# TABLE OF CONTENTS

Service Center User Manual ................................................................................................................................. 1

Table of Contents .................................................................................................................................................. 2

Logging into Office Ally’s Website ......................................................................................................................... 3

Claims Section .......................................................................................................................................................... 4

Upload Claims .......................................................................................................................................................... 4

Online Claim Entry .................................................................................................................................................. 7

Claim Fix .................................................................................................................................................................. 8

Download Section .................................................................................................................................................. 10

Downloading File Summaries ................................................................................................................................. 10

Downloading EDI Reports ....................................................................................................................................... 13

Download EO/ERA 835 ........................................................................................................................................ 14

Requests Section ................................................................................................................................................... 17

Eligibility Request .................................................................................................................................................. 17

Claim Status ........................................................................................................................................................... 19

Reports Section ...................................................................................................................................................... 21

View Claim History Tool ....................................................................................................................................... 21

Inventory Reporting ............................................................................................................................................... 23

Lookup / References Section ................................................................................................................................ 25

Code Search Tool .................................................................................................................................................. 25

Patient Look Up Tool ........................................................................................................................................... 26

Printing Claims ..................................................................................................................................................... 27

Printing Claims Through Claims Awaiting Batch ................................................................................................. 27

Printing Claims through Inventory Reporting ...................................................................................................... 29

Last Updated 2/14/2008
1. On the Internet, go to www.officeally.com

2. Click LOGIN in the orange bar across the page

3. Enter USERNAME and PASSWORD (all lowercase) and click OK
1. When you are logged in to the Office Ally website, click on Upload Claims and Choose Upload HCFA

2. If this is the first time sending, you will need to install an ACTIVE X control. *(IF YOU DO NOT SEE THE BELOW MESSAGE, SKIP TO STEP 4.)*

3. Click on the text in the box and choose Install Active X Control
4. Click the SELECT FILE button
5. Change the LOOK IN: to Desktop then choose the Office Ally folder

**NOTE: THIS ASSUMES THE FILE YOU CREATED FROM YOUR SOFTWARE IS ON YOUR DESKTOP UNDER THE OFFICE ALLY FOLDER. IF THIS IS DIFFERENT IN YOUR SITUATION, PLEASE ADJUST ACCORDINGLY.**

6. Double click on the file you want to upload. This should be the Current Date.
7. The file you chose should now appear in the grey box with a size greater than zero. Click the UPLOAD button

8. Always, always, write down your FILE ID # displayed at the end of each upload for use when calling for technical support from Office Ally. (Every Batch) When you get a page that says, "UPLOAD FILE STATUS," that confirms the file was received.

9. If you get a page that says, "System Message..." that means it may not have worked, so go back to UPLOAD HCFA 1500 and try again. (If this continues please contact Office Ally)
ONLINE CLAIM ENTRY

1. When you are logged in to the Office Ally website, click on Online Claim Entry - HCFA Insert Claim

   Claims
   - Upload Claims
   - Online Claim Entry
     - HCFA Insert Claim
   - Claim Fix
     - HCFA Manage Stored Info
     - UB92 Insert Claim
     - UB02 Manage Stored Info
     - Claims Awaiting Batch

2. For further instructions on how to use Online Claim Entry, please see our Online Entry Instructions. This can be located under Pre-enrollment Forms and Info:

   LookUp / References
   - Patient Look Up
   - Code Search
   - ERA 835 Check Look Up
   - View Payer Lists
   - Pre-Enrollment Forms and Info

3. On this new page, select “Service Center - Online Entry Instructions“ from the manuals listed.
CLAIM FIX

Office Ally now offers the ability to correct certain errors online so that you don’t have to go into your practice management software, fix the claim, regenerate the file, and re-upload. Now you can do this all in one place, Claim Fix.

1. When you are logged in to the Office Ally website, click on Claim Fix: Repairable Claims link on the menu on the left.

   Claims
   ▶ Upload Claims
   ▶ Online Claim Entry
   ▶ Claim Fix

   Repairable Claims
   Claims Awaiting Batch

2. You will get a calendar with pink days showing where there are repairable claims available for review.

   Failed Claims For Monday, February 19, 2007

   There is no data for the selected date.

