



Sending Claims Electronically through XClaims (Ims Pro)

Before you begin...

- **Setting your Path**

Make sure that your user path is set in your provider team account,

Provider/Team menu, **Preferences** tab, **Path** tab in the “Default 837 Path (Outbound)” field. If there is another user sending claims, they will do the same. You can create folders such as "Claims Sent" on your desktop and then move the claims files into that folder after sending.

- On the **Group** menu, **Submitter** tab, the clearing house Submitter ID must be set. For IMS Pro, enter “ImsPro” in both fields.

A screenshot of the Easy Billing Professional software interface. At the top, there is a "Group" dropdown menu set to "Medical Clinic of New Mexico". Below this is a navigation bar with tabs: "Name", "Codes", "Contracts", "Payment Options", "Team Linked", "Submitter", "Bank", and "Ledgers". The "Submitter" tab is selected. The main content area shows two input fields. The first field is labeled "Interchange Sender ID (ISA06)" and contains the text "ImsPro". The second field is labeled "Application Senders Code (GS02)" and also contains the text "ImsPro".

- On the Carriers menu, Receiver tab, click the “Create a new Receiver” icon.

IMS Pro Electronic Claims Submission

Search Receiver Billing Accounts

Keywords X All

All

Status X All

- Active
- Alert
- Collection
- Deceased
- Inactive

+ Create a new Receiver

Receiver

EBA1045 IMS Pro

- Enter “IMS Pro” in the name field.

Carriers

ID EBA1045 Account # EBA1045 IMS Pro

Name Contracts Qualifiers Receiver Account Linking Account Ledgers Carrier Ledgers

Insurance Type

- CHAMPVA
- FECA BLK LUNG
- GROUP HEALTH PLAN
- MEDICAID
- OTHER
- TRICARE CHAMPUS

Name EBA1045 Office

IMS Pro

Address (Street & Number, PO Box, Etc...)

Address (Suite, Unit, Apt#, Etc...)

City State Zip Code

Status

- On the Receiver tab, enter “IMSPro” in both the Interchange Receiver ID and Application Receiver’s Code fields.

Carriers

ID EBA1045 Account # EBA1045 IMS Pro

Name Contracts Qualifiers Receiver Account Linking Account Ledgers Carrier Ledgers

Interchange Receiver ID (ISA08)

ImsPro

Application Receiver's Code (GS03)

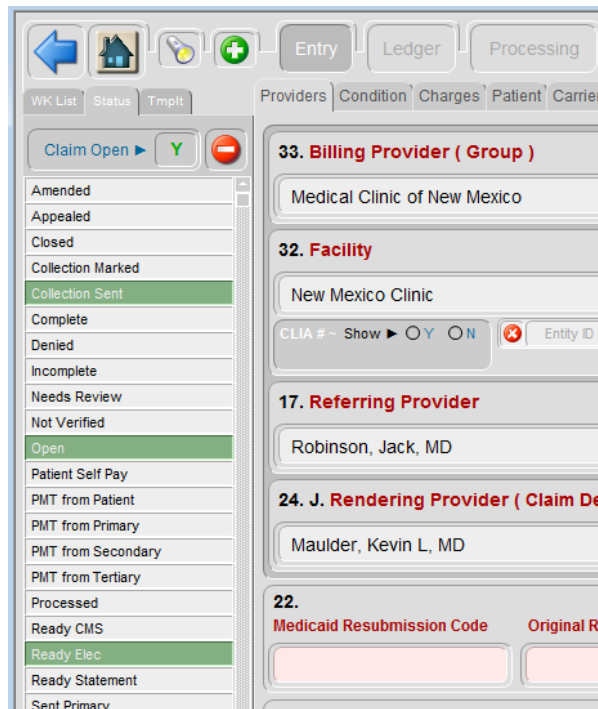
ImsPro

Carrier Type

- Attorney
- Bank
- Billing Account
- Employer
- Guarantor
- Insurance Company
- Manufacturer
- Receiver
- Vendor

