



INTRODUCTION TO OFFICE ALLY

Provider Reference Packet

TABLE OF CONTENTS

PRODUCT INFORMATION 3

CONTACT US4

QUICK REFERENCE GUIDE.....5

ISA AND GS INFORMATION6

ONLINE CLAIM ENTRY 7

FILE SUMMARY AND EDI STATUS REPORTS 8-10

CLAIM FIX 11-12

INVENTORY REPORTING 13-14

Office Ally

A full-service clearinghouse, offering a web-based service to providers for **FREE**.

Our clearinghouse services are easy to use and since they are web based, you can access it from anywhere, anytime! Just a few clicks of the mouse and your claims are in Office Ally's capable hands.

Submit to all payers

No contracts to sign

Free set-up & training

Use your existing Practice Management Software

Order labs/receive results online

24/7 Customer Support

Free Online Claim Entry - No software to purchase

Correct claims online

Detailed summary reports

Practice Mate - FREE Practice Management system

Electronic prescribing available

EHR 24/7 - Electronic Health Records..

'\$39.95 per month/provider



Submit claims in any format

HIPAA compliant transmission of CMS-1500, UB-04, & ADA formats

ICD-9, ICD-10, & modifier code look-up

Online claim history

Also available for certain payers/states:
Submit Medicare, Railroad Medicare, Tricare/Oiampus, Medicaid, & Workers' Compensation claims

Real-Time eligibility 270/271

Real-Time claim status 276/277

Online patient eligibility checking

Electronic remittance advice
4 ERA (EOB) 835

CONTACT INFO 6 SUPPORT OPTIONS

Business Hours: Monday thru Friday 5:00am PST to 9:00pm PST
Saturday and Sunday 6:00am PST to 5:00pm PST

Email: info@officeally.com or support@officeally.com

Customer Service:	(360) 975-7000	Option 1
Technical Support:	(360) 975-7000	Option 2
Enrollments:	(360) 975-7000	Option 3
Accounting:	(360) 975-7000	Option 4
Scheduling (FREE Training Appointments):	(360) 975-7000	Option 5

General Fax Number:	(360) 896-2151
Enrollments Fax Number:	(360) 314-2184

Live Chat Available (6am - 5pm PST): Click [HERE](#) or enter <https://support.officeally.com/> into your browser to access Live Chat, Claim Rejection Solutions, Troubleshooter, News and more!

For additional resources, please click on the link(s) below:

- [Office Ally Forms & Manuals](#)
- [Full Payer List \(click here\)](#)
- [EDI Enrollment Forms/Instructions \(click here\)](#)
- [ERA Enrollment Forms/Instructions \(click here\)](#)
- [FAQs \(click here\)](#)

Not an Office Ally user?
ENROLL NOW

BASIC UPLOAD INSTRUCTIONS

1. Log into www.officeally.com
2. **Hover over** "Upload Claims"
3. **Click** "Upload HCFA"
4. **Click** "Select File"
5. Browse for your file and **click** "Open"
6. **Click** "Upload"
7. You will receive an upload confirmation page with your File ID number.

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. If you submit via SFTP, we can also activate Office Ally 999/277 reports (from Office Ally - NOT the payer). Review your File Summary reports to ensure that all the claims you are sending are processing correctly as well as keep track of rejected claims you need to resubmit for processing.

1. Log into Office Ally
2. **Click** "Download File Summary"
3. **Click** the pink-colored day on the calendar
4. Below the calendar, **click** "View" and then **click** "Open"

OTHER FEATURES AVAILABLE

- **Claim Fix** - Fix your rejected claims here! Your rejected claims are listed by date; click on a rejected claim, make any necessary updates, and click "Update." We will automatically reprocess your updated claims that night.
- **Inventory Reporting** - Search for claims using a variety of options including date-uploaded, patient name, insurance company, or tax ID.
- **View Claim History** - See claim status and EDI responses for a whole File ID or a specific claim
- **Patient Look-Up** - Check patient eligibility for IPAs
- **Code Search** - Check the validity of ICD-9 and ICD-10 codes, place of service codes, and modifiers

WHAT INSURANCE COMPANIES CAN I SEND TO?