3. Now click on the claim you would like to correct, an image of a HCFA form with the corresponding information for that claim will be displayed, as well as the error it has been rejected for on the top.
4. Make the necessary correction, depending on the error and make sure to also update any information that is related to that field

*(FOR EXAMPLE: IF YOU DELETE A DIAGNOSIS CODE, MAKE SURE TO DELETE ANY REFERENCES IN BOX 24E DIAGNOSIS CODE POINTERS, THAT POINT TO THAT CODE, OTHERWISE, AFTER YOU RESUBMIT, YOU WILL GET ANOTHER REJECTION FOR INVALID DIAGNOSIS CODE REFERENCE)*

5. Once you’ve made all corrections, click on the Update button at the bottom left of the HCFA image.

6. All claims you have updated are listed under Claim Fix: Claims Awaiting Batch. You DO NOT need to do anything else. These claims are AUTOMATICALLY re-uploaded to Office Ally every night. Once they are uploaded to Office Ally (the next day) they will no longer be listed in Claim Fix: Claims Awaiting Batch and you will receive a new file summary report for the claims that you updated.
DOWNLOAD SECTION

DOWNLOADING FILE SUMMARIES

Once Office Ally has processed your claims (within 72 hours for the first upload, within 24 hours after that) you will receive an email notice that your FILE SUMMARY is ready. Follow the steps below to view your FILE SUMMARY.

1. When you are logged in to the Office Ally website, click on DOWNLOAD FILE SUMMARY link on the menu on the left.

   Download
   - Download File Summary
   - Download EOB / ERA 835

2. You will see a calendar. Click on one of the PINK dates, which indicate a report waiting to be looked at.

   (0) Downloads pending in prior month

   Calendar Legend

   Active Date
   Report(s) To Be Viewed
   Report(s) Viewed

   Notes: This Download File Summary page has been changed to display only File Summary and Payer Response reports. To view EOB and ERA 835 reports, please use page "Download EOB / ERA 835".

3. Below that, the reports available for that day will be listed.
4. In the filename column, if you see the name of the file that you uploaded to OA (e.g. Claims010103), these are FILE SUMMARIES.
5. Below DOWNLOAD/VIEW, you can click the VIEW link to download and view the file.

   Payer | Form Type | File D | File Name | #Accepted | #Pending | #Failed | Total | Download/View
   -----|-----------|--------|-----------|-----------|----------|--------|-------|----------------
   MULTI| HCFA      | 03     | Claims0103| 0         | 7        | 100    | VIEW  |
   MULTI| HCFA      | 190    | Claims0203| 0         | 10       | 200    | VIEW  |
   MULTI| HCFA      | 5      | Claims0303| 0         | 1        | 6      | VIEW  |
   MULTI| HCFA      | 385    | Claims0403| 0         | 15       | 400    | VIEW  |

6. Choose to OPEN/SAVE the file (whichever you choose) and then you can view it and/or print it.
7. This file summary will appear and look similar to below.

Dear Dr. John Smith:

Your claim file has now been processed by Office Ally, and has been forwarded to the appropriate payers:

For final processing. Processing results for your claim file are as follows:

The file ID 77111111 (Q1) was split into 7 files for processing. These files are:

<table>
<thead>
<tr>
<th>File ID</th>
<th>Provider</th>
<th>Claim No.</th>
<th>Total DSO</th>
</tr>
</thead>
<tbody>
<tr>
<td>7711111</td>
<td>Blue Cross CA (BCRA)</td>
<td>4</td>
<td>$3,000.00</td>
</tr>
<tr>
<td>7711111</td>
<td>Cigna Healthcare (Cigna)</td>
<td>2</td>
<td>$1,000.00</td>
</tr>
<tr>
<td>7711111</td>
<td>Horizon Health (Horizon)</td>
<td>5</td>
<td>$1,012.00</td>
</tr>
<tr>
<td>7711111</td>
<td>Predominant PA (PPO)</td>
<td>1</td>
<td>$900.00</td>
</tr>
<tr>
<td>7711111</td>
<td>United Healthcare (UHC)</td>
<td>1</td>
<td>$220.00</td>
</tr>
<tr>
<td>7711111</td>
<td>Universal Care (UC)</td>
<td>1</td>
<td>$750.00</td>
</tr>
</tbody>
</table>