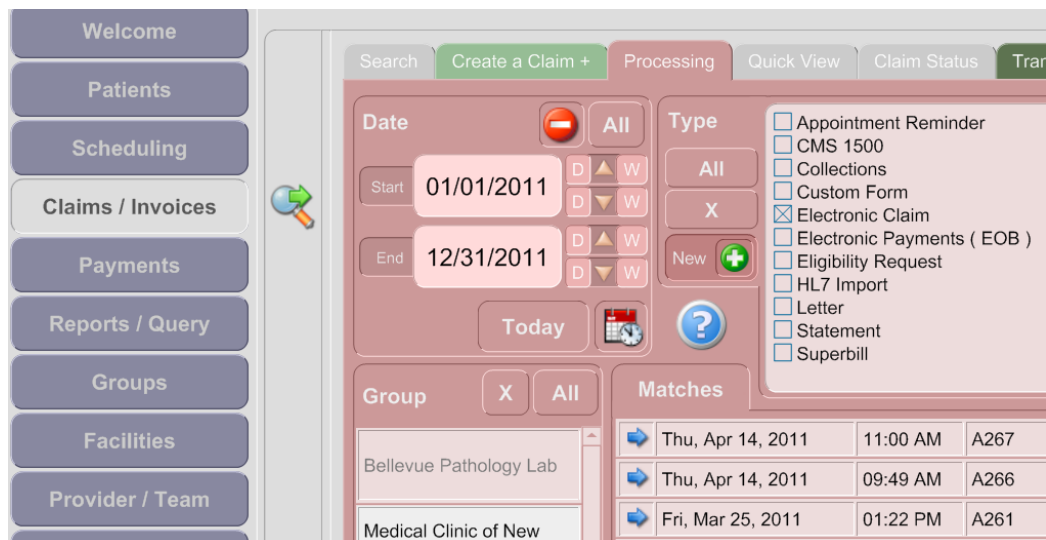
IMS Pro Electronic Claims Submission

- All claims should have "Ready Elec" selected in the **Status** tab after verifying that the claim in the **Charges** tab.



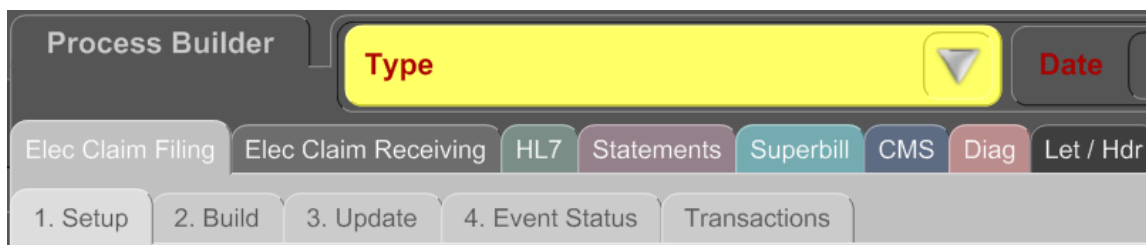
Creating a New Batch Process

- Select the **Claims / Invoices** menu.
- Click the **Processing** tab.
- Click the green plus icon labeled "**New**" to create a new processing event.



IMS Pro Electronic Claims Submission

- On the **1. Setup** tab, click the "Type" yellow field and select "Electronic Claim"



The screenshot shows the 'Process Builder' interface in the '1. Setup' tab. The 'Type' dropdown is set to 'Electronic Claim', and the 'Date' is '04/14/2011'. The 'A267' field is also visible. The interface is divided into several sections:

- A. Select Group:** A dropdown menu showing 'Medical Clinic of New Mexico' and 'MC'. Fields for EIN (853233694), SSN, NPI (1831167196), and Taxonomy (44654654654) are present.
- B. Team Work List:** A dropdown menu showing 'ALL'.
- C. Select Submitter:** A dropdown menu with a yellow background and a 'Sender ID' label.
- D. Select Receiver:** A dropdown menu with a yellow background and a 'Receiver ID' label.
- E. Select Date:** A date field set to '04/14/2011' and a 'Time' field set to '10:00 AM'.
- F. Select Electronic File Specification:** A dropdown menu.
- G. Select Date Range of Claims:** A date range selector.
- Usage Indicator:** Radio buttons for 'P' (Production) and 'T' (Test).
- H. Select Facility:** A dropdown menu with 'Active' and 'Inactive' checkboxes.
- Facility Selection Table:** A table with columns for facility name, state, and NPI.