By signing up with Office Ally, you are automatically enrolled to send claims to 95% of our payers. However, a small number of payers require you to pre-enroll before we can send your claims electronically. You can confirm which payers require pre-enrollment by looking at the ENR (Pre-Enrollment Required) column on our payer list. Listings with "Y" mean that they will require pre-enrollment. EDI enrollment forms are available in the Resource Center under "Payer Enrollment Forms".

CONNECT VIA SFTP

If you have the capability to transmit files via SFTP and prefer to submit that way, please contact Customer Service at 360- 975-7000 Option 1 and request that one be set up. They will ask for the following information, so you will want to have this ready: Office Ally Username, Contact Name, Email, Software Name, Format Type being submitted, Will you want 999/277's activated (OA responses, NOT the payers)

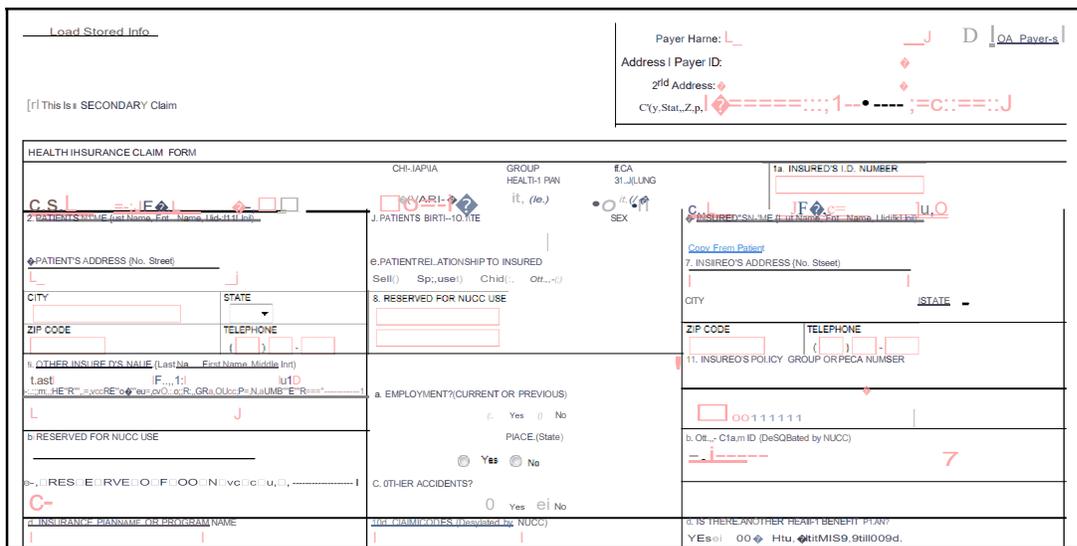
This section describes Office Ally's use of the interchange (ISA) and functional group (GS) control segments. Note that submissions to Office Ally are limited to one interchange (ISA) and one functional group (GS) per file. Files may contain up to 5000 transaction sets (ST).

837 INBOUND TRANSACTION

X12 Data Element	Description	Values Used	Comments
ISA01	Authorization Qualifier	NA	NA
ISA02	Authorization Code	NA	NA
ISA03	Security Qualifier	NA	NA
ISA04	Security Information	NA	NA
ISA05	Sender Qualifier	30 or ZZ	30 or ZZ
ISA06	Sender ID	Trading Partner's Sender ID	Tax ID is preferred
ISA07	Receiver Qualifier	30 or ZZ	30 or ZZ
ISA08	Receiver ID	330897513	Office Ally Tax ID
ISAI (4010)	Interchange Control Standards ID	"LJ"	
ISAI (5010)	Repetition Separator	"A" or !:J0Ur repetition separator	
ISA12	Interchange Control Version Num	00401 for 4010, 00501 for 5010	
ISA15	Usage Indicator	p	Production File For testing, send "OATEST" in the filename.
GS01	Functional Id Code	Indicates transaction type	See HIPAA IG
GS02	Sender's Code	Trading Partner's Sender Code	No Suggestions
GS03	Receiver's Code	OA	Office Ally Business Units identified for translator routing purposes.
GS08	Version Release Industry ID Code	Identifies the transaction in ASC Terms	See HIPAA IG