Multiple Payer Uploaded File Summary

File names: 77111111, 77111111, 77111111, 77111111, 77111111, 77111111, 77111111

Date uploaded: 03/01/2006

Date processed: 03/04/2006

- File(s) finally sent on to payer.
- File(s) still pending.
- File(s) rejected.

8. This file summary report will list all claims that were in the file you uploaded and it lets you know which claims were:

- **Accepted** - Sent on to Payer.
- **Pending** - Rejected for "Patient not Covered" or "Patient not Found", we will hold onto these claims and reprocesses every 7 days for 3 tries, in case it’s just a matter of the patient eligibility file not being up to date. If not found by the 3rd retry, it will be rejected back to you.
• Rejected - Rejected for specific reason, noted on the report so that you can correct and resubmit.

<table>
<thead>
<tr>
<th>CLAIM OA CLARED</th>
<th>PATIENT ID</th>
<th>LAST, FIRST</th>
<th>DOD</th>
<th>FROIN DOD</th>
<th>TO DOD</th>
<th>OPT</th>
<th>CIDR</th>
<th>TAX ID</th>
<th>ACOUNT</th>
<th>PHYS, ID</th>
<th>PACE</th>
<th>ERRORS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1) 3712111 3712111 John Smith 09/27/2002 12/31/06 01/01/07 00000</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2) 3712111 3712111 John Smith 09/21/2001 12/31/06 01/01/07 00000</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3) 3712111 3712111 John Smith 12/31/2006 01/01/07 01/01/07 00000</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4) 3712111 3712111 John Smith 01/01/2004 02/28/06 02/28/06 00000</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

• Note the error code column on the right of the “Error Claim Detail” section

Errors
- RC23, FP01
- LCI246
- LCI249
- LCI1698

• These codes are explained above the “Error Claim Detail” section

9. Once a file summary has been downloaded and viewed, it will turn purple and no longer be pink, indicating it has been viewed.

Make sure to check ALL file summaries on a regular basis. There should never be any pink days left in DOWNLOAD FILE SUMMARY. Claims that are rejected back to you are your responsibility to correct and resubmit if needed.

These reports will be available to download for one year from the date it appears on.
DOWNLOADING EDI REPORTS

[filename starts with EDI_CLAIM_REPORT or NA (Blue Cross)]

Once the payer has processed your claims, some payers send back a confirmation or error message depending on whether the claim passed or failed. Any message we receive from the payers will be passed onto you in the form of an EDI Report. Follow the steps below to view your EDI Report.

1. When you are logged in to the Office Ally website, click on DOWNLOAD FILE SUMMARY link on the menu on the left.
   - Download
     - Download File Summary
     - Download EOB / ERA 835

2. You will see a calendar. Click on one of the PINK dates, which indicate a report waiting to be looked at.
3. Below that, the reports available for that day will be listed.

   (0) Downloads pending in prior month
   
<p>| | | | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>S</td>
<td>M</td>
<td>T</td>
<td>W</td>
<td>T</td>
<td>F</td>
</tr>
<tr>
<td>1 2 3 4</td>
<td>5 6 7 8 9 10 11</td>
<td>12 13 14 15 16 17 18</td>
<td>19 20 21 22 23 24 25</td>
<td>26 27 28 29 30</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

   Notes: This Download File Summary page has been changed to display only File Summary and Payer Response reports. To view EOB and ERA 835 reports, please use page "Download EOB / ERA 835".

4. In the filename column, if you see any that start with EDI_CLAIM_REPORT, these are EDI Reports.
5. Below DOWNLOAD/VIEW, you can click the VIEW link to download and view the file.

