

ClaimRemedi / Pro-Filer BATCH ELIGIBILITY INTERFACE

The ClaimRemedi / Pro-Filer Eligibility Interface is intended to allow Pro-Filer customers to automatically generate a standard 'Eligibility Request' batch file out of their production system to send to a specific Payor for a predefined set of Clients and to import a standard 'Eligibility Response' file back in to Pro-Filer to update 'Eligibility Detail' records within a Client's existing (non-expired) Payor record.

The actual Eligibility status check is performed by ClaimRemedi through an automated FTP connection. ClaimRemedi also offers direct access to their Provider Portal in order to gather much more Client specific Eligibility information than is imported into Pro-Filer.

In order to implement this Eligibility Request/Response interface, a contract must be signed with ClaimRemedi for Eligibility record searches. (This vendor also has other HIPAA packages that may be helpful to your business office and/or billing department.)

When all of the set up and interface connections are established (as documented in this guide) the batch Eligibility Interface will automatically send batch Eligibility Request files (based on pre-defined parameters and schedules), read Eligibility Response files and update *effective* Client Payor records with new 'Eligibility Details' for response records that contain *valid eligibility information* (an Eligibility 'Status' and 'as of' date).

Grant, Cynthia, B - DOB: 6/20/1962 (48 Years Old) - ID: 197 / Medicaid - Medicaid - Standard FFS - 1 - Sp...

Payor Info | Identifiers | Episode Associations | Benefit Usage | Current Accumulation | Benefit Enrollment (834) | Client Population

Payor: Medicaid: 3030 Web Site

Ref. Payor:

Policy Holder:
 Self
 Family Member / Family Demographic: <No Selection>

Address: 2940 Rustic Road: Nokomis: FL: 01/01/2000 - <no Exp Date>

Eligibility ID:

ID No 1: 234567891 ID No 2:

Group / Plan: Medicaid - <no group ID> - Medicaid - <no plan ID> - Standard FFS

OR:
 Group: Medicaid Plan: Standard FFS
 Group ID: Plan ID:

Group Plan Address:
 PO Box 1630: Tallahassee: FL: 01/01/2003 - <no Exp Date>
 PO Box 1630;Tallahassee,FL

Verified Billable Benefits Assigned Rank: 1

Master Payor / Group / Plan
 Payor: Group / Plan:

Notes:

Dates:
 Effective: Sat Dec 01, 2007
 Expiration: Thu Aug 26, 2010
 Exp. Reason: <No Selection>

Eligibility Detail:		
Date	Type	Insert Date
04/01/2009	Eligible: 1	11/18/2009

Please note that the batch Eligibility Request and Eligibility Response files that are generated within this process are not 270 or 271 HIPAA formatted files. UNI/CARE and ClaimRemedi have developed request and response files, for the Pro-Filer interface functionality, that contain only the information needed to ascertain the Client's Payor Eligibility as 'Eligible', 'Not Eligible' or verify the Client has a current 'Spend Down' responsibility. If additional eligibility information is needed, use ClaimRemedi's Provider Portal to access additional Client specific information and to launch on-line, real time inquiries. (See next section for additional information.)

CLAIMREMEDI SET UP REQUIREMENTS

1) Contact ClaimRemedi to provide customer access to their Eligibility Portal for set-up of customer profile (including Payors), to access Eligibility information directly from the ClaimRemedi portal and:

- to allow interface of batch Eligibility Request files (from Pro-Filer),
- through the ClaimRemedi portal,
- to the designated Payor,
- collection of response information
- back through ClaimRemedi
- to generate an Eligibility Response file and import of this file back in to Pro-Filer.



-----**Provider Portal Information**-----

The ClaimRemedi portal address is: <https://my.providersportal.com>

ClaimRemedi will supply:

- Admin Username
- Admin Password

Used for manual access of the site in order to make set-up changes & run reports.

ClaimRemedi will also supply:

- Username
- Password

Used for manual access, but also used for auto-upload of Eligibility request files.