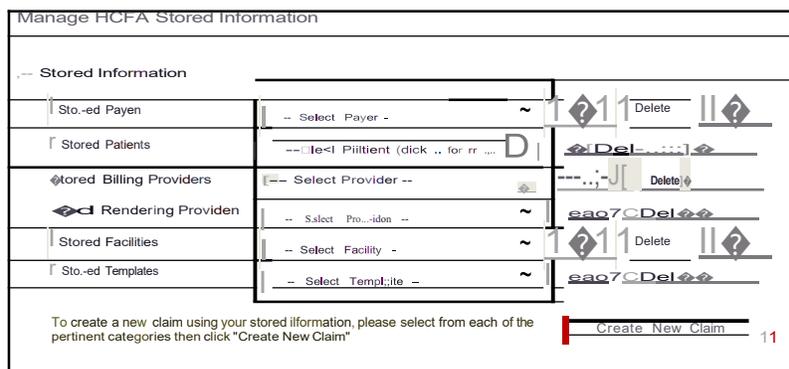
If you don't have a software program to create claim files, we have other options available for you. This includes manual entry (see below) and Practice Mate (our own online based practice management system - contact our Enrollments department for more information on Practice Mate). Training Videos on many of our products can be found by clicking [here](#) or visiting <https://cms.officeally.com/training>.

1. Once logged in to Office Ally, hover over **Online Claim Entry** & select the format type you want to work with.
2. Our **Online Claim Entry** forms are copies of the paper version, but we also offer additional fields for the information you normally can't put on the paper version. You can find this under **Additional Fields**.
3. Click on **Update** when you're ready to submit the claim.



The image shows a screenshot of the HCFA insurance claim form. At the top, there is a 'Load Stored Info.' button and a 'Payer Name' field with a dropdown menu. Below this is a checkbox for 'This is a SECONDARY Claim'. The form is divided into several sections: 'PATIENT'S ADDRESS', 'PATIENT'S BIRTH DATE', 'PATIENT RELATIONSHIP TO INSURED', 'INSURED'S I.D. NUMBER', 'INSURED'S ADDRESS', 'INSURED'S POLICY GROUP OR PECA NUMBER', and 'EMPLOYMENT'. Each section contains various input fields for text, dates, and numbers. There are also checkboxes for 'RESERVED FOR NUCC USE' and 'OTHER ACCIDENTS?'. The form is filled with red text and symbols, indicating it is a sample or test form.

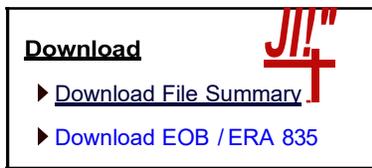
4. Use **Managed Stored Information** to store payer, provider, patient, and facility information to save you time the next time you submit. You can also create templates!



The image shows a screenshot of the 'Manage HCFA Stored Information' interface. It features a table with columns for 'Stored Information', 'Select Payer', 'Select Patient', 'Select Provider', 'Select Facility', and 'Select Template'. Each row has a 'Delete' button and a 'Create New Claim' button. Below the table, there is a note: 'To create a new claim using your stored information, please select from each of the pertinent categories then click "Create New Claim"'. The interface is designed to allow users to manage and reuse information for future claims.

Once Office Ally has processed your claims, you receive an email notification your File Summary is ready. Follow the steps below to view your File Summary. If you are set up with an SFTP account, you can receive the File Summary reports as 277CA's (call Customer Service at 360-975-7000 to have this activated). After a payer has processed your claims, some send back a confirmation or error message depending on whether the claim passed or failed their processing. Any payer response file we receive from the payers is passed on to you in the form of an EDI Status Report. Please note NOT all payers return responses.

1. When you are logged in to the Office Ally website, click on the **Download File Summary** link on the left-hand side.



2. A calendar will appear on your screen. The **YELLOW** Active Date is today's date. Dates in **BLUE** indicate reports you have already viewed. **PINK** dates indicate there are reports that you have not viewed yet.