<table>
<thead>
<tr>
<th>Payment Type</th>
<th>File ID</th>
<th>File Name</th>
<th>#Accepted</th>
<th>#Pending</th>
<th>#Failed</th>
<th>Total</th>
<th>Download/View</th>
</tr>
</thead>
<tbody>
<tr>
<td>MULTI Payer Response</td>
<td>_EDI_STATUS_20061107.txt</td>
<td>8436</td>
<td>0</td>
<td>331</td>
<td>8767</td>
<td>VIEW</td>
<td></td>
</tr>
</tbody>
</table>

6. Choose to OPEN/SAVE the file (whichever you choose) and then you can view it and/or print it.

   ![File Download Dialog]

   Do you want to open or save this file?

   Name: _EDI_STATUS_20061107.txt
   Type: Text Document
   From: www.officeally.com

   Open Save Cancel

   While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save the file. What's the risk?

7. This EDI Report will list any messages Office Ally has received from the payer for this account on whichever day it appears on.
8. These EDI Reports will be available to download for one year from the date it appears on.
Did you recently receive a Medicare check without a paper EOB? If so, Medicare is sending you an Electronic File called an “ERA 835” instead of your paper EOBs.

This file is a non-readable file! You must have some kind of software to load the non-readable file. If you don’t have any software to do this, you may download Medicare’s Free Easy Print Software.

We give you the ERA file from Medicare. You load it into the software to view your EOB!

**STEP 1: DOWNLOAD MEDICARE’S FREE EASY PRINT SOFTWARE**

*IF YOU NEED HELP DOWNLOADING OR INSTALLING MEDICARE’S SOFTWARE, PLEASE CALL MEDICARE AT (213) 593-6950 AND THEY WILL WALK YOU THROUGH THE INSTALLATION.*

1. GO TO [http://www.cms.hhs.gov/AccessToDataApplication/02_MedicareRemitEasyPrint.asp#TopOfPage](http://www.cms.hhs.gov/AccessToDataApplication/02_MedicareRemitEasyPrint.asp#TopOfPage)
2. Scroll to the bottom of the page and under Related Links Outside CMS, then click on the first link named: Download Information for .Net Framework.

This will take you to a Microsoft page; you will then want to click on download in the blue area that appears on this page. This .NET is required before you download the Remit Easy Print.

3. Next, go back to Medicare screen, where you downloaded the .Net, and scroll up till you see DOWNLOADS and under DOWNLOADS you will find Medicare Remit Easy Print - Version 2.3
4. Double click the Medicare Easy Print Icon, and follow the prompts to install this.
5. Make sure you make a note of where you are installing this software so you can access it later!

**STEP 2: ACCESS THE ERA 835 FILE FROM OFFICE ALLY**

1. Log-in to www.officeally.com
2. On the left side click Download EOB/ERA 835, you should now see a calendar at the top of the page; we receive ERA’s from Medicare daily.

   Download
   - Download File Summary
   - Download EOB / ERA 835

**NOTE:** If you cannot find any ERA_STATUS reports in your Download EOB/ERA 835 section, please call Office Ally @ (949) 464-9129 option 1. Have your Medicare Provider Number with you when you call and let us know that you cannot find your ERA_STATUS reports.
3. Change the Report Mode to MONTHLY, then choose the month you would like to search for ERAs in. Change the Report Type to ERA 835 (multiple payers) and click GO.

```
<table>
<thead>
<tr>
<th>Report Mode:</th>
<th>Monthly</th>
<th>September</th>
<th>2007</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report Type:</td>
<td>ERA 835 (multiple payers)</td>
<td>Go</td>
<td></td>
</tr>
</tbody>
</table>
```

Please use the calendar (left) to view daily report or for advanced report options, select criteria above then click Go.