(See later in “Pro-Filer Table Set-Up Requirements” section regarding Maintenance / System / System Data form / Interfaces tab)

2) Set up an FTP engine compatible with ClaimRemedi’s FTP process.

-----**FTP Connection Information**-----

URL: sftp.providersportal.net

UserName & Password: same as Provider Portal (Not Admin)

Server Type: FTP/SSL (Auth SSL)

Remote Port: 22

Folders you will see:

- inbound – Upload your batch Eligibility Request file to here. They will remain here until they are processed. (This is performed automatically by the Pro-Filer Eligibility Interface functionality.)
- outbound – You will manually download your new batch Eligibility Response files from here. Once downloaded, they are also moved to the outbound_Archive folder.
- outbound_Archive – You may download old Eligibility Response files from here. Any response files with duplicate names will be slightly altered to avoid being overridden.

Note: Pro-Filer has an embedded, royalty free, delivered FTP engine that allows Automation Manager to “automatically” FTP eligibility files to ClaimRemedi’s FTP site.

However, you will need to have an FTP tool that will allow you to “manually” bring back batch Eligibility Response files as they become available in the ClaimRemedi FTP ‘outbound’ folder.

ClaimRemedi supports a FTP SSL file transfer, if you already have a compatible tool, you can use it with the credentials provided to you by ClaimRemedi to access the FTP/SSL download area.

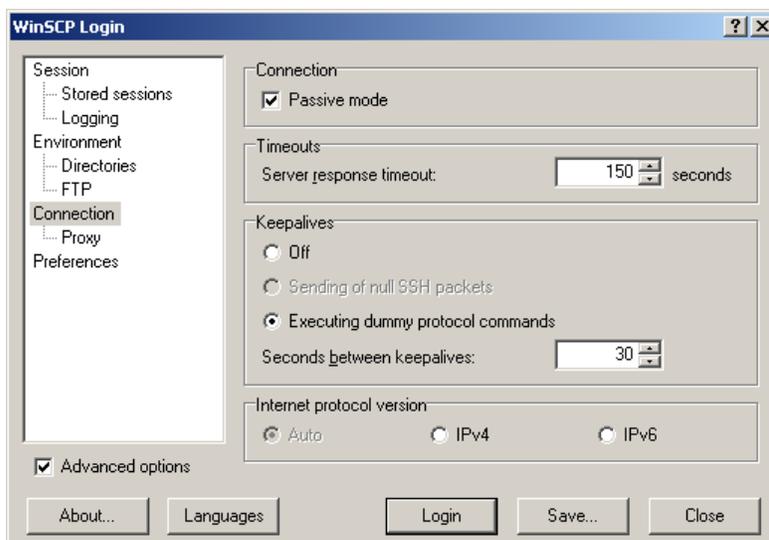
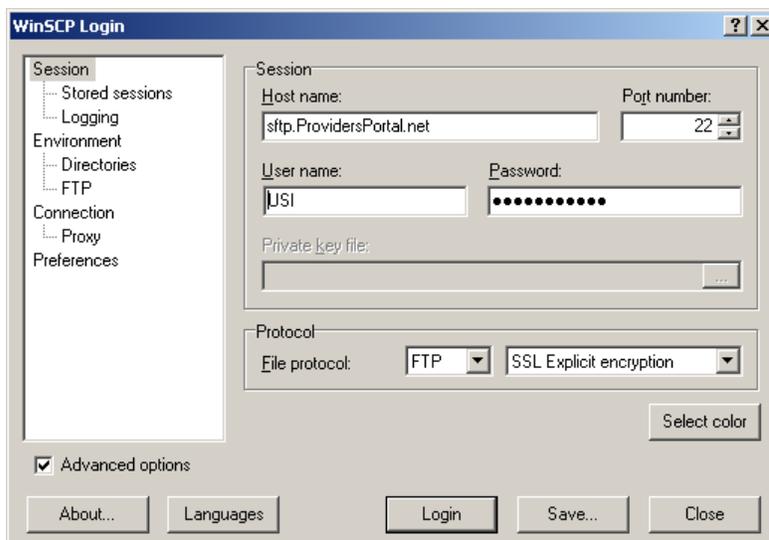
-----Free FTP Tool Information-----

If you do NOT already have a compatible FTP tool, UNI/CARE has confirmed that a free WinSCP tool is compatible with the ClaimRemedi FTP configuration.

