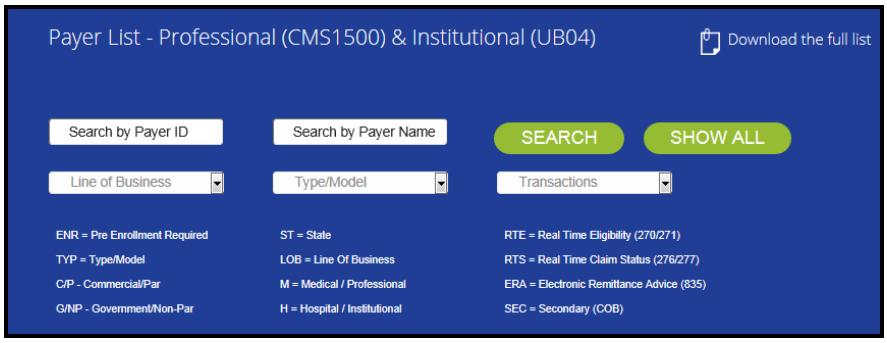
ONLINE CLAIM ENTRY

Professional (HCFA) Claims

Revised 7/12/17

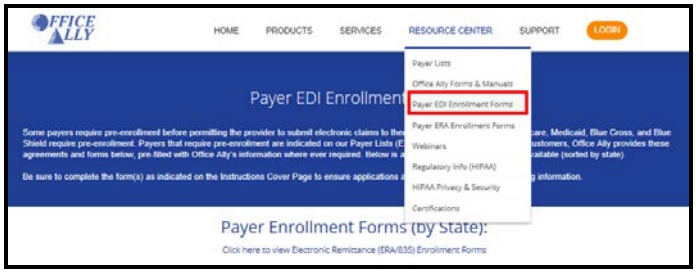
PAYER LIST LOOK UP

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 here.



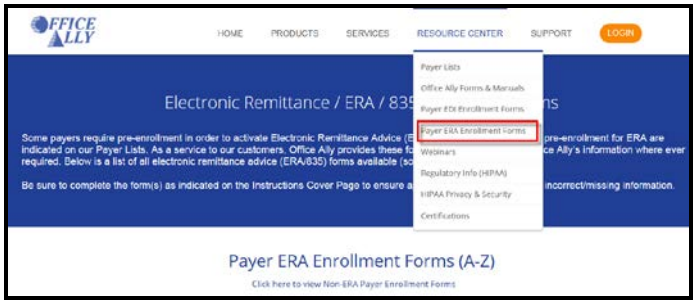
PRE-ENROLLMENT REQUIREMENTS

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 here.



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 here. ERA enrollment forms will be listed alphabetically.



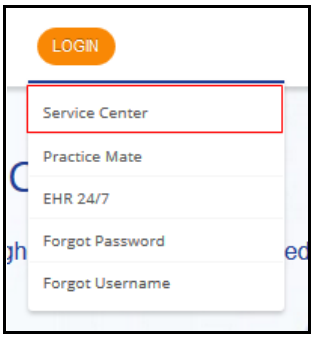
If a payer is not able to receive electronic claims or we don't yet have them available on our payer list, Office Ally can send paper claims on your behalf. In order to activate this feature, the Update Printing Option form will need to be completed. This form is located under Resource Center > Office 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 New Payer Connection Request Form and we will attempt to set the connection up (adding the requested connection is not guaranteed).

LOGGING INTO YOUR ACCOUNT

1. Go to www.officeally.com.

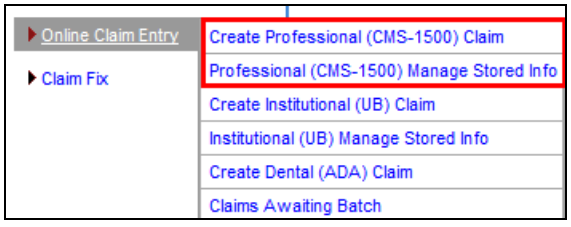
2. Hover your mouse over the **Login** button and select **Service Center**.