4. Any ERAs linked to your account for the month chosen will be displayed.

```
<table>
<thead>
<tr>
<th>&lt;&lt; March 2007 &gt;&gt;</th>
</tr>
</thead>
<tbody>
<tr>
<td>S M T W T F S</td>
</tr>
<tr>
<td>1 2 3</td>
</tr>
<tr>
<td>4 5 6 7 8 9 10</td>
</tr>
<tr>
<td>11 12 13</td>
</tr>
<tr>
<td>14 15 16 17</td>
</tr>
<tr>
<td>18 19 20 21 22 23 24</td>
</tr>
</tbody>
</table>

Report Legend

- File(s) Pending
- File(s) Downgraded

<table>
<thead>
<tr>
<th>Report Mode:</th>
<th>Daily</th>
<th>3 13 2007</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report Type:</td>
<td>-- All --</td>
<td>Go</td>
</tr>
</tbody>
</table>
```

Please use the calendar (left) to view daily report or for advanced report options, select criteria above then click Go.

5. Click VIEW (scroll to the right if you don't see “View”)

**Daily EOB / ERA 835 Reports for 3/13/2007 - [Report Type = All]**

<table>
<thead>
<tr>
<th>Date</th>
<th>Report Type</th>
<th>File ID</th>
<th>File Name</th>
<th>EOB ID</th>
<th># Claims</th>
<th>Download/View</th>
</tr>
</thead>
<tbody>
<tr>
<td>3/13/2007</td>
<td>ERA 835</td>
<td></td>
<td>_ERA_STATUS_20070313.zip</td>
<td></td>
<td>51</td>
<td>VIEW</td>
</tr>
</tbody>
</table>

**NOTE:** If you get an error here that your computer is not able to open the .zip file, it is because you need to install WinZip on your computer.

- You can get this program by going to [www.winzip.com](http://www.winzip.com).
- Click on the red ‘TRY NOW’ button on the right side of the page.
- Then click on the red “Try WinZip” button on the next page.
- Go through the installation process until it is installed on your computer.
- Once completed, you will need to close out of all of your Internet Explorer screens to enable the WinZip program.
- Then go back to #1 above and repeat the process of accessing the ERA 835 file from Office Ally.

6. Click OPEN

7. You will see a WinZip Box on your screen – you may need to click “Use Evaluation Version”

8. You will see two files on your screen – one says ERA_STATUS, one says ERA_835

9. Drag the file ERA_835 to your desktop
STEP 3: LOAD THE ERA_835 INTO YOU EASY PRINT SOFTWARE

1. Open Medicare’s Easy Print Software
2. Click, “Import”
3. Click, “Desktop” on the left
4. Within the white window open, double click the 835 file
5. You will now see a list of patients with check boxes by their names. Check some or all of the boxes.
6. Click “claim detail” You will see your EOB!!

Feel Free to Call Office Ally at 949.464.9129 with any questions you may have!!
REQUESTS SECTION

ELIGIBILITY REQUEST

1. To check the status of a patient for Eligibility, click on Eligibility Request, Add Eligibility Request.

   Requests
   - Eligibility Request: Add Eligibility Request
   - Claim Status Request: View Eligibility Requests/Responses

2. Fill out the form, and select the Payer from the list of available Payers. Once you have completed the form, click on the Add Request box.

   [ Add Eligibility Request ] [ View Eligibility Requests/Responses ]

   ![Add Eligibility Request Form]

   Notes: Please enter in all required fields to request eligibility. Payers with "(*)" indicator will provide immediate (Real-Time) responses, all others will be requested by batch and typically will receive responses within a few hours.

   [ Add Eligibility Request ] [ View Eligibility Requests/Responses ]

3. Payers with a "**" to the right of the name will provide immediately responses. If not, it can take up to 24 hours to check the status.

4. To check the status of your request click on Eligibility Request, View Eligibility Request/Responses from the Available Services menu on your left.

   Requests
   - Eligibility Request: Add Eligibility Request
   - Claim Status Request: View Eligibility Requests/Responses
5. You will then see the screenshot below. Below the View Requests, you want to click on Processed Requests if the value is greater than 0. This means the Payer(s) have responded. On the next screen you will then have the option to view the response from the Payer.