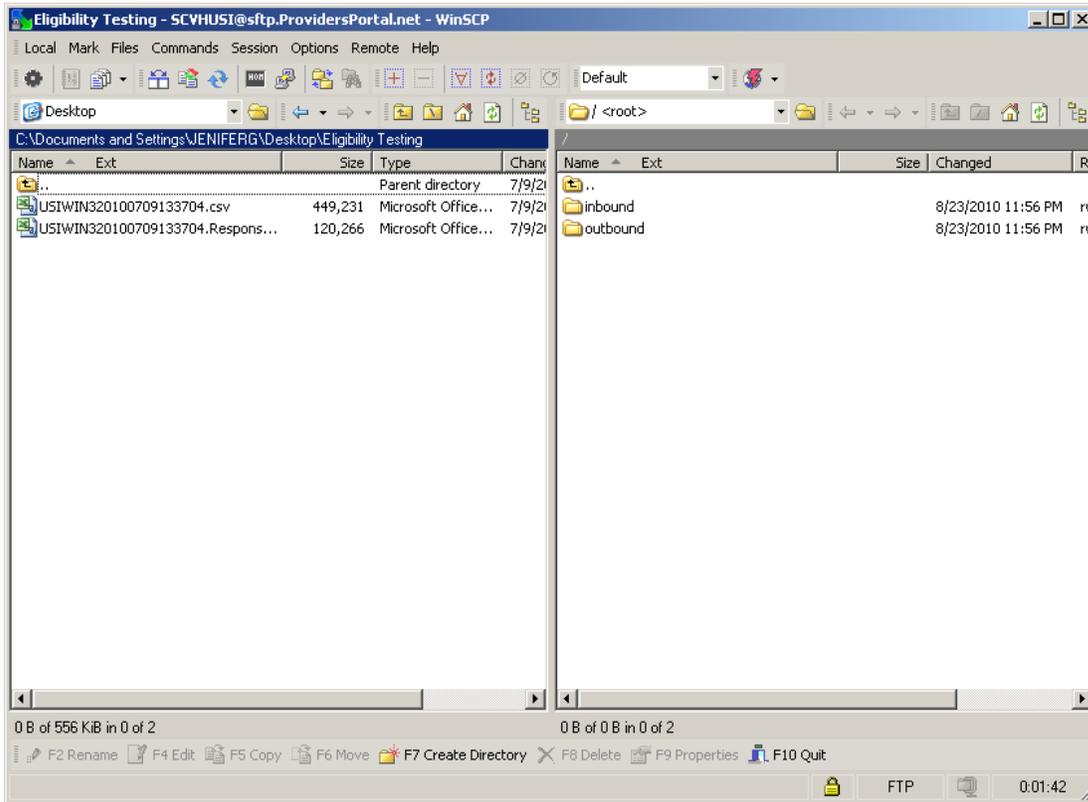
Here is the link to the WinSCP tool FTP client available for use: <http://winscp.net>

The WinSCP tool must be set up, including modifications from its default settings, in order for it to work with ClaimRemedi's FTP configuration.

The screen prints shown below document these required modifications. (The Username and Password here are the same as those provided to you by ClaimRemedi for their Provider Portal access – NOT Admin.)

