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ONLINE ENTRY TOOL INSTRUCTIONS

Go to www.officeally.com and click LOGIN on the orange bar across the top. Enter the User Name and Password you received upon setting up your account with Office Ally.

QUICK AND EASY INSTRUCTIONS FOR YOUR FIRST CLAIM

• Move your mouse over to Online Entry, and select HCFA Insert Claim or UB92 Insert Claim. The digital HCFA 1500 or UB92 form will appear.
• Type in the claim information
• Click on the UPDATE button in the bottom left corner of the page.

The Patient, Facility, Rendering Provider, Billing Provider will be stored for future use. You will not have to re-enter the information again!! You will then receive a message stating that your claim has been successfully batched.

USE YOUR STORED INFORMATION TO QUICKLY CREATE A CLAIM

• Move your mouse to Online Entry, select HCFA Insert Claim or UB92 Insert Claim.
• Click, “Load Stored Info”
• From the drop down menus, select the patient, provider, and facility. (If you’re billing for a new patient, don’t select any patient from the drop down menu.)
• Click, “Create New Claim”
• A claim will appear with the information you selected already filled in. Just fill in the remaining information and click, “Update.”
• You will receive a message saying your claim has been successfully created.

CHECKING YOUR CLAIM STATUS

CHECKING YOUR FILE SUMMARY – THIS STEP IS CRITICAL!

Within 24 hours, your file summary is ready. This report lists the status of all claims received by Office Ally. This acts as your receipt that your claims have been entered into our system.

• Log into Office Ally.
• Click, “Download File Summary”
• Click the pink-colored day on the calendar.
• Below the calendar, click, “View” and then click, “Open”

WE ARE HERE TO HELP YOU! CONTACT US AT 949.464.9129 ANYTIME FOR QUESTIONS OR CUSTOMER SUPPORT.

The following pages provide illustrated instructions, and instructions for inputting patient information in advance.
1. If you already have your information for your Patients, Billing Providers, Rendering Providers, and Facilities, you can quickly create a claim using that stored information.

2. Simply click on the down arrow and select your stored data from the list.

3. Click CREATE NEW CLAIM to load your selected stored data into a new claim.
4. The digital HCFA 1500 form will appear pre-filled with the stored information that you selected. After entering your claim, click on the UPDATE button in the bottom left corner of the page. You will then receive a message stating that your claim has been successfully batched. Processing takes 24 hours, and you can then view your claim status by viewing your File Summary.

PIN NUMBER UPDATE

The PIN number (Practice ID) is now input through field 24J. Also note that if using the stored info to fill in your data, the information will be pre-loaded into the correct fields. Please see figure below.

NDC CODE INPUT

The ndc code box on OLE is 11 char long. The ndc code itself is twelve digits, 10 numbers with two embedded hyphens. What is transmitted to the insurance companies is 11 digits long. The NDC code itself is in three groups of numbers separated by hyphens. The format is 4-4-2, 5-4-1, or 5-3-2 (1st group of four numbers, 2nd group of 4 numbers, and last group of 2 numbers in the case of the 4-4-2). The format that is sent to the insurances is 5-4-2 (or 11 digits instead of 12). If 4-4-2 format, enter with a leading zero. If 5-3-2 format, enter with an asterisk before the first digit of the second group (to pad for the 4 digit format of the 5-4-2). If 5-4-1 format, enter with an asterisk before the first digit of the third group (to pad for the 2 digit format of the 5-4-2).
<table>
<thead>
<tr>
<th>NDC Code</th>
<th>Format</th>
<th>Entered value on OLE ndc code box</th>
</tr>
</thead>
<tbody>
<tr>
<td>0517-5610-25</td>
<td>4-4-2</td>
<td>00517561025</td>
</tr>
<tr>
<td>10547-567-12</td>
<td>5-3-2</td>
<td>10547*56712</td>
</tr>
<tr>
<td>23578-5874-2</td>
<td>5-4-1</td>
<td>235785878*2</td>
</tr>
</tbody>
</table>
MANAGING CLAIM INFORMATION

YOU CAN STORE PATIENT, FACILITY, RENDERING PROVIDER, AND BILLING PROVIDER INFO WITHOUT ENTERING A CLAIM.

Once you are logged in, the left hand side lists your available services. With your mouse, hover over the Online Entry link and click on HCFA Manage Stored Info.

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

HCFA MANAGE STORED INFORMATION

NOTE: You can add a new patient simply by creating a new claim instead of using HCFA Manage Stored Info or UB92 Manage Stored Info. When a new claim is created, it automatically stored for future use.

1. Click on the ADD button to add a new patient to your database. You will be able to enter boxes 1-11 of the HCFA including the Payer information for the Patient. This data will be available for future claims. (Figure HCFA Stored Info 1)

2. Enter your patient data, and when you have finished click on the Update box. See Figure Below.

3. You will then return to the HCFA Manage Stored Information Screen. (Figure “HCFA Stored Info 1”)

ADDING A NEW BILLING PROVIDER

1. Simply click on ADD to add a new billing provider for your database.
2. Enter your billing provider info and click Update. See figure below.

**ADDING A RENDERING PROVIDER**

1. Click on ADD to add a new Rendering Provider.

2. Type in your Rendering Provider Information, and click Update. See Figure Below
**ADDING A NEW FACILITY**

1. Click ADD to add a new Facility.

2. Type in your Facility Information, and click Update. See Figure Below

![Add Facility](image)

**ADDING A NEW TEMPLATE**

1. Click ADD to add a new Template

![Template Information](image)

Note that the template information is based off of a “standard procedure” that you usually bill for on a continuing basis. However, the template section can be made to fit your needs. Please enter a template and use them as necessary.

2. In all cases, you would enter a template name so you can identify this template in the template drop down menu in stored menu.

3. Fill out the different codes and procedures that you want to appear on the form when choosing this template. For example, a chiropractor may call this template “Neck Adjustment” and will then proceed to enter the codes and charges associate with completing a “Neck Adjustment.”
4. Fill out everything up to box 27. For boxes 32 and 33, please leave those blank as they are pulled from the other sections within stored info. Once this is finished, choose “update.”

CREATING YOUR HCFA CLAIM FILE USING YOUR STORED DATA

1. If you already have your information for your Patients, Billing Providers, Rendering Providers, and Facilities, you can quickly create a claim using that stored information.
2. Simply click on the down arrow and select your stored data from the list.

3. Click CREATE NEW CLAIM to load your selected stored data into a new claim.

To create a new claim using your stored information, please select from each of the pertinent categories then click “Create New Claim”
4. The digital HCFA 1500 form will appear pre-filled with the stored information that you selected. After entering your claim, click on the UPDATE button in the bottom left corner of the page. You will then receive a message stating that your claim has been successfully batched. Processing takes 24 hours, and you can then view your claim status by viewing your Download File Summary.
CHECKING YOUR CLAIM(S) STATUS

CHECKING YOUR FILE SUMMARY – THIS STEP IS CRITICAL!

Within 24 hours, your file summary is ready. This report lists the status of all claims received by Office Ally. This acts as your receipt that your claims have been entered into our system.

- Log into Office Ally.
- Click, “Download File Summary”
- Click the pink-colored day on the calendar.
- Below the calendar, click, “View” and then click, “Open”

Please note: ANSI 837 users may receive an ERR Report in place of their file summary – you should contact Office Ally or your Vendor if you receive this report.

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