[ Add Eligibility Request ] [ View Eligibility Requests/Responses ]

View Eligibility Requests/Response

View Requests
Processed Requests 0
Failed Requests 0
Requests Awaiting Response 0
Requests Awaiting Batch 0

Search for Requests
Name: F L
Name Type: Subscriber □ Patient □ Both □
Subscriber Id: 
Date Of Service: □ / □ / □ □ (mm/dd/yyyy)
Payer: -- Select One --
Provider Name: 
Tax Id: 

[ Add Eligibility Request ] [ View Eligibility Requests/Responses ]
1. To check the status of your claims from Payers that support this feature, click on Claim Status Request, Add Status Request from the Available Services menu on your left.

   Requests
   ▶ Eligibility Request
   ▶ Claim Status Request: Add Status Requests
   View Status Requests/Responses

2. Select the Payer that you want to check the Claim Status on. Complete the rest of the form, and click on Search.

   [ Add Status Requests ] [ View Status Requests/Responses ]

3. Payers with a "*" to the right of the name will provide immediately responses. If not, it can take up to 24 hours to check the status.

4. To check the status of your request click on Claim Status Request, View Eligibility Request/Responses from the Available Services menu on your left.

   Requests
   ▶ Eligibility Request
   ▶ Claim Status Request: Add Status Requests
   View Status Requests/Responses
5. You will then see the screenshot below. Below the View Requests, you want to click on Processed Requests if the value is greater than 0. This means the Payer(s) have responded. On the next screen you will then have the option to view the response from the Payer.

<table>
<thead>
<tr>
<th>View Status Requests/Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Processed Requests: Finalized</td>
</tr>
<tr>
<td>Processed Requests: Not Finalized</td>
</tr>
<tr>
<td>Failed Requests</td>
</tr>
<tr>
<td>Requests Awaiting Response</td>
</tr>
<tr>
<td>Requests Awaiting Batch</td>
</tr>
</tbody>
</table>

[ Add Status Requests ] [ View Status Requests/Responses ]
REPORTS SECTION

VIEW CLAIM HISTORY TOOL

The View Claim History Tool can be used to look up claim for a Specific Patient.

1. Click on View Claim History.

   **Reports**
   - View Claim History
   - Inventory Reporting

2. Enter information in fields that you want to search (e.g. if you want to pull up ALL claims submitted for a specific patient, type in their Patient Account # or their name):

   ![Claim Search Form]

   - **First Name:**
   - **Last Name:**
   - **Pat Account Number:**
   - **Insured ID Number:**
   - **From Date of Service:**
   - **To Date of Service:**

   ![Claim Search Table]

3. Click Submit

4. It will pull up all claims that match the criteria you specified in step 2.
5. Click on CH to view the detail claim history.

<table>
<thead>
<tr>
<th>File Name</th>
<th>Date Received</th>
<th>Date Processed</th>
<th>Total</th>
<th>Failed</th>
<th>Status Description</th>
</tr>
</thead>
</table>

| Claim Status: |
| CLAIM PROCESSED |

<table>
<thead>
<tr>
<th>File Name</th>
<th>Date Received</th>
<th>Date Processed</th>
<th>Total</th>
<th>Failed</th>
<th>Status Description</th>
</tr>
</thead>
</table>

| Claim Status: |
| CLAIM PROCESSED |

<table>
<thead>
<tr>
<th>File Name</th>
<th>Date Received</th>
<th>Date Processed</th>
<th>Total</th>
<th>Failed</th>
<th>Status Description</th>
</tr>
</thead>
</table>

| Claim Status: |
| DUPLICATE CLAIM (WITHIN 90 DAYS) |

<table>
<thead>
<tr>
<th>File Name</th>
<th>Date Received</th>
<th>Date Processed</th>
<th>Total</th>
<th>Failed</th>
<th>Status Description</th>
</tr>
</thead>
</table>

| Claim Status: |
| DUPLICATE CLAIM (WITHIN 90 DAYS) |

<table>
<thead>
<tr>
<th>File Name</th>
<th>Date Received</th>
<th>Date Processed</th>
<th>Total</th>
<th>Failed</th>
<th>Status Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>BCSGA</td>
<td>1/31/2007 1/31/2007</td>
<td>1/31/2007 1/31/2007</td>
<td>82.00</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Claim Status: |
| DUPLICATE CLAIM (WITHIN 90 DAYS) |
INVENTORY REPORTING

The Inventory Reporting Tool is very similar to the View Claim History Tool except there are more criteria available to you to search by.