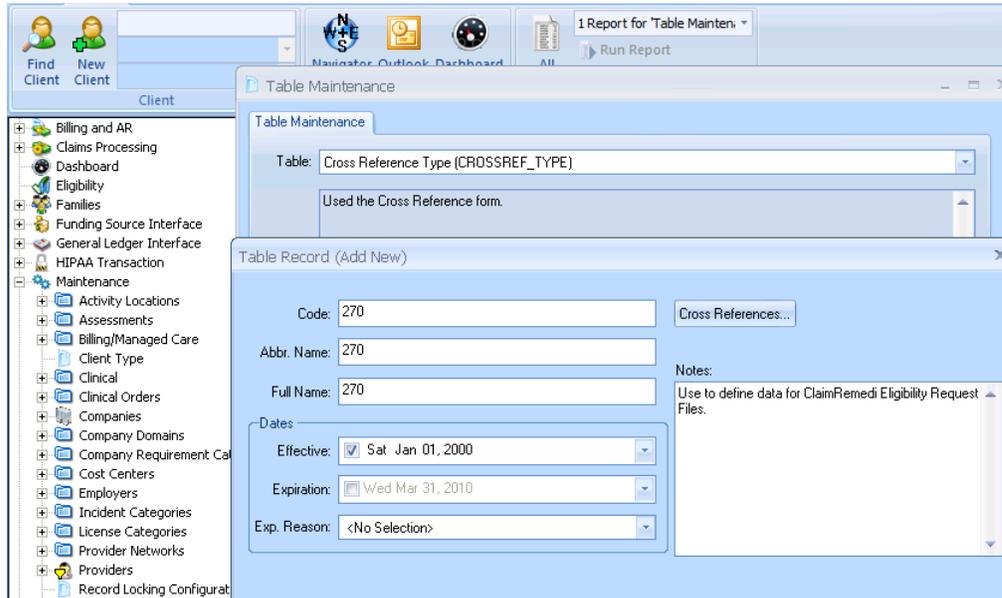


Once logged on, the WinSCP FTP tool, it will look something like this:

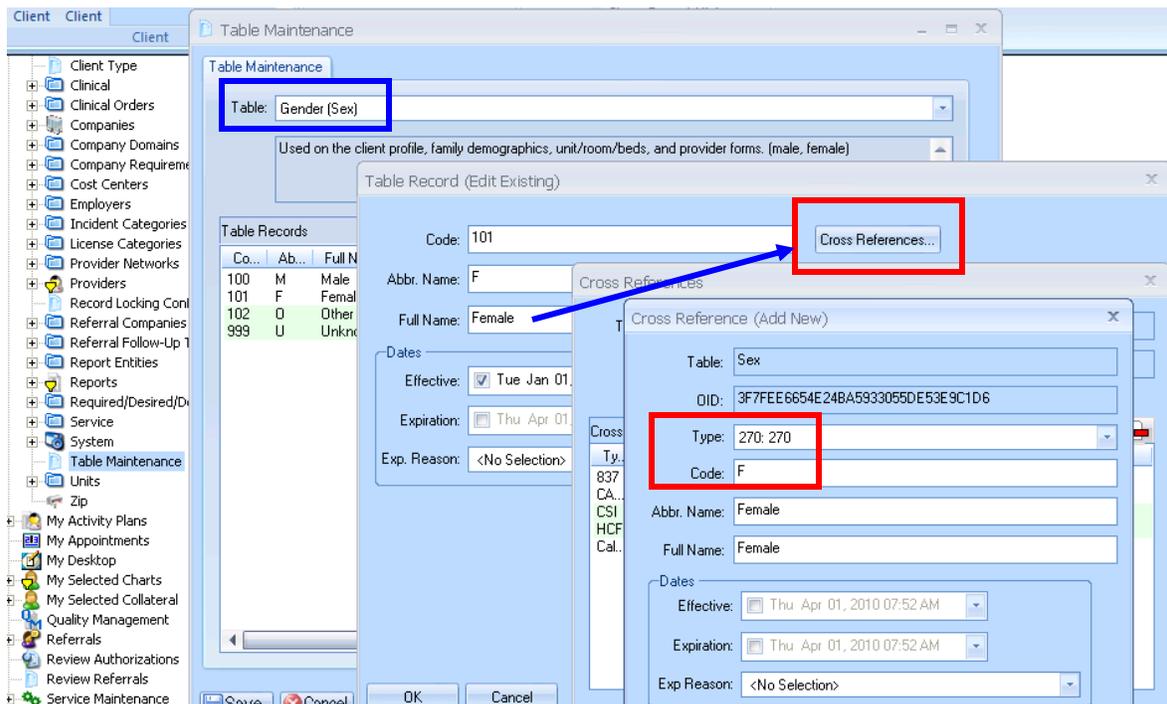


PRO-FILER TABLE SET UP

1) In Table Maintenance, create a **“270” Cross Reference** record as illustrated below:



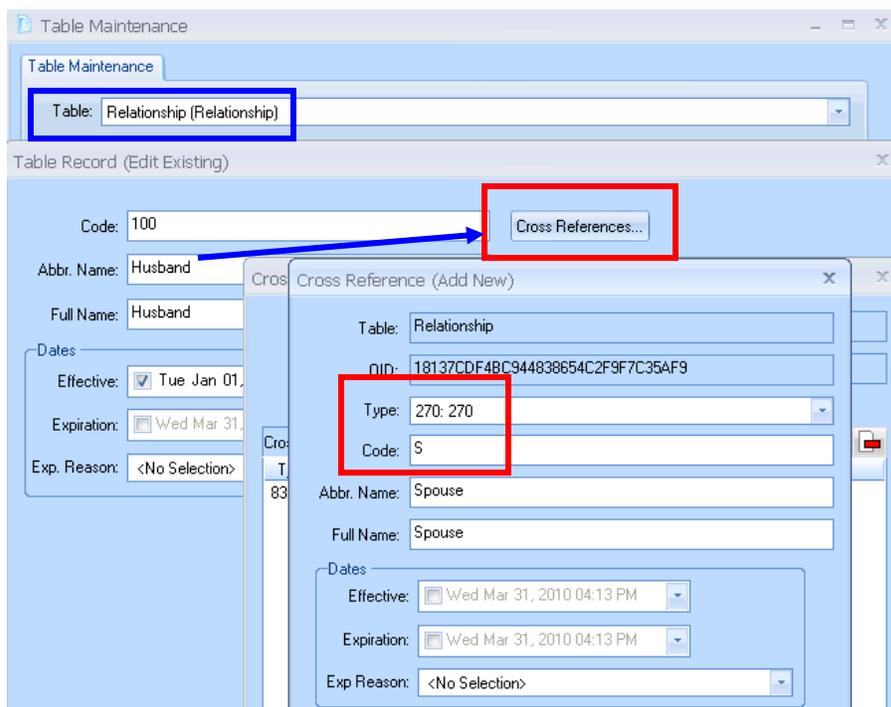
2) In Table Maintenance, create a **“270” Cross Reference** on each **“Gender”** record, to report the Client or Insured’s gender, as illustrated below:



Allowed values are “F” (Female), “M” (Male) and “U” (Unknown).

The Eligibility Request file uses the **Code** field of this Cross Reference record.

3) In Table Maintenance, create a “270” Cross Reference on each “**Relationship**” record, to report the *relationship of the Client to the Insured* (if other than Self), as illustrated below:



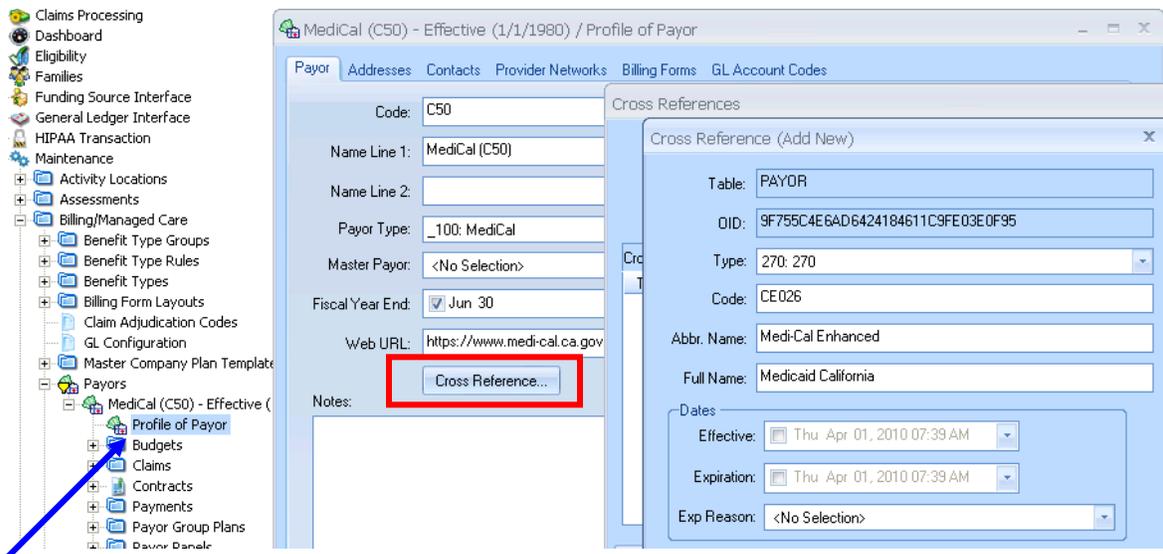
Allowed values are “S” (Spouse), “C” (Child) and “O” (Other).

