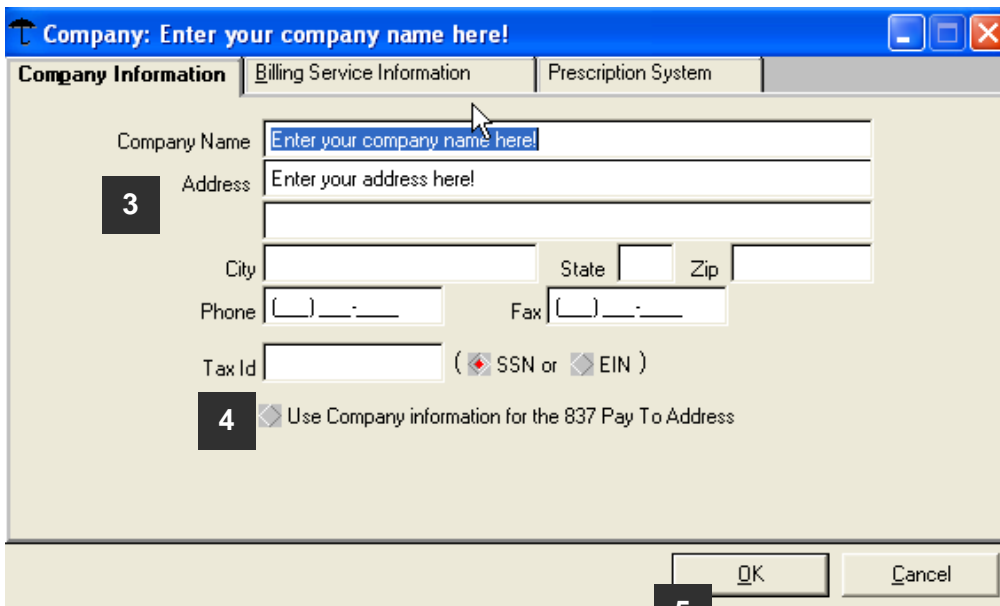
17. Click **OK** to save your settings.

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## Company Information



1. From the **File** menu, click **Administration**.
2. Select **Maintain Company Information**.



3. Fill out the information with your company name, address, phone and fax numbers, and tax ID.

4. Leave **Use Company information for the 837 Pay To Address** unchecked.

→ **DO NOT FILL OUT BILLING SERVICE TAB UNLESS YOU ARE SOLELY A BILLING SERVICE.**

5. Click **OK**.

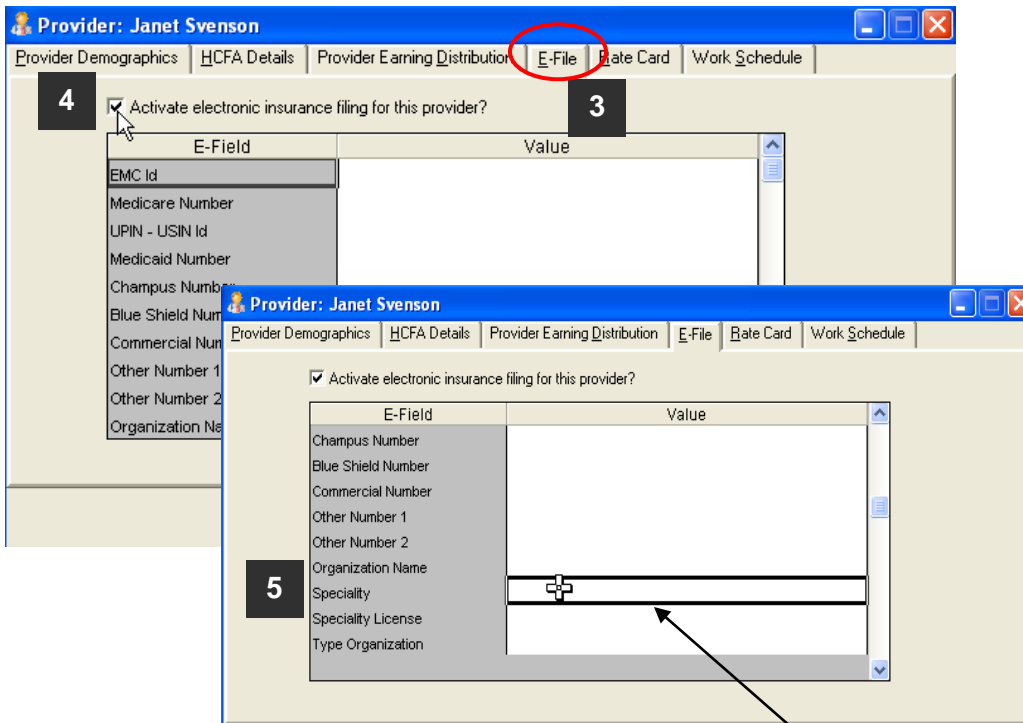
## Electronic Claims Setup Using (837 ANSIX12 ONLY) For Gateway EDI