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

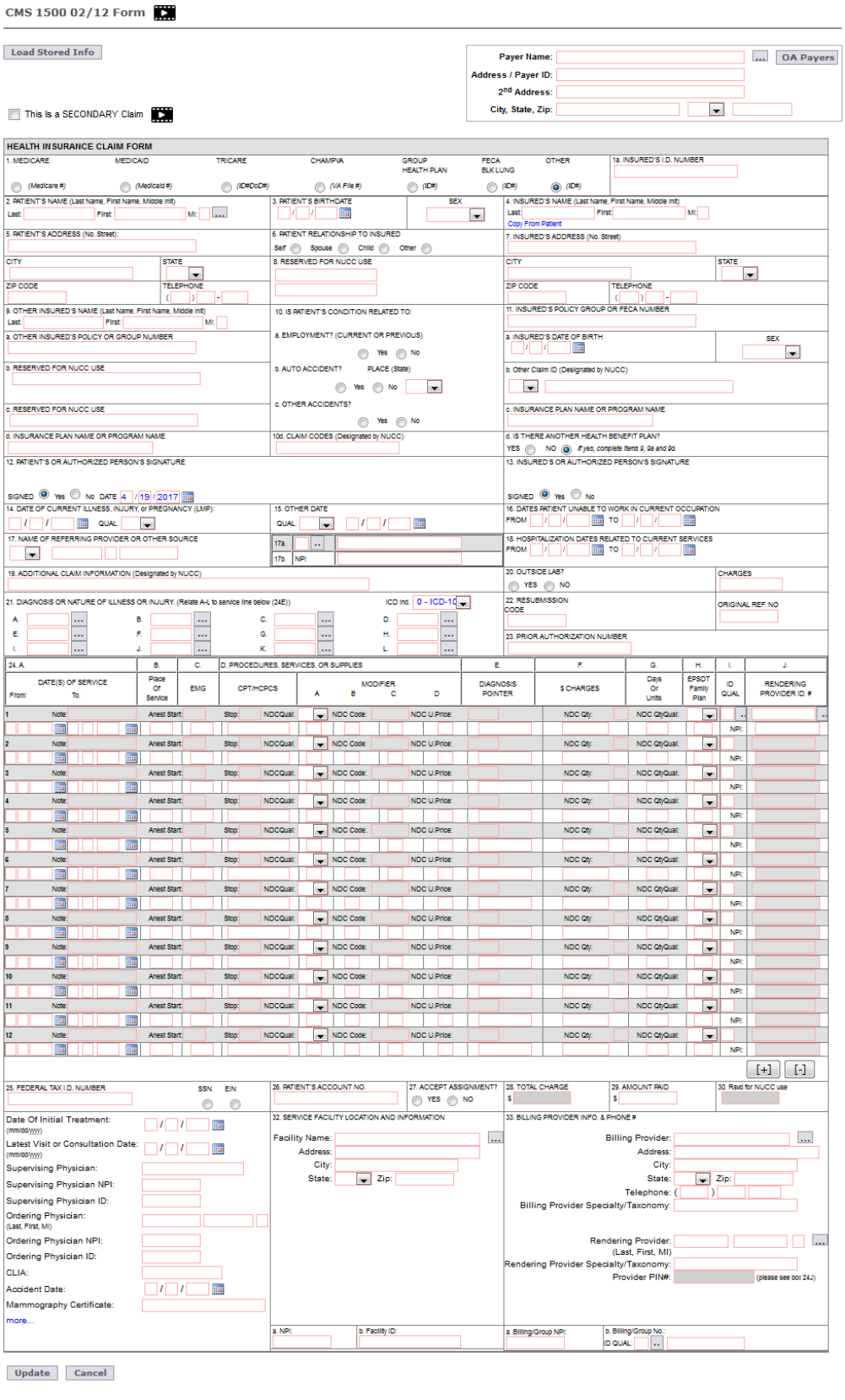
ONLINE CLAIM ENTRY (DIRECT DATA ENTRY)

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 Professional (CMS-1500) Claim** option will allow you to begin completing the online claim form immediately. The **Professional (CMS-1500) 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.