Select Facility (s) for Claim Link	Override Billing Provider NPI with this Facility NPI
Dr. Whitley & Assoc	WA 6531259841
Family Therapy Group	FT 3213216352
New Mexico Clinic	NM 1831167196
Overland Lab	OL 3214569632
Sharon O'Brien	1356394380

A. Select Group. This field will auto-fill with the default group. Be sure to change the group if you are filing for another group.

B. Team Work List. Select the team members from the drop down list, or "All" for all users.

C. Select Submitter. Click the down arrow and select the group which is submitting

IMS Pro Electronic Claims Submission

the batch.

D. Select Receiver. Click the down arrow and enter "IMS" (for ImsPro) into "Enter Keywords". Click the green arrow next to "ImsPro" to select.

E. Select Date. The date field will auto fill today's date and time.

F. Select Electronic File Specification. Select "837 Health Care Claim."

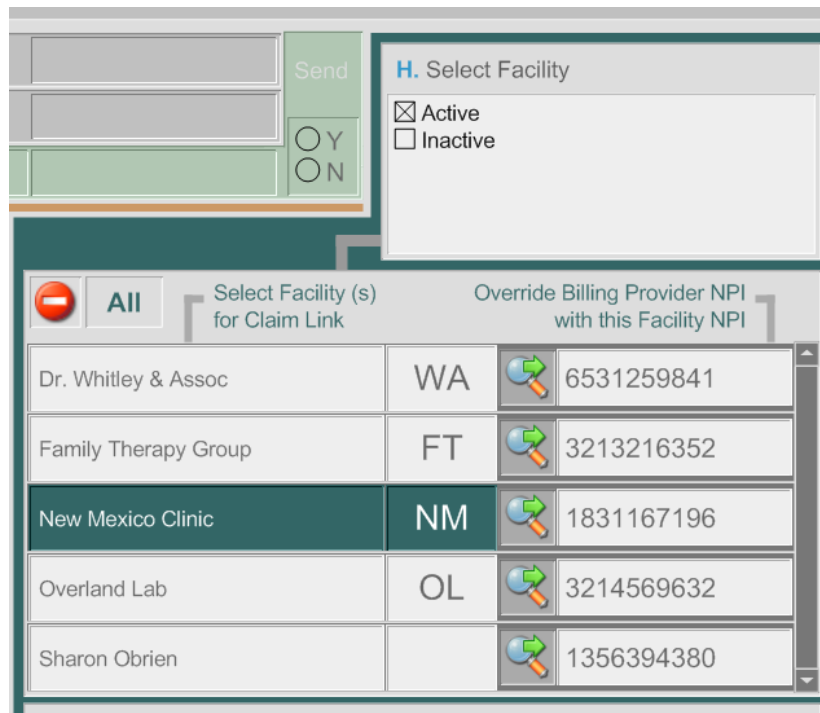
G. Select Date Range of Claims. Click the calendar icon. Click the back arrow of the Month and select the oldest date of claims for this batch. Leave today's date on the right, or click the **ALL** button to select the maximum date range. Click the green check icon to make your selection.



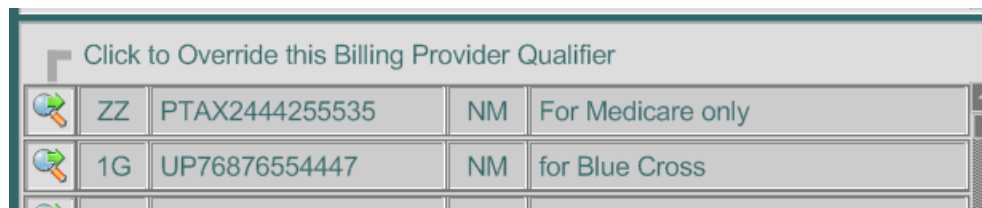
Usage Indicator. Leave this field set to "P" for production.