0) Downloads pending in prior month

<< November 2006 >>							Calendar Legend
S	M	T	W	Th	F	S	Active Date
			1	2	3	4	PJ Report(s) To Be Viewed
5	6	7	8	9	10	11	PJ Report(s) Viewed
12	13	14	15	16	17	18	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 the page 'Download EOB / ERA 835'.
19	20	21	22	23	24	25	
26	27	28	29	30			

3. When you click on **BLUE** or **PINK** dates on the calendar, reports available for that day will be listed.
4. In the **File Name** column, you'll see that File Summaries are sent back with your original file name included. EDI Status Reports come back formatted as: **OAFIELD_IDI_STATUS_YYYYMMDD.txt**.
5. In the **Download/View** column, you can click the **VIEW** link to download and view the file.

Payer	Form Type	File ID	File Name	#Accepted	#Pending	#Failed	Total	Download/View
MULTI	HCFA			93	0	7	100	VIEW
MULTI	HCFA			190	0	10	200	VIEW
MULTI	HCFA			5	0	1	6	VIEW
MULTI	HCFA			385	0	15	400	VIEW

Payer	Form Type	File ID	File Name	#Accepted	#Pending	#Failed	Total	Download/View
MULTI	PayerResponse		_EDI_STATUS_20061107.txt	8436			331187671	VIEW

6. Click on Open to view the claim detail in the file. You can also print this detail if needed.

7. The File Summary will appear and look similar to below:

```

Dear John Smith

Four claims file hasnm* been processed by Office Ally, claims that are accepted belm* have been forwarded to the appropriate payers
+or final processing. Processing results for your claim file are as follmvs.,

=====
hefile j33333333_03112013 -,as srl:it into 3 files
or processing. These files are:

File ID                Payer (PayerID)                Claims    Totals
1333141444            O!AIIPUS (CIH002) (OI002)                $900.00
133314455            Medicare Florida (MR025)                $390.00
133314466            BCBS of Florida (00590)                $770.00
Total: $2,060.00
=====

Multiple Payer Upload File Summary

File Name:133333333 0311.2013
Date Uploaded: 3/11/2013
Type of File: HCFA
Date Processed: 3/11/2013
3 # of Claims Initially Accepted
3 # of Claims Rejected
+---> 3 # errors FE131 - Invalid Diagnosis Code

-----ERROR CLAIM DETAIL
CLAIM# 0A CLAIMID PATIENT ID      LAST,FIRST      DOB      FR0-1 OOS  TO OOS  CPT  ICD9  TAX ID  ACCNT#  PHYS.ID  PAYER  ERRORS
1)  677777753  123456789A      DUCK OONALD    01/01/1955  02/07/2013  02/07/2013  99215  78791  222334444  DUCK1.234  111111111  MR025  FE131
2)  677777754  ABC123456789    DOE #P/        07/04/1965  02/07/2013  02/07/2013  99216  78906  333115555  OOEAO0000  111111111  00590  FE131
3)  677777755  0098765432      DISNEY WALTER  1.2/25/1936  02/07/2013  02/07/2013  99215  56400  959999999  DISN@L0    111111111  MR025  FE131

-----ACCEPTED CLAIM DETAIL
CLAIM# 0A CLAIMID PATIENT ID      LAST,FIRST      DOB      FR0-1 OOS  TO OOS  CPT  ICD9  TAX ID  ACCNT#  PHYS.ID  PAYER
4)  677777756  401649008      \WHITE SNC)\1  1.2/31/1948  02/07/2013  02/07/2013  88305  7871  333115555  \WHITS000  111111111  CH002
5)  677777757  401649008      RABBIT JESSICA  1.2/31/1948  02/10/2013  02/10/2013  88305  7871  333115555  RABJ0000  111111111  CH002
6)  677777758  401649008      CHARMHJG PRINCE  1.2/31/1948  02/15/2013  02/15/2013  88305  7871  333115555  CHARP000  111111111  CH002
    
```

POSSIBLE STATUSES IN FILE SUMMARY

INITIALLY ACCEPTED: These are claims that have passed Office Ally's edits and will be sent on to the Payer(s).

PENDING: Rejected for "Patient Not Covered" or "Patient Not Found"; we will hold on to these claims and reprocess every 7 days for 3 attempts (21 days) in case it's just a matter of the eligibility file not being up to date. If not found by the 3rd attempt, it will be rejected back to you.

