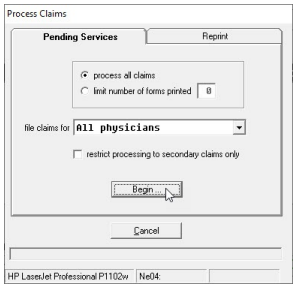
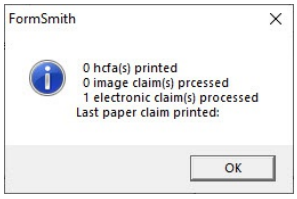
Electronic Claims Processing Checklist

- Process Insurance

  Electronic claims are processed the same way paper claims are processed. The only difference is that the paper claims are sent to the printer to be printed and the electronic claims are sent to computer files.

  Claims | Process Claims ...

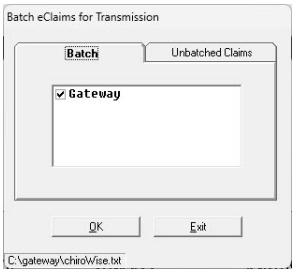




- Batch Claims

  Just as you cannot put paper claims directly in the mailbox without stuffing them into envelopes, electronic claims cannot be sent directly to the clearing house until they are batched. Batching assembles all the claims into a single file for transmission.

  Claims | Batch Claims ...

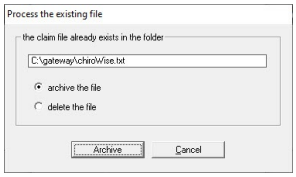


  When the form loads, the name of the clearing house will appear in the window with a check mark beside it. The name of the claim file that will be created will appear in the lower left hand corner.

  Clicking the Unbatched Claims tab will display your unbatched claims. The location of the unbatched claims will appear in the lower left hand corner.

  Click the OK button. Your claims will be batched and the check mark beside the clearing house name will disappear.

  If you get a message that the File Name Already Exists, then your previous claim is still in the clearing house folder. Your options are to either archive or delete the previous claim file.

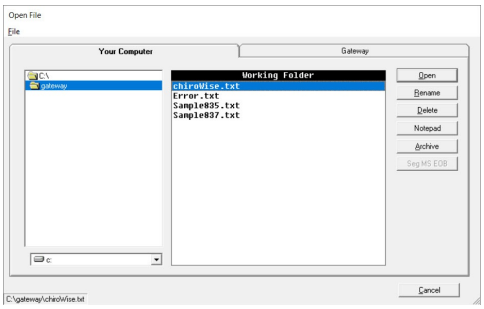


- Print a claim summary (optional)

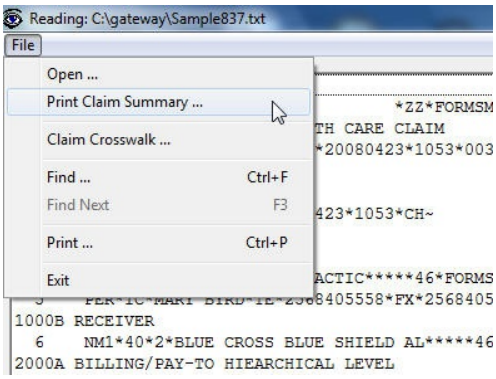
  A claim summary contains a list of claims that are actually in the file that is to be sent to the clearing house and is the only way you will be able to view the claims in the file.

  This report is optional because you should be able to view a list of claims on the clearing house website once the claim is uploaded.

  Claims | EDI reader | File | Open ...



  Click on the claim in the right hand window then click the Open button. With the file opens, click the File menu and choose *Print Claim Summary*



- Upload the claim file to the clearing house (insurance company)

  Claims must be sent to the clearing house in order for you to be paid. This is normally done in one of two ways:

  1. Claims are uploaded by logging into the clearing house website and clicking on the link/button to upload. At this time your reports and remittances should be downloaded. This is how most office upload their claims.

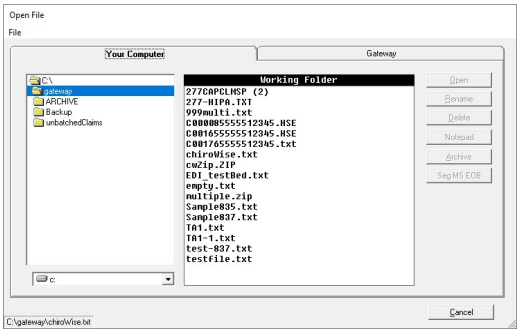
     Note: From time to time the clearing house may insist that you change your SFTP password. If you are logging onto the website to upload your claims, changing your password will not have any affect!

  2. Claims may be uploaded by using the SFTP service provided in FormSmith. Instructions follow.

     Note: To use SFTP, which is very convenient, this usually has to be setup with the clearing house in advance

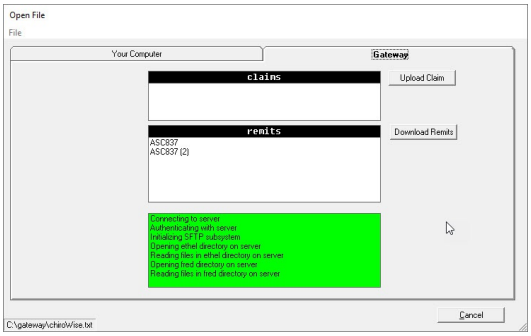
SFTP Claim File Uploads and Report Downloads

Claims | EDI reader | File | Open ...



Then click on the Clearing House tab (Gateway in this example).

FormSmith will automatically attempt to connect to the SFTP website. When the connection window turns green, you are connected.



From here you may upload your claim and download your reports (remittances).

Reports are downloaded into the ‘Working Folder’ on the ‘Your Computer’ tab.

Note: When you upload your claim it may only appear in the claims window for a very short time. The clearing house has “crawlers” that are looking for claims. When a claim is found, it is moved to another location for processing.