H. Select Facility, Select ALL Facilities if from same Group, or individually by clicking on name each Facility.

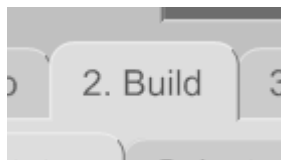
IMS Pro Electronic Claims Submission



- Click the magnifier icon in the column labeled “Click to Override this Billing Provider Qualifier” if the Billing Provider Qualifier needs to be overridden for this batch.



- Select the next tab, **2. Build**



- Under **Select Claim Status**, click the box to the left of "Ready Elec".

IMS Pro Electronic Claims Submission

1. Setup 2. Build 3. Update 4. Event Status Transactions

Claim Status Selected Carrier

A. Select Claim Status

- Amended
- Appealed
- Closed
- Collection Marked
- Collection Sent
- Complete
- Denied
- Incomplete
- Needs Review
- Not Verified
- Open
- Patient Self Pay
- PMT from Patient
- PMT from Primary
- PMT from Secondary
- PMT from Tertiary
- Processed
- Ready CMS
- Ready Elec
- Ready Statement
- Sent Primary
- Sent Secondary
- Sent Tertiary

- To select claims by carrier, go to the **Selected Carrier** tab. Search and select individually the specific carriers.
- To unselect, go to the **Linked** tab.

Elec Claim Filing Elec Claim Receiving HL7 Statements

1. Setup 2. Build 3. Update 4. Event Status Trans

Claim Status Selected Carrier

Search Linked

Keywords All X All

Blue Cross Blue Shield of New Mexico
Choice Plus
Cigna
Cigna Health
Health First
Medicaid of Colorado
Medicare Preferred Care
North American Benefits
Pacificare

- Click the blue and white icon to the right of **B. Build File**. The file name will appear in the top right corner of the window, i.e. A267. This is the file name

IMS Pro Electronic Claims Submission

that will be created in your Default 837 Path to be uploaded into XClaims (IMS Pro).

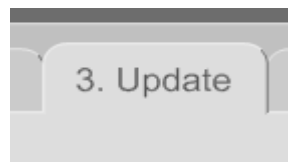


You will see the claims that were created for the batch to be uploaded. The "Claim Count" field will show how many claims are in the batch.

The screenshot shows a table of claims. The table has columns for Hierarchical Loop ID, Claim ID, Date, Amount, and Status. The 'Claim Count' field is highlighted in green and shows the value '15'. The table contains three rows of claims.

Hierarchical Loop ID	Claim ID	Date	Amount	Status
2	CLA5	08/24/09	35.00	1
3	CLA6	08/25/09	35.00	1
5	CLA7	08/26/09	-60.00	1

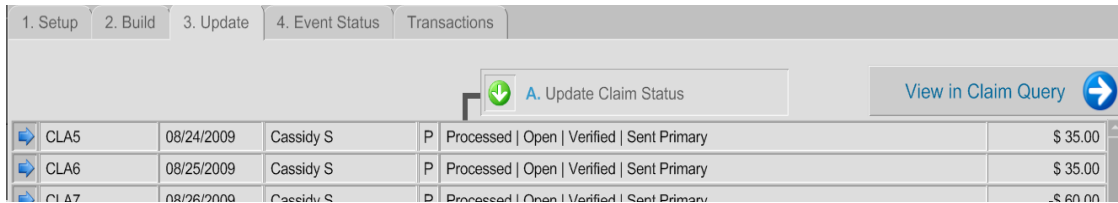
- Select the next tab, **3. Update**



- Click the green down arrow button labeled "**A. Update the Claim Status**" to update the claim status for the claims just created in the batch. This will update

IMS Pro Electronic Claims Submission

the claims and change the status to show that the claims are now "Processed, Open, Verified (if they were verified) and which carrier they were sent to, i.e. Sent Primary, or Secondary, or Tertiary.