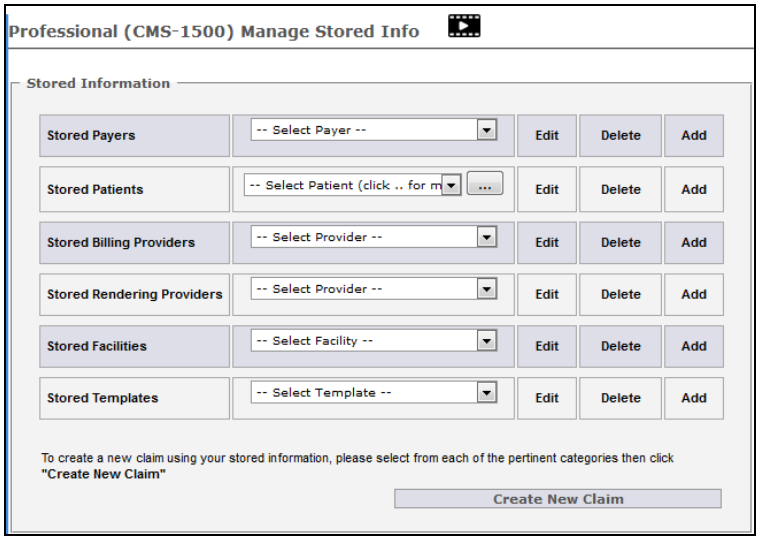
ONLINE CLAIM ENTRY – CREATE PROFESSIONAL (CMS-1500) CLAIM

After selecting **Create Professional (CMS-1500) Claim**, a blank CMS-1500 (HCFA) 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**.

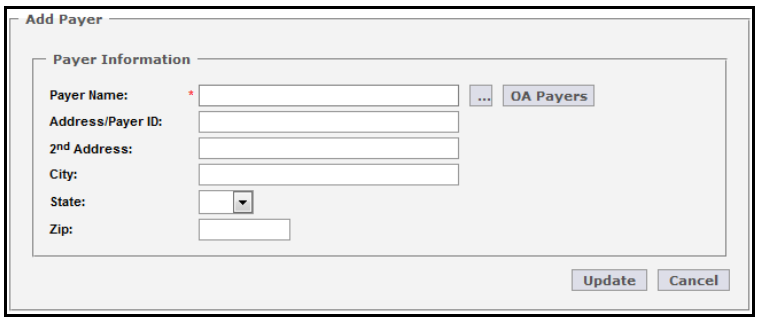


MANAGED STORED INFO

1. To Add, Edit, or Delete stored information, click on **Professional (CMS-1500) Managed Stored Info**. The below screen will appear.