The Eligibility Request file uses the **Code** field of this Cross Reference record.

Note: Because this is the relationship of *‘the client to the insured’* and Pro-Filer actually stores the relationship of *‘the insured to the client’*, **build the “C” value on all ‘Parent’ type Relationship records** (i.e. – Parent, Mother, Father, Step Parent, Foster Parent, etc.) NOT on any ‘Child’ relationship type records that may exist.

Note: “270” Cross References should only be set up on relationships that are potentially *‘the subscriber’ entity for a Client* (Examples: Spouse, Parent, Guardian, etc.). All other ‘relationships’ (Examples: Attorney, Clergy, etc.) do NOT need a “270” Cross Reference built.

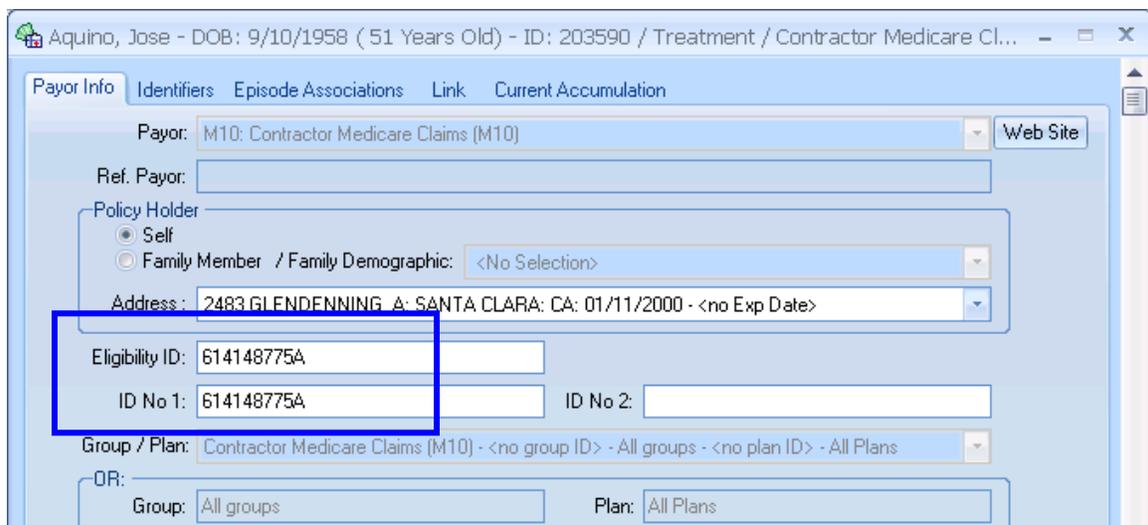
4) In Table Maintenance, create a “270” Cross Reference on each “**Payor**” record, to report the **ClaimRemedi Payer Name & Payor ID** as illustrated below:
(See “ClaimRemedi_Complete_Payers_List.pdf” for specific names and codes.)



The Eligibility Request file uses the **Code** and **Full Name** fields of this Cross Reference record.