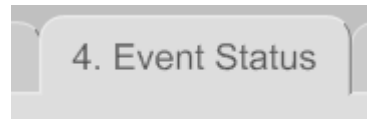


The screenshot shows a software interface with a menu bar at the top containing '1. Setup', '2. Build', '3. Update', '4. Event Status', and 'Transactions'. Below the menu bar is a toolbar with a green arrow icon and a button labeled 'A. Update Claim Status'. To the right of this button is a blue button labeled 'View in Claim Query' with a right-pointing arrow. Below the toolbar is a table with three rows of claim data:

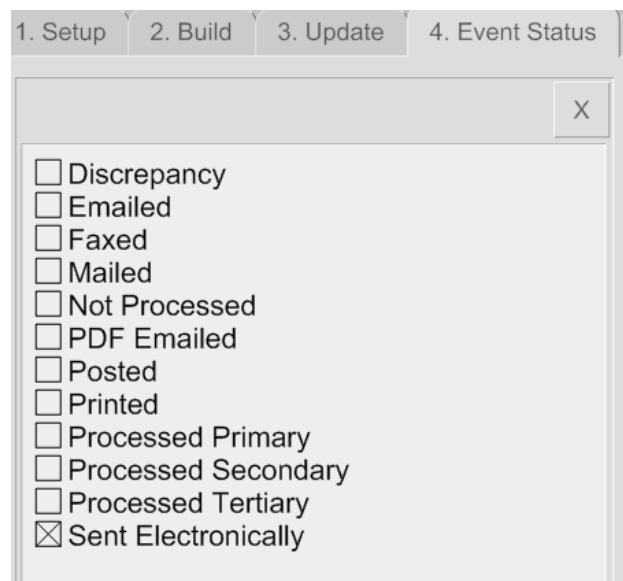
Claim ID	Date	Carrier	Status	Amount
CLA5	08/24/2009	Cassidy S	P Processed Open Verified Sent Primary	\$ 35.00
CLA6	08/25/2009	Cassidy S	P Processed Open Verified Sent Primary	\$ 35.00
CLA7	08/26/2009	Cassidy S	P Processed Open Verified Sent Primary	\$ 60.00

- Click the “View in Claim Query” button to view the claims in the Claim query and run reports.

- Select the next tab, **4. Event Status**



- Click the box to the left of "Sent Electronically".

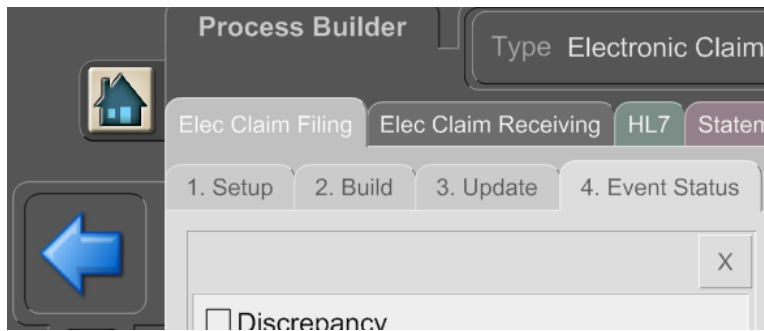


The screenshot shows a dialog box titled '4. Event Status' with a close button (X) in the top right corner. The dialog box contains a list of checkboxes for selecting event status options:

- Discrepancy
- Emailed
- Faxed
- Mailed
- Not Processed
- PDF Emailed
- Posted
- Printed
- Processed Primary
- Processed Secondary
- Processed Tertiary
- Sent Electronically

- Click the large blue arrow to return to the **Processing** tab in **Claims** menu.

IMS Pro Electronic Claims Submission



- Open XClaims and enter your user name and password. Click the **Claims Manager** button on the left. Click the **Transfer Claims** tab; then click "Upload Claims" and choose the file name that was just created, i.e. A267, by double clicking on it. The files will now be in XClaims and will show either Valid, or Invalid. Call IMS Pro to guide you through the rest of the process, or for questions about XClaims.
- Move the file claim file, i.e. A267, to the "Claims Sent" folder on your desktop.