

How to create an ANSI 5010 test file for Gateway EDI

Recently Gateway EDI has been suggesting that all of their clients contact them and submit an ANSI 5010 format claim file for testing purposes to ensure that they are ready for the transition. Clients who are running AMS Version 22 already have the ability built-in to create claims with the ANSI 5010 specification. We at AMS are providing this guide to help clients create a test file to submit to Gateway EDI.

Preparation:

IMPORTANT: Before beginning this test, please generate and send all of your current claims to Gateway EDI. This includes any secondary claims that are missing COB information. If you do not know how to resolve secondary COB claims refer to page 6 – 2 of your manual and/or download the white paper by typing the following web address in the Address Bar (not Search Bar) of your web browser http://tech.americanmedical.com/WhitePapers/COB_ELECTRONIC.pdf.

(You will be required to log into the technical support web site using the username and password provided to you by AMS.)

We suggest that clients start out by taking a current backup. You do not need to backup the scanned images for this test since none of the scans will be affected. As long as you follow the instructions below, you should not have any problems that would require the restoration of your data from the backup. The suggestion is merely a precaution.

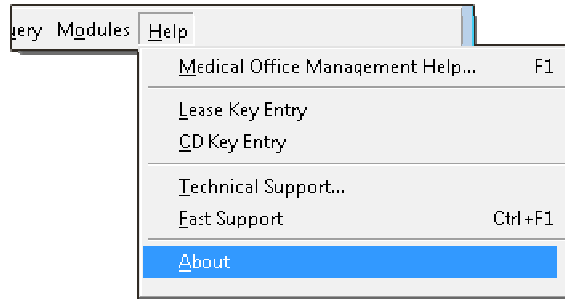
The first step is to determine which insurance carriers you will be using to perform the test steps. The more carriers that you use, the more accurate the test will be with Gateway EDI. We suggest that you test your most common insurance carriers and that you include Medicare, Medicaid and Blue Cross claims in the test. The test file will be created by regenerating a few batches of claims that you have already sent to Gateway EDI. By opening the Claim Generation History Report and viewing the details of a batch you can determine which insurance carriers to use for the test.

NOTE: These claims will be submitted for testing purposes ONLY. They will NOT be processed for payment Gateway EDI.

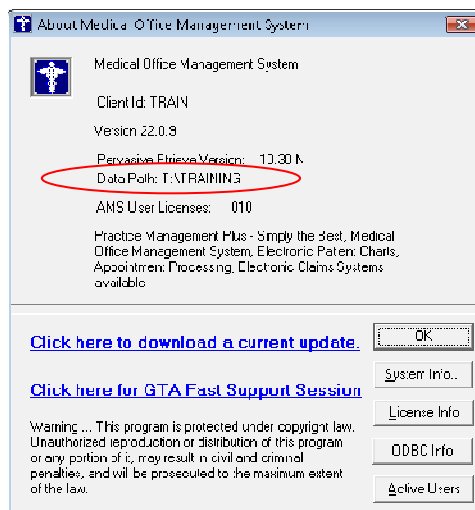
For your convenience, a form has been provided at the end of the document for you to document the ECI Carrier Type for the insurance carriers you are testing with and the AMS Data Path.

Step 1: Document your AMS Data Path, sometimes known as the “Start In Location”.

1. Open Medical Office Management System.
2. Click on “Help” on the top menu bar.
3. Click on “About”



4. Write down the Data Path exactly as it is displayed.



Step 2: Queue a batch of claims (or multiple batches of claims if needed) to regenerate and record the insurance carriers in the batch.

1. Open Medical Office Management System.
2. Click on “Insurance Processing”.
3. Click on “Claim Generation History Report”.
4. Enter a date range in the “Claim Gen Dates” for a period of time during which you generated a total number of electronic claims greater than 25.
5. Highlight the batch of claims that you plan to regenerate for the test and click on the “Regenerate in Next Batch” button.

6. Double click on the batch of claims that you just regenerated to open the Batch Details screen.
7. On the Batch Details screen, click on the column heading of “Ins Cd” to sort the batch by insurance carrier. You will need to scroll down the list and document each insurance carrier in the list on the provided form that you plan to use for testing the ANSI 5010 format. *(It is not necessary to use every single insurance carrier but the more carriers you use now to test, the more accurate the test will be.)*
8. You may repeat the steps above to include multiple batches of claims in the test file so that you have the required claims to test with.
9. When finished, click on “Exit”.

Step 3: Setting the ECI Carrier Type in the Insurance Master to ANSI 5010.

1. Open Medical Office Management System.
2. Click on “File Maintenance”.
3. Click on “Insurance Master Update”.
4. Enter the Carrier Code of the first Insurance Carrier that you are planning to use for testing and press the Enter key on your keyboard.
5. Document the current ECI Carrier Type on the attached documentation form.
6. Change the ECI Carrier Type to “A5 – Ansi 5010x222 837” by selecting it from the drop down list.
7. Click “Save” and repeat the steps above until you are finished changing the ECI Carrier Type for ALL the insurance carriers that you plan to test.