REJECTED: Specific reasons will be noted on the report. Note the error code column on the right side of the Error Claim Detail section. These codes are explained above the Error Claim Detail section.

8. The EDI Status Report will appear and look similar to below:

Dear: Smith, Jdh n [use name]

Electroic Olaim Submission Payer Responses Pr[]fided Sy Office Ally

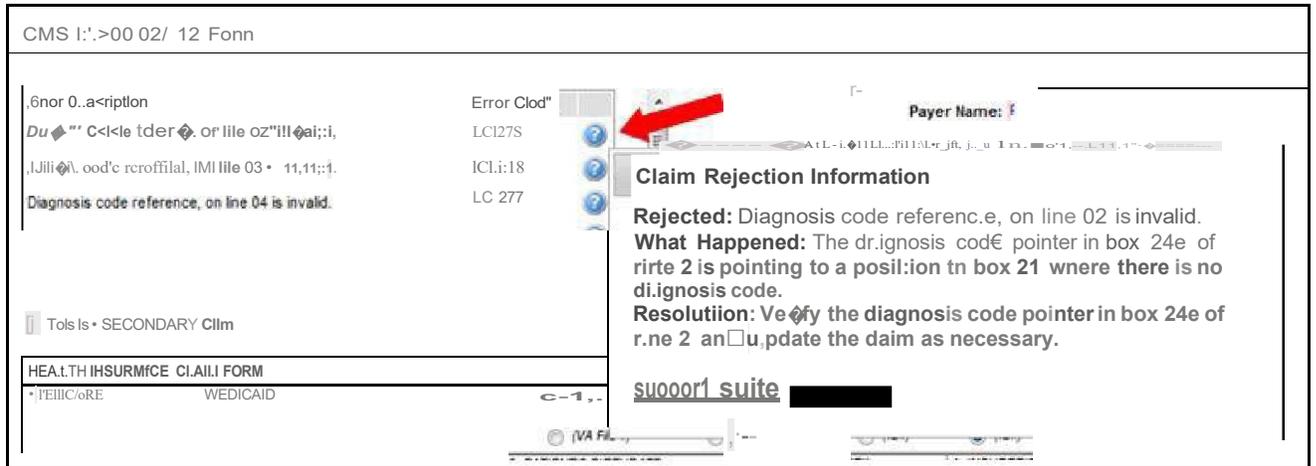
The following list of claims are the most current responses from their corresponding payers, please review the results of each claim and determine if further action is required for the claim. Should any claim be rejected please fix the error and resubmit the claim to Office Ally.

Payer ID	Payer	fl Accepted	\$ Accepted	fl Pending	\$ Pending	# Rejected	\$ Rejected
[MR002 I	Medicare CA-South	2	\$4,649.50	0	\$0.00	7	510,115.00
[6BO. I]	CIG "A Healthcare	7	\$14,980.00	0	\$0.00	0	\$0.00
[IP079 I	N-A-M-M So Cal	5	57,480.00	0	50.00	0	50.00

File ID	Claim ID	Pat. Acct#	Patient	Amount	Practice ID	Tax ID	Payer	Payer Pr: m,ssDt	Payer Ref ID	Status	Payer Response
545737@9	375511140.1	68-8:888	Last, First	\$-1,133.50	11345a57WD	9876.543-.21	MI100.2	07/1A/1010			RE EICTEID Sliballriber Zip
545737@9	3755111470	686868	Last, First	\$1,062.50	11345a57WD	9876.543-.21	MI100.2	07/1A/1010			RE EICTEID Inva : S:ru>crib.c:riID
54573w;	375-591463	668868	Last, First	\$-1,317.50	11345a57WD	9876.543-.21	MJ1002	07/1A/1010			REJECTED Invalid Surucrisr ID
54. ;73769	375E91400	668868	Last, First	\$-1,670.00	11345a57WD	9876.543-.21	MJ1002	07/1A/1010			ACOEIPTEID Acepte<- No Additional DETaili
545737&9	375591401	686868	Last, First	\$2,770.50	11345a57WD	9876.543-.21	MJ1002	07/1A/1010			ACOEIPTEID Acepte<- No Additional DETaili
5544!(,0	376878019	686868	Last, First	\$-B.50.00	12.34.567691	9876.543-.21	62308	07/14/1010			ACOEIPTEID e1a hasb=Bnac ooforproes,;" bythepayer.
55448070	3768780.20	686868	Last, First	\$1,870.00	11345a57WD	9876.543-.21	623C8	07/14/1010			ACOEIPTEID Jclaim has b.cai acOEWed forprooeE&n.gby thep,irer.