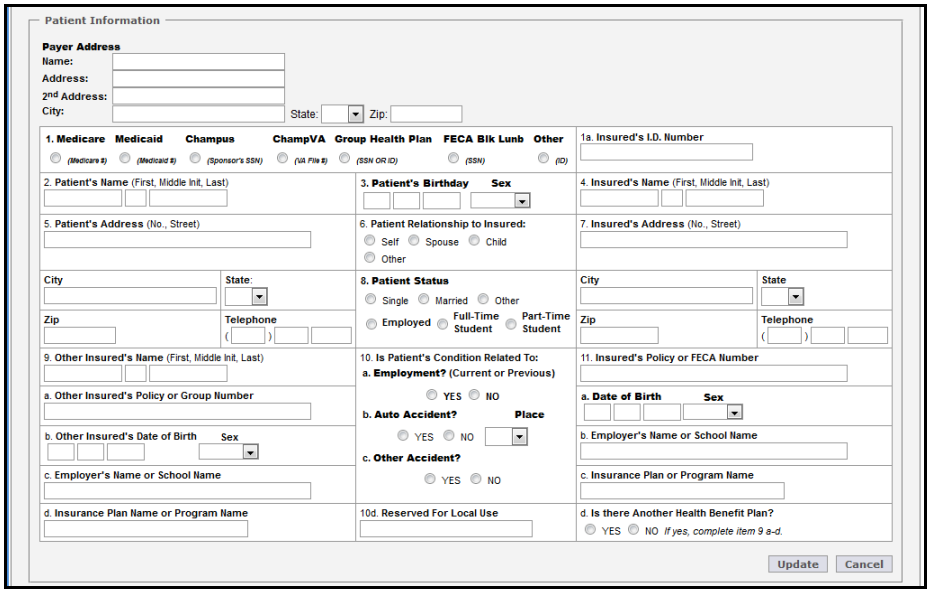


2. Enter the Payer Name, Address (or Payer ID [preferred]), and City/State/Zip under the **Stored Payers** section.

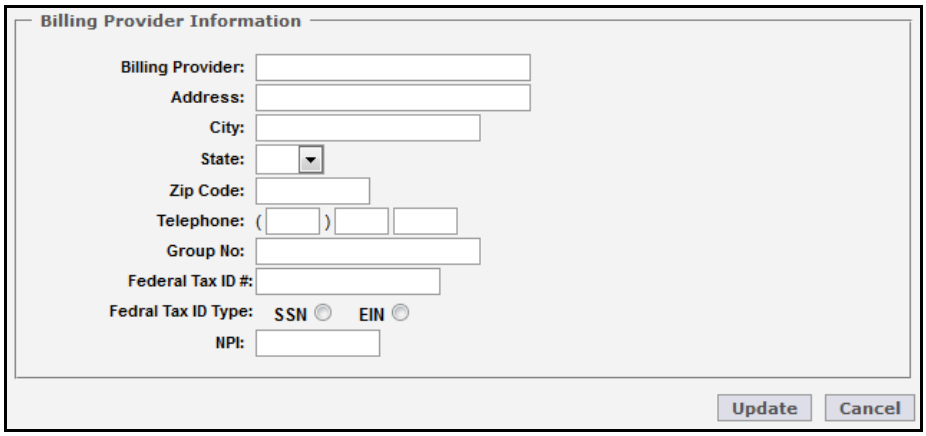


Note: *Click on "OA Payers" to search through our available payer connections*

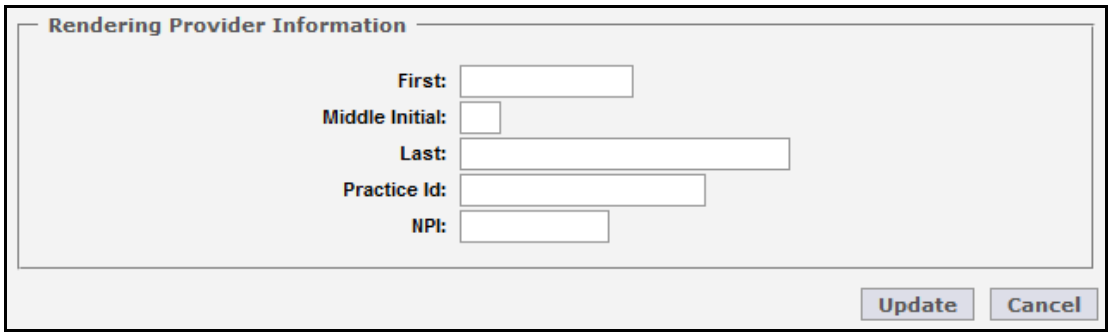
3. Enter the Patient, Payer, Insured's, Other Insured's (COB) data, etc. under the **Stored Patients** section.



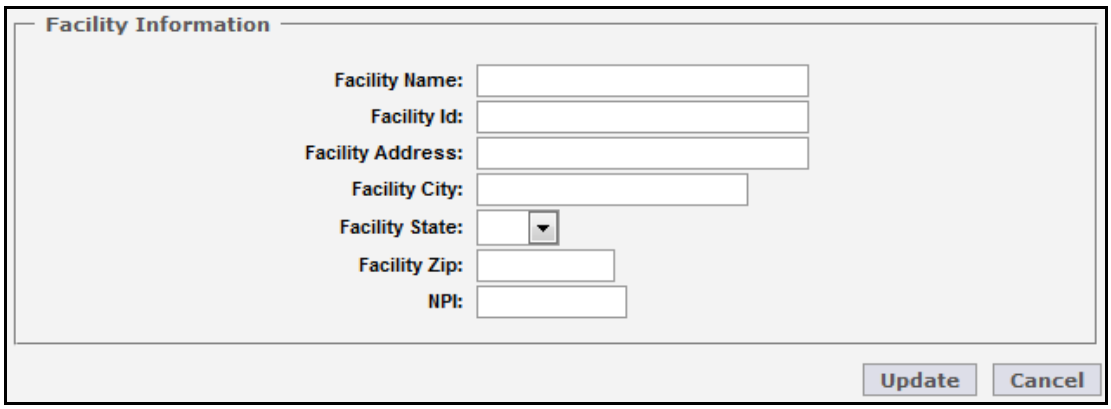
4. Enter the Billing Provider Name, Address, Tax ID, NPI, etc. under the **Stored Billing Providers** section.