Step 4: Setting up the Electronic Submitter Information.

1. Open Medical Office Management System.
2. Click on “Insurance Processing”.
3. Click on “Electronic Claims Interface”.
4. Answer “Yes” to the prompt asking “Do you wish to generate all new electronic claims which have not been previously filed.”
5. You should get a confirmation of how many claims were generated. These are the claims that you are generating for the test file. Click OK to continue.
6. Click on “Edit Claim File”.
7. Click on the column heading “State” to sort the claims by ECI Carrier Type.
8. Checkmark any claims that do *not* have a state of A5. (If all claims have a state of A5, skip step 9.)
9. Click “Remove Selected Claims”. Click “OK” to confirm that you want to delete the claims.
10. Click “Exit”.
11. Click on “Ansi Transmissions”.

If you currently send your claims in NSF format then you will need to fill out the Ansi submitter information using steps 12 through 15 below. To determine if you currently send in NSF format you can refer to the ECI Carrier Type. If it is set to GW – Gateway EDI NSF, then you send your claims in NSF format. If the ECI Carrier Type is set to AN – Ansi 4010a1 837, you do not need to fill out this information and may skip to step 16.

12. Click on “Submitter Information Ansi”.
13. Click on the “Default Gateway Setup” button.
14. Enter your Gateway EDI Site ID in the the fields ISA-06 Sender Id and Submitter Id.
15. Fill out the rest of the blank fields. (If you are not sure what to use you can click “Exit”, “Exit” again, then click on “Gateway EDI Transmission” and open the “Submitter Information NSF” screen to use as a reference.)

If you have more than one Insurance Personalization record, you will need to click on the “Next” button and repeat steps 12 – 15 for each record.

16. Click on “Compress Claims”.
17. It will warn you that “Compressing claims will transfer the file into a format that will be transmitted ...”, Click “Yes” to continue.
18. If you receive a warning that you are Skipping Claims which are missing COB information you can ignore it and click on “Yes” to continue.
19. The Status will count up the bytes compressed. When it says “Compression Complete – File Ready to Transmit”, click on “Exit”.
20. Click on “Gateway EDI Transmission”.
21. “Gateway Edi Webclaims”. This will open the Gateway EDI website.

Step 5: Sending the Claim to Gateway EDI.

Note: These steps below are controlled by Gateway EDI and are subject to change. If you need assistance with the steps below or if they have changed and you need assistance uploading the test file, please contact Gateway EDI technical support by calling 1-800-969-3666.

1. Log into the Gateway EDI website.
2. Under “Manage Claims”, click on “Send/Receive Files”.
3. Click on the link “Send 5010 Test Files” which is located below the box where you select the files that you wish to send and receive.
4. This will take you to a page where you need to select a claim file to upload, click “Browse”.
5. Browse the network to the AMS Data Folder (WINDIR or WINDIR\FILESx). This is what you wrote down in Step 1 for the AMS Data Path. Once you have opened the AMS Data folder, browse to the SendFiles folder and highlight the file named ANSI5010.TXT or ANSI5010-xxx.TXT.
6. Click on “Open”, this will return you to the Select a claim file to upload screen.
7. Click on the “Upload” button. You should get a message that states “Your file [FILENAME] was uploaded successfully.”

Step 6: Cleanup

1. Open Medical Office Management System.
2. Click on "Insurance Processing".
3. Click on "Electronic Claims Interface".
4. Answer "No" to the prompt asking "Do you wish to generate all new electronic claims which have not been previously filed."
5. Click on "Edit Claim File"
6. If there are claims in the list, Click "Select All". If there are no claims listed, continue to step 9.
7. Click "Remove Selected Claims". Click "OK" to confirm that you want to delete the claims. This will remove any secondary claims that were not compressed due to missing COB information.
8. Click "Exit".
9. Click "Exit".
10. Click on "File Maintenance".
11. Click on "Insurance Master Update".
12. Enter the Carrier Code of the first Insurance Carrier that you are planning to use for testing and press the Enter key on your keyboard.
13. Change the ECI Carrier Type back to the original type by selecting it from the drop down list.
14. Click "Save" and repeat steps 12 – 14 until you are finished changing the ECI Carrier Type for ALL the insurance carriers that you tested back to the original ECI Carrier Type settings.
15. When finished click "Exit".

ANSI 5010 Test File Details

Insurance Carriers Included in the ANSI 5010 Test File

Fill in the Insurance Carrier Code and ECI Carrier Type in the table below

INSURANCE CODE(S)							
INS CD	TYPE		INS CD	TYPE		INS CD	TYPE

Example:

INS CD	TYPE
0MA	GW

ECI Carrier Type

NO – Not an Electronic Carrier

GW – Gateway EDI NSF

GU – Gateway EDI UB04 (UB claims currently are not ready for testing)

AN – Ansi 4010a1 837

PF – Print to File

AMS Data Path (a.k.a. Start In folder)

(Example: \\Server\Windir\ or M:\)