### Provider Setup

1. From the **View** menu, click **Providers**.
2. Double click on a Provider's name in the list to open the Provider setup window, assuming that the information for the provider you are activating for electronic filing has been previously entered.



3. In the Provider setup window, click the **E-File** tab.
4. Check the box, **Activate Electronic insurance filing for this provider?**



5. Scroll down through the fields to find **Specialty**, and then enter the **Taxonomy Code**.

**Taxonomy Code:** A taxonomy code is 10 digit code required by Gateway EDI that identifies your specialty. If you do not have a taxonomy code you can get information at [www.wpc-EDI.com/codes/taxonomy](http://www.wpc-EDI.com/codes/taxonomy) This is a Web site with more information on how to obtain a taxonomy code.

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6. Click on the **HCFA Details** Tab.

7. Enter the following information:

25. Enter either a SSN or an EIN (Tax ID) number.

Select the option for **EIN**.

24J. This is for the New Individual National Provider Identifier assigned to the provider.

33a. This is for the New Organizational NPI assigned to the facility. This must be different from 24J. If you don't have an Organizational NPI, leave blank.

31. The Physician or Supplier. (Signature).

33. This is the billing information for the Provider.

8. 33. (PIN #). Click **Add** - This is a field for the secondary Id that may be assigned by an insurance company. Also known as the Rendering or Legacy number.  
**Note:** Most Insurance Companies are no longer using the Rendering/Legacy number. If you are unsure of whether to enter this number or not, contact Gateway or contact the specific Insurance Company to find out if they are identifying the provider by the NPI # and the tax ID.

9. Choose Insurance Company from the pick list. This assumes that you have entered your insurance companies into the system.

Enter an **Id**, and choose a **Type** from the pick list.

For Gateway EDI you must select **NO** from the pick list for *Rendering Provider is the same as the Pay to Billing Provider when filing the 837 Format*.

10. Click **OK**. Then click OK again on the Provider setup window.

## Electronic Claims Setup Using (837 ANSIX12 ONLY) For Gateway EDI

### Insurance Company Setup

From the **View** menu, click **Insurance Companies**. Then double click on an Insurance Company's name in the list to open the setup window.

HCFA Box #	Leave Blank	Copy Data From HCFA Box #	Use The Following Text
4			
7			
9			

1. In the setup window, click on the **HCFA Details** Tab.
2. Box 1: *If applicable*, choose the **Insurance Type** from the drop down pick list.
3. Box 33 Grp.# If a Group number is located under the GRP column on the Gateway Addendum enter it in the **Insurance Id** field.

Select an **ID Type** from the drop down pick list.

Gateway requires you choose from one of the following five: 1A-1B-1C-1D or G2.  
If filing claims with an Organizational NPI number, enter the tax ID and select EI for ID Type.