9. The EDI Status Report will list any messages Office Ally has received from the payer on whichever day it appears. Most come back within 2-5 business days, but every payer is different.

Make sure to check for your reports daily as it is your responsibility to correct and resubmit any claims that reject. You can correct the claims within your practice management system and resubmit; or via our online Claim Fix tool.



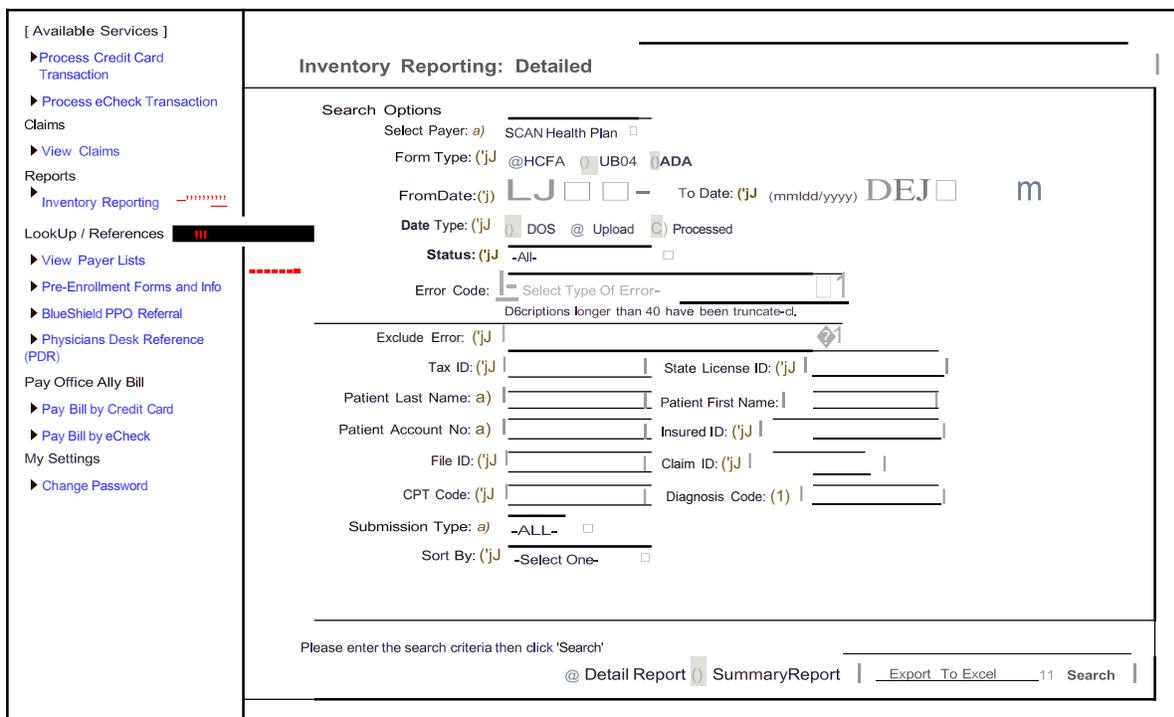
- Once you've made your corrections/adjustments, click on the **Update** button at the bottom left corner of the claim image.

CUA: [_____]	[_____]
Accident Date: [L J, [1r- 1]	[_____]
Mammography Certificate: [_____]	a. NPI: [ICC__]
<input type="button" value="Update"/>	

- Claims you have updated via this tool will be listed under Claim Fix: Claims Awaiting Batch until they are picked up by Office Ally. These claims are AUTOMATICALLY picked up by Office Ally every few hours. Once they are picked up by Office Ally, they will no longer be listed in Claim Fix: Claims Awaiting Batch. You will receive a new File Summary Report for the claims that you updated. Please note that the resubmissions are assigned new Office Ally Claim ID numbers.