1. Click on Inventory Reporting.

2. You can specify:
   - Payer
   - From Date and To Date for: Date of Service, Upload Date or Date Processed
   - Status (All statuses, Passed, Pending, Rejected)

   **If you choose to search only rejected status, you can also choose to only search for a specific rejection**
   - Master Vendor (Tax ID)
   - State License ID (ID on claim)
   - Patient Last Name
   - Patient First Name
   - Patient Account Number
   - Insured ID
   - Office Ally’s File ID
   - Office Ally’s Claim ID
   - CPT Codes
   - Diagnosis Codes
   - Submission Type (Electronic or Printed)
   - Sort By (You can choose to sort by various fields)
3. You can also choose what you want the results to be sorted by (choosing claim ID here should order the results by when they came to Office Ally)
4. Once you've entered all you criteria, click Search.
5. All claims that match your criteria will display, they will look similar to this:

<table>
<thead>
<tr>
<th>Status</th>
<th>Claim ID</th>
<th>Claim ID</th>
<th>Payer ID</th>
<th>Claim ID</th>
<th>Received Date</th>
<th>Patient Name (Last, First)</th>
<th>Patient Account No.</th>
<th>Gross DOS</th>
<th>% DOS</th>
<th>Vendor ID</th>
<th>Claim ID</th>
<th>Insured ID</th>
<th>Total Charge</th>
<th>Print</th>
<th>Error Code(s)</th>
</tr>
</thead>
</table>

6. To see a HCFA image of what Office Ally has on file for that claim, left click on the Claim ID
7. Once you have the claim image open (sample below) above the image any status messages for that claim will appear. If rejected, the reason will display as well as the date when it was rejected.
LOOKUP / REFERENCES SECTION

CODE SEARCH TOOL

The Code Search Tool can be used to check what codes (ICD9, CPT, Place of Service, and Modifiers) Office Ally shows as billable at the time.

1. Click on Code Search

   LookUp / References
   ▸ Patient Look Up
   ▸ Code Search
   ▸ ERA 835 Check Look Up
   ▸ View Payer Lists
   ▸ Pre-Enrollment Forms and Info

2. Choose the TYPE of code you would like to search for.
3. Choose the method of searching you would like to use.
4. Type in your search.

   Code Search

   Search Options

   ICD9 ▼
   Begins With ▼
   Code: □ Description: □

   Please enter the search criteria then click ‘Search’. [Search]

5. Click on the Submit button to display your results, I searched for any ICD9 containing V45.0 and received these results. If “Is Billable” is Yes or blank, the code is valid. If it says No, it is not.
The Patient Look Up Tool can be used to verify Patient Eligibility

1. Click on Patient Look Up.

LookUp / References
- Patient Look Up
- Code Search
- ERA 335 Check Look Up
- View Payer Lists
- Pre-Enrollment Forms and Info

*READ DISCLAIMER AND CLICK I AGREE TO GO ON.*

2. Select which Payer’s Patient Eligibility you would like to check.
3. Enter Date of Service.
4. Choose Name/DOB, MemberID, or Patient SSN to indicate what you want to search by.
5. Type in necessary fields.
6. Click Look Up.

*PATIENT LOOK UP IS ONLY AVAILABLE FOR PAYERS FOR WHOM WE CHECK PATIENT ELIGIBILITY.*
PRINTING CLAIMS THROUGH CLAIMS AWAITING BATCH

1. Navigate to Online Claim Entry – Claims Awaiting Batch
2. Note: You can also get there by going to Claim Fix – Claims Awaiting Batch