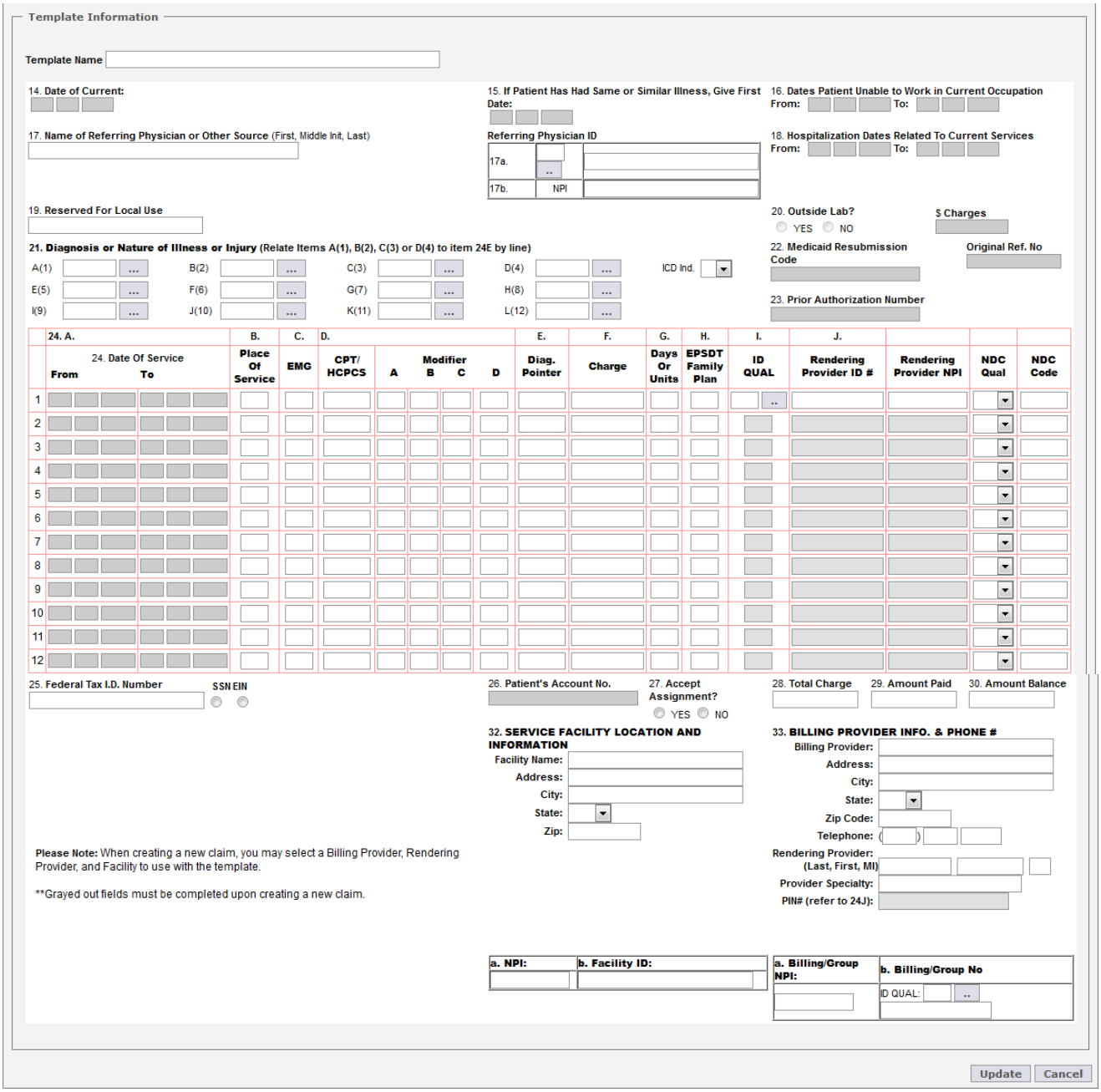
5. Enter the Rendering Provider Name and NPI under the **Stored Rendering Providers** section.