4. Click the E-File tab.

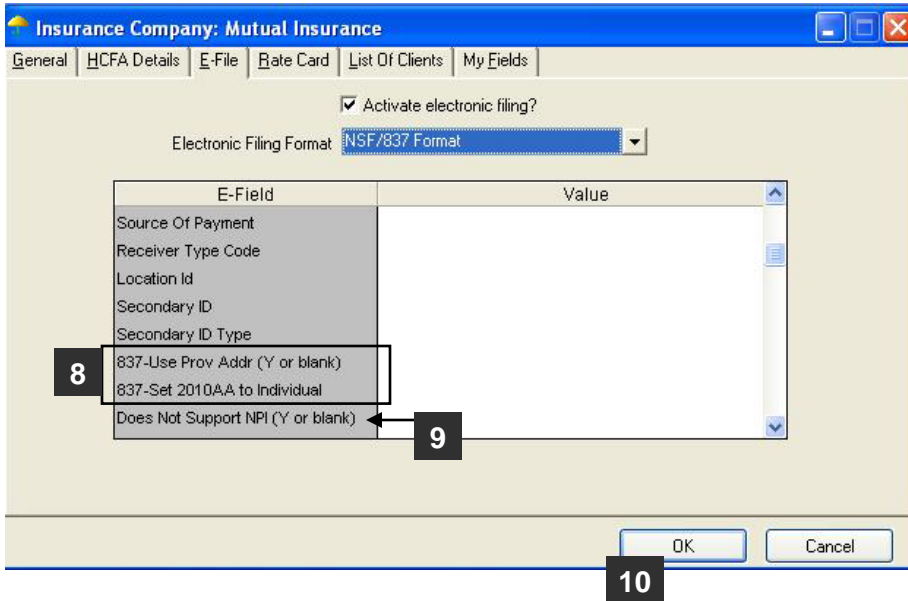
E-Field	Value
National Payor Id	Enter NPI Here
PPO Id	
Source Of Payment	
Receiver Type Code	
Location Id	
Secondary ID	
Secondary ID Type	
837-Use Prov Addr (Y or blank)	

5. Check the box for Activate Electronic insurance filing? for this Insurance Company. It may already be checked.
6. For Electronic Filing Format, select **NSF/837** from the pick list.

7. The **National Payer ID** is a 5 - 7 digit number. (Please Refer to the Gateway Addendum).



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**8. 837 – Use Prov Addr (Y or blank) and Set 2010AA to Individual:**

If you are part of a **Group** and you have a group number on the Insurance Company/ HCFA details tab/ Box 33 – Group #, put a **Y** in the value for **Use Prov Addr & 837**.

If you are an **Individual**, put a **Y** in the value for **837 – Set 2010AA to Individual**.

**NOTE:** Entering a Y in the correct area ensures that the Individual and Organizational NPI numbers show up in the correct loop and segment on the claim. If you have an Org NPI or Grp. Number, chances are you are set up as a group and must enter the letter Y in the **837-Use Prov Addr** field.

Anytime a provider is filing under the Organization NPI enter the letter Y in the 837-Use Prov Addr field.

**9. Does Not Support NPI (Y or blank) – Enter a Y here and neither the Individual nor Organizational NPI will populate in the electronic claim file.**

**10. Click OK to save.**

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## Client Setup

Under the **View** menu, click Clients. In the Clients window double click on a client's name in the list to open the **Client Setup** window.

1. Click on the **Insurance** tab. This screen will default to the Primary Insurance, assuming that you have already entered the insurance information for the client. Click **Secondary** in the **Policy Explorer** for a client's Secondary Insurance. All fields for primary that our required are also required for secondary.

Client Setup: Trudy Osgood

General Parties **Insurance** E-File Standard Charges Bill Setup Diagnosis Notes Docs My Fields

Policy Explorer

Active Policies

- Primary - Investors Life and Casual
- Secondary - Blue Cross of Ohio

Inactive Policies

New Policy Deactivate Delete

Active Primary Policy

Company: Investors Life and Casual

Subscriber: Trudy Osgood

Policy Id: P 221-9763-00A

Group Number: [ ]

Group Name: [ ]

Claim Filing Ind: [ ]

Addit. Policy Id: [ ]

Type: [ ]

Insr. Type: [ ]

Medicare Assignment Code: A = Assigned

Release of Info.: Y = Yes, Provider has a [ ]

(27) Accept Assignment

Signature: Janet Svenson

File claims

Policy Begin: 09/10/1995

Policy End: [ ]

Managed Care Contracts

Watch	Date Range	Visits	Constraints	Comm
<input checked="" type="checkbox"/>	07/06/1998 - 09/30/1998	Authorized: 8.0 Used: 3.0 Remaining: 5.0	Includes: 90847	Final contract.

OK Cancel

2. Make sure **File Claims** is checked.
3. Gateway EDI requires values in the **Claim Filing Ind.** and the **Insr. Type.**  
**Claim Filing Indicator** – Use one of these four options: BL, CI, MB or MC only.  
**Insur. Type** – Use one of these three options: C1, MB or MC only.
4. Click the **HCFA/837 Details...** button.