Within the Inventory Reporting section, you can view all of the claims you sent to Office Ally, whether they have passed or rejected. Inventory Reporting will list the Office Ally Claim/File ID assigned to each claim as well as the Payer ID the claim was sent to, OA's Receive Date, Patients First/Last Name, Patient Acct Number, From/To DOS, Tax ID (Master Vendor), Insured ID, and Total Charges. You are able to click on the Claim ID (blue link) and pull up the claim image. From here you can click on "Print to PDF File" to print that claim image.

1. When logged into Office Ally, click on the **Inventory Reporting** link on the left-hand side. The **Inventory Reporting** screen will look as follows:



2. There are many options for you to narrow down the results that pull up. NOT every field is required to be filled in. The date range will always need to be selected. The dates automatically default to the last 60 days. You can look back years if needed, but the date range cannot be more than 60 days at a time.

- If you do not change any of the default information and just click **Search**, all claims submitted within the past 60 days will be returned in the results.
Please note: PHI has been removed.

Please enter the search criteria then click Search

@Detail Report | Summary Report | [Export To Excel](#) | [Search](#)

Search Results - 226 claims found

Status	File ID	Claim ID	Payer ID	Received Date	Patient Name (Last, First)	Patient Account No.	From DOS	To DOS	Total Charge	Print	Error Code(s)
Passed	138459544	697240806		4/28/2013			14/15/2013	14/15/2013	5225.00		ACCEPT
Passed	138465318	697267729		4/28/2013			14/1/2013	14/22/2013	\$34.00		ACCEPT
Passed	138465318	697267733		4/28/2013			14/1/2013	14/22/2013	5198.00		ACCEPT
Passed	138465318	697267732		4/29/2013			14/2/2013	14/26/2013	\$320.00		ACCEPT
Passed	138465318	697267731		4/28/2013			14/11/2013	14/18/2013	\$594.00		ACCEPT
Passed	138465318	697267730		4/28/2013			14/11/2013	14/18/2013	\$931.00		ACCEPT
Passed	138479103	697305906		4/29/2013			14/1/2013	14/23/2013	5169.00		ACCEPT
Passed	138479103	697305904		4/29/2013			14/25/2013	14/25/2013	\$540.00		ACCEPT
Passed	138479103	697305903		4/29/2013			14/25/2013	14/25/2013	\$211.00		ACCEPT
Passed	138465318	697267738		4/28/2013			14/3/2013	14/24/2013	\$256.00		ACCEPT
Passed	138465318	697267737		4/28/2013			14/1/2013	14/21/2013	\$532.00		ACCEPT
Passed	138465318	697267136		4/28/2013			14/22/2013	14/28/2013	\$346.50		ACCEPT

- Clicking on **Export to Excel** will create an excel spreadsheet with the information.

Status	File ID	Payer ID	Claim ID	First	Last	IPatAcctbn	FromDOS	ToDOS	TotalCharg.	MasterVendor	StateLic.en. ID	InsuredID	ReceivedDate
Passed	138459544		697240006				4/15/20B	4/15/20B	225				4/28/2013
Passed	138465318		697267721				4/1/2013	4/22/20B	734				4/28/2013
Passed	138465318		697267733				4/1/2013	4/22/20B	198				4/28/2013
Passed	138465318		697267732				4/2/2013	4/26/20B	320				4/28/2013
Passed	138465318		697267731				4/1/2013	4/18/20B	594				4/28/2013

- If you'd like to print a copy of the claim, click on the blue **Claim ID** as seen below.

Search open 126 claims found

Status	File ID	Claim ID	Payer ID
Passed	138459544	697240806	
Passed	138465318	697267729	

- Once you click on the Claim ID, a copy of the CMS1500/UB04 form will be displayed. From there, you can scroll to the bottom left hand corner and select Print to PDF File.

Pay To City: _____ State: Zip: _____

Pay To Tax ID: _____

Pay To NPI: _____

Pay To IO: _____

[Print ClaimImage](#) [Print To PDF File](#)