6. Enter the Service Facility Name, Address, and NPI under the **Stored Facilities** section.

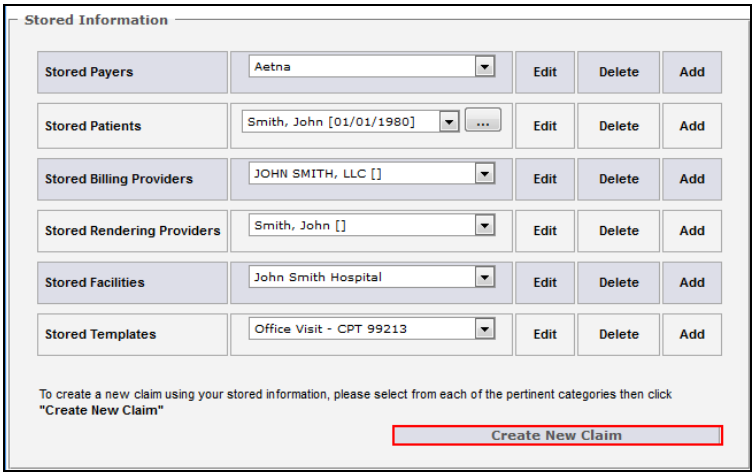


Stored Templates is an optional tool that can help you maximize efficiency when billing. It can be used for storing recurring Diagnosis codes (don't forget to select the ICD indicator), CPT codes, POS, Charges, etc. for a specific patient or for storing commonly used codes for certain types of visits 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.



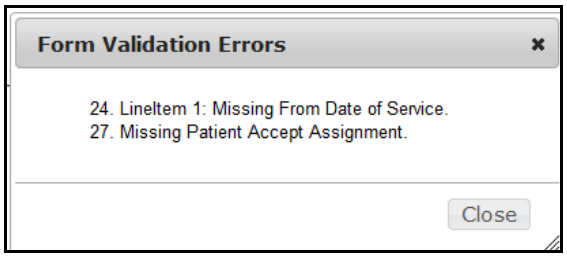
Below is and example of how **Managed Stored Info** is used to create a claim with the stored data you have entered.

1. 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.



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. Date of Service).

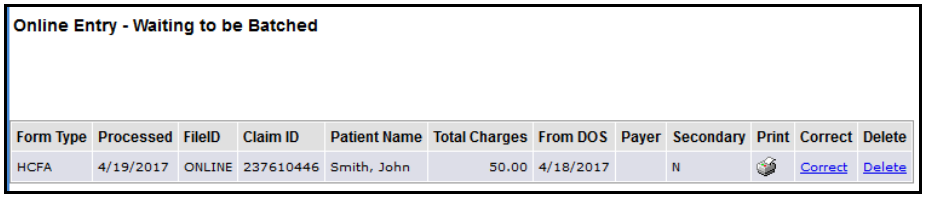
After you enter all necessary claim data, review the claim for errors and then click the **Update** button at the bottom of the claim form. The program will alert you if you missed certain required fields. If all required fields were completed, clicking on **Update** will put your claim in the **Claims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



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**.



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

CONTACT INFORMATION & SUPPORT OPTIONS

Business Hours: Monday thru Friday 6:00am PST to 5:00pm PST
After Hours Support is also available giving you 24/7 coverage!

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
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 HERE or enter https://support.officeally.com/ into your browser to access Live Chat, Claim Rejection Solutions, Troubleshooter, News and more!

Online Video Tutorials: Click HERE or enter http://tv.officeally.com/ into your browser to access video tutorials covering Online Claim Entry, Inventory Reporting, Secondary Claims and more!

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