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The screenshot shows the 'HCFA/837 Details' window with the following fields and callouts:

- 5:** Referring Physician Information - ID field (National Provider ID, ID: 12345)
- 6:** Patient Status - Date of Current Illness (07/30/2008)
- 7:** Hospitalization Dates Related To Current Services - Copy HCFA Box #33 checkbox
- 8:** Facility Information - 32a. Facility NPI and 32b. Other ID and Type
- 9:** OK button

5. **Box 17.** Enter Referring Physician Information. If the NPI is required, enter it in the field labeled **ID** and choose National Prov ID from the pick list in the **ID Type** field.
6. **Box 14.** This field is required. Make sure the **Date of Current Illness** is ON or BEFORE the first date of service.
7. **Box 32.** Either fill in the **Facility Name and Address**, or make sure that the **Copy HCFA Box #33** is checked. If you are filing with an Organization NPI number you will have to type in the address where the service was rendered for each client.  
Correct Format Example:  
 Name of facility  
 Address 1  
 Address 2  
 City, ST 00000
8. **32a and 32b** are listed for facility NPI numbers; however, some Insurance Companies may require these fields to be populated. If you are filing with an Organization NPI enter it in box 32a.
9. *Complete any other information the Insurance Company may require.* Then click **OK** to save.

## Electronic Claims Setup Using (837 ANSI X12 ONLY) For Gateway EDI

### Provisions

DocuTrac Inc. has provided this guide to you based upon required information from Gateway EDI and the ANSI 837 X12 Implementation Guide. Please use this Office Therapy guide to assist you in setting up the program to generate electronic claim files.

Acceptance of claims through Gateway EDI and the Insurance Company is dependant upon valid data entered into the program. This guide only reflects required fields of the most standard version of an electronic claim form.

Following the steps in the guide will increase the likelihood of a successful first time test with Gateway EDI and expedite that process. Following the steps in this guide will not guarantee claims to be accepted or paid.

To learn about the ANSI 837 X12 Implementation:

<http://www.nahdo.org/project/837101Tutorial.htm>

<http://www.cms.hhs.gov/MLNMattersArticles/downloads/MM5334.pdf>

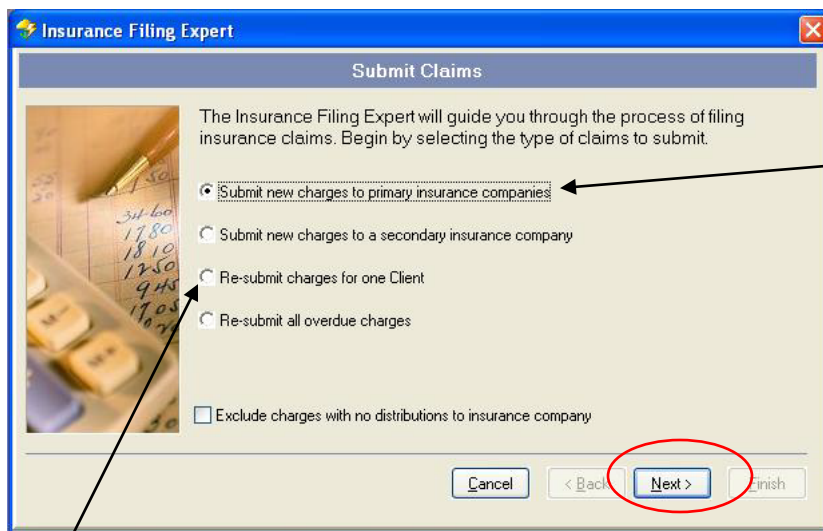
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### Creating a Test Batch - PLEASE READ ALL INSTRUCTIONS FIRST

It will be to your benefit to have a full understanding of the billing cycle, Test Mode and finalizing claims in Office Therapy BEFORE you create a test file. Please contact DocuTrac Technical Support to schedule a time for creating and managing your claim files.



Click the **File Insurance** icon in the left menu bar.



Use the first selection of 'Submit new charges to primary insurance companies' and click on Next. (This will generate a batch of claims for ALL Open Charges in the program)

To submit charges for one client at a time, please use **Re-submit charges for one Client** option. This option will NOT finalize a charge in the ledger's FILE column.

Follow the instructions on each page of the Insurance Filing Expert. Then click **Finish**.