<table>
<thead>
<tr>
<th>Claims</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online Claim Entry</td>
</tr>
<tr>
<td>Claim Fix</td>
</tr>
<tr>
<td>Upload Claims</td>
</tr>
<tr>
<td>HCPA Insert Claim</td>
</tr>
<tr>
<td>HCPA Manage Stored Info</td>
</tr>
<tr>
<td>UB92 Insert Claim</td>
</tr>
<tr>
<td>UB92 Manage Stored Info</td>
</tr>
<tr>
<td>Claims Awaiting Batch</td>
</tr>
</tbody>
</table>

3. You will see any claims that have recently been submitted to Office Ally listed as follows:
4. Click on the Printer symbol

**Online Entry - Waiting to be Batched**

<table>
<thead>
<tr>
<th>Form Type</th>
<th>Processed</th>
<th>FileID</th>
<th>Claim ID</th>
<th>Patient Name</th>
<th>Total Charges</th>
<th>From DOS</th>
<th>Primary</th>
<th>Secondary</th>
<th>Print</th>
<th>Correct</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>HCPA</td>
<td>9/4/2007</td>
<td>ONLINE</td>
<td></td>
<td></td>
<td>50.00</td>
<td>9/2/2007</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Please note that claims may or may not appear here in this section depending on when the Office Ally system processed your claims. If they were already processed, you will not see them in Claims Awaiting Batch. Please check the next section in the manual referring to Printing Claims through Inventory Reporting.

5. After choosing the printer symbol, a new screen will pop up showing a PDF version of the HCFA

Please note this assumes you have Adobe Acrobat Reader installed on your system and that you are using the latest version of Internet Explorer. This printing feature does not work on a MAC Operating System.

6. Choose the print symbol highlighted in red to print the entire HCFA.
Please note this will print the entire HCFA so please DO NOT use pre-printed forms when printing. Instead, use plain blank paper and the system will print the HCFA and the information for you.
PRINTING CLAIMS THROUGH INVENTORY REPORTING.

Printing claims through Inventory Reporting will allow you to print any claims that have been processed through Office Ally back seven years.

1. Click on the Inventory Reporting link.

   Reports
   ▶ View Claim History
   ▶ Inventory Reporting

2. Search for your claims normally using the inventory reporting screen. For further details, please see section Inventory Reporting here in the User Manual.

3. You will see your search results listed below. Click on a claim ID of your choosing.

4. After clicking on the Claim ID, the claim will appear in a new window. You will see the entire HCFA.
5. Scroll to the bottom of the displayed HCFA and choose one of your options.

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>25. FEDERAL TAX I.D. NUMBER</td>
<td>SSN</td>
<td>EIN</td>
</tr>
<tr>
<td>31. SIGNATURE OF PHYSICIAN OR SUPPLIER INCLUDING DEGREES OR CREDENTIALS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SIGNED</td>
<td></td>
<td>DATE</td>
</tr>
<tr>
<td>26. PATIENT’S ACCOUNT NO.</td>
<td>27. ACCEPT ASSIGN</td>
<td></td>
</tr>
<tr>
<td>X</td>
<td>YES</td>
<td>NO</td>
</tr>
<tr>
<td>32. SERVICE FACILITY LOCATION AND INFORMATION</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

a. NPI:  
b. Facility ID:

[Print Claim Image]  [Print To PDF File]

Note:

**Print Claim Image** – This will allow you to print just the information from the HCFA without the lines. Use this option if you are able to get the image output on your printer to properly match up with your HCFA form.

**Print To PDF File** – This will allow you to print the entire claim on blank paper. It will make a PDF form of your document that is printable.

Please note this assumes you have Adobe Acrobat Reader installed on your system and that you are using the latest version of Internet Explorer. This printing feature does not work on a MAC Operating System.

6. Choose the print symbol highlighted in red to print the entire HCFA.

Please note this will print the entire HCFA so please **DO NOT** use pre-printed forms when printing. Instead, use plain blank paper and the system will print the HCFA and the information for you.

*IF YOU HAVE ANY QUESTIONS THAT THIS MANUAL DOES NOT ANSWER, FEEL FREE TO CALL US AT: (949) 464-9129 AND ONE OF OUR CUSTOMER SERVICE REPRESENTATIVES WILL ASSIST YOU.*