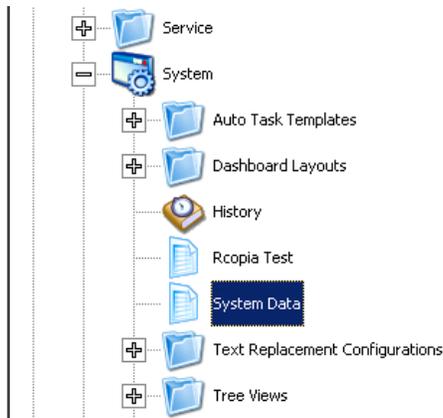
Note: The Pro-Fler Payor “270” Cross References need only be set up on Payors that will potentially be submitted to ClaimRemedi for Eligibility information.

5) Run the ‘Copy ID1 to Eligibility ID for Payor X’ script, if the value stored in the Client’s Payor records in the ID1 field is also the value that should be submitted to check Eligibility information for this Payor. This script will copy the value currently stored in the Client Payor “ID1” field into the “Eligibility ID” field for submission in the Eligibility Request file.



Important Note: if the value stored in the Client’s Payor records in the ID1 field is NOT the value that should be submitted to check Eligibility information for this Payor, these “Eligibility ID” values will need to be entered manually.

6) In the Maintenance/System/System Data form, go to the “Interfaces” tab:



A screenshot of the 'System Data' form, specifically the 'Interfaces' tab. The form is divided into several sections:

- Eligibility Request Connection Information:** Contains four text input fields: 'Login' (with the value 'SCVHUSI@sftp.ProvidersPortal.net'), 'Password' (with masked characters 'xxxxxxxx'), 'Upload Online Directory' (with the value '/inbound'), and 'Upload Batch Directory' (with the value '/inbound').
- Eligibility Response:** Contains a checked 'Enable' checkbox and an 'Import frequency in minutes' field with the value '5'. Below this is a table for 'Eligibility File Locations' with columns 'Input Directory' and 'Work Directory'. The table contains one row with the paths 'I:\Temp\JeniferG_Eligibility Testing\Input Directory' and 'I:\Temp\JeniferG_Eligibility Testing\Work Directory'.
- Eligibility Import:** Contains a checked 'Enable' checkbox and an 'Import frequency in minutes' field with the value '5'.

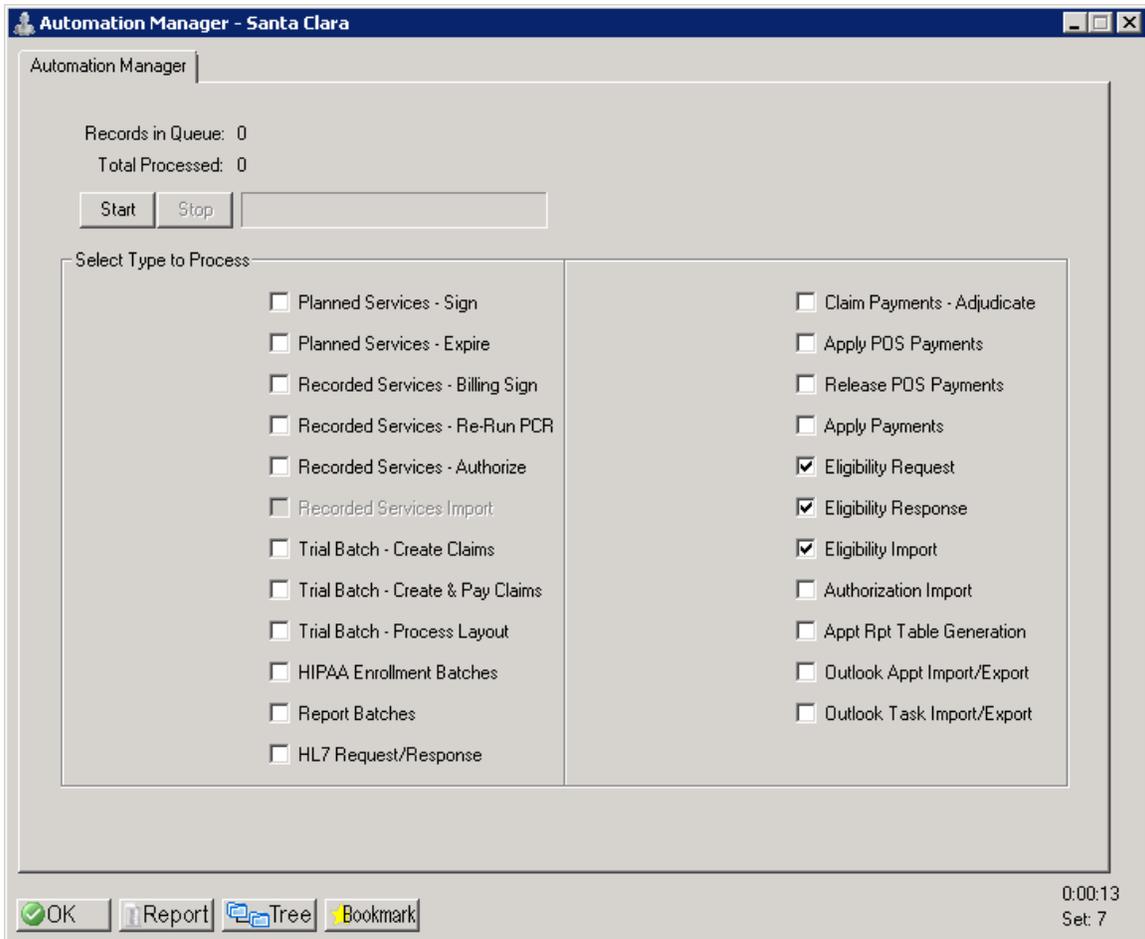
7) In the “Eligibility Request Connection Information” section of this form:

- Enter the “Login” address provided to you by ClaimRemedi (standard Username – NOT Admin Username – plus “@sftp.ProviderPortal.net”)
- Enter the “Password” provided to you by ClaimRemedi (NOT Admin Password)
- In the “Upload Online Directory” field enter “/inbound”
- In the “Upload Batch Directory” field enter “/inbound”

8) In the “Eligibility Response” section of this form:

- Check the “Enable” checkbox

- Define how often (in minutes) Automation Manager should interrogate your network “Input Directory” for new Eligibility Response files
- 9) In the “Eligibility File Locations” section of this form:
- Define the Network Path where you will manually place Eligibility Response files collected from the ClaimRemedi FTP location
 - Define the Network Path to where the system will automatically move Eligibility Response files as they are processed by Automation Manager
- 10) In the “Eligibility Import” section of this form:
- Check the “Enable” checkbox
 - Define how often (in minutes) Automation Manager should import Eligibility information from files found in your network “Input Directory”
- 11) Save all of the information entered into the Interfaces tab of the System Data form.
- 12) Once all of the ClaimRemedi, FTP and Pro-Filer set up requirements are met, turn on the following Automation Manager processes:



- Eligibility Request - Sends the batch Eligibility Request records, that are put into the AM queue by SQL scripts, to ClaimRemedi's FTP site
- Eligibility Response – Parses the batch Eligibility Response file received from ClaimRemedi into Pro-Filer tables
- Eligibility Import – Imports the Client Eligibility records (into the Client Payor Eligibility Details) based on the information contained in the parsed Eligibility Response file

Note: the Pro-Filer tables that Automation Manager uses, which are hosting the request and import, are called:

- Eligibility_Request
- Eligibility_Import
- By linking the Eligibility Request table to the Eligibility Import table, users can ascertain the status of their Eligibility requests as either
 - 0=Not Eligible
 - 1= Eligible
 - 2 = Spend Down

13) With UNI/CARE assistance, determine which of the following imbedded Pro-Filer SQL scripts (stored procedures) you will schedule to run to automatically create and send the desired batch Eligibility Request files:

- Uni_Eligibility_ByClient
- Uni_Eligibility_ByClientAndPayor
- Uni_Eligibility_ByClientPayor

These stored procedures allow the system to determine which Client records to send to which Payors. Please enter a Logit requesting assistance in reviewing the file options and setting up the scheduled Eligibility Request file process.