## Electronic Claims Setup Using (837 ANSIX12 ONLY) For Gateway EDI

Once the 837 file is created an **Electronic Claims Log** will be displayed.

Be sure to make note of the location in the line **837 Claim File to...** This will tell you where on the computer the file you have created can be found in order to upload it to Gateway EDI. This is the same path that can be found on the **Maintain Electronic Filing Information** screen.

**837 Errors:** If there are errors in the creation of the 837 you will be prompted by a message window. You will need to correct these errors and regenerate the claim. The errors and error locations can be viewed on the Electronic Claims Log.

**Print Preview**

1/1

**Electronic Claims Log**  
837 Claim File to C:\Documents and Settings\All Users\Documents\DocuTrac\Office Therapy\Data\07101600.837 (Sub No: 000015)

<u>Id</u>	<u>Last Name</u>	<u>First Name</u>	<u>Insurance Company</u>	<u>From Date</u>	<u>To Date</u>	<u>Amount</u>
2	Potter	Harry	BCBS of Never Never Land	10/15/2007	10/15/2007	200.00
1	Simpson	Bart	AccidentsRUs	02/13/2007	03/29/2007	600.00
1	Simpson	Bart	AccidentsRUs	04/09/2007	08/06/2007	600.00
1	Simpson	Bart	AccidentsRUs	08/20/2007	09/10/2007	200.00

Total Sent To File: 4

Print Send To Print Setup Close

It is suggested to print this out – This is the only record with the client information and the file name.

Please see page 2, item number 5 of this guide for **Test Mode**.

**File Name:** All claim files end with **.837**. The file name is the 2 digit year, 2 digit month, and 2 digit day, followed by 2 digits for the series. Example (10122000.837 is December 20, 2010 and the first claim created that day. The next claim on the same day would be 1022001.837)

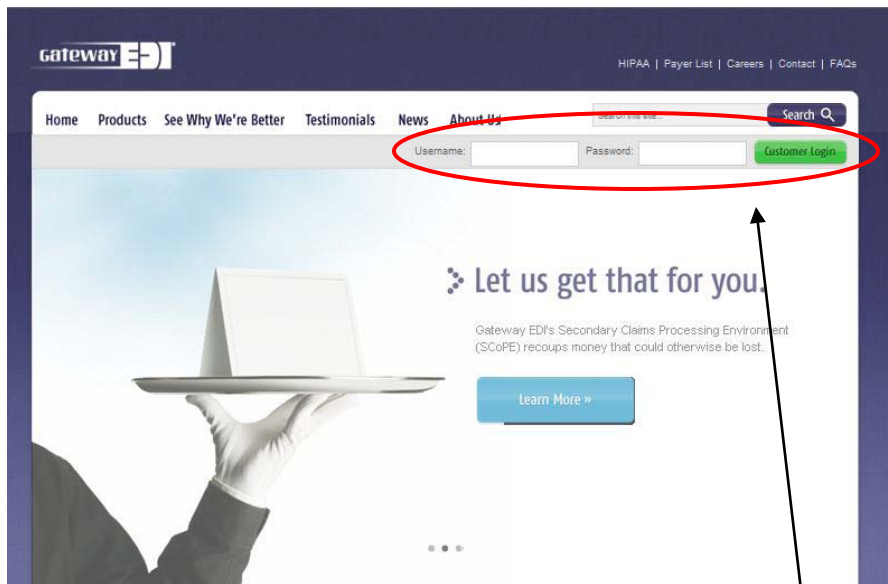
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### Contacting Gateway EDI

***Prior to your test date with Gateway, make sure you have completed the set up with the assistance of a DocuTrac Technical Support Representative.***

You are now ready to upload your test file to Gateway EDI. Please contact a Gateway Representative for instruction on how to transmit the file.

### Obtain Provider Information



Open your web browser and direct it to [www.gatewayedi.com](http://www.gatewayedi.com)

Enter your Gateway EDI user name and password. If you do not have one, please call Gateway EDI at **1-800-556-2231**.

Rest your mouse on **My account** to view a pop up menu. Select **Manage Providers**. Then select View **Provider Details and Enrollment Status**.

Click on a provider name, and a document will appear with provider, payer and grp. Numbers that you will need to enter in the Office Therapy Program.



You can print this out or view it in excel by selecting one of the icons on the top of the page.