

# Crystal PM / Trizetto Integration



These are the instructions to set up and use the Trizetto integration for the following features:

- [Claims: Setup](#)
- [Claims: Batching Claims](#)
- [Remits: Auto-posting Remits](#)
- [Remits: Setup](#)
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## CLAIMS SETUP:

It is recommended that you are set up to send and receive ANSI formatted claims and reports. ANSI is a file format that is transmitted to your clearinghouse.

To set up ANSI, go to Admin > Company > CMS Form/ANSI 5010 tab.

1. Check the “Use CMS FORM 02/12” box.

2. Check the box that says “Use ANSI 5010 billing”.

3. Enter the following information:

Amounts are in = US Dollars  
Office ID = (your Site ID)  
File Receiver = Gateway EDI  
Receiver ID = 431420764

General Billing CMS Form / ANSI 5010 Records Security Locations

Use CMS FORM 02/12  
 Support for Batching Claims Secondary Insurance  
 CMS: Always Patient Payment Amount \$0.00  
 Always Send Patient's Signature Date to Invoice Date  
 Do Not Display Prompt for Claims Added to Batch  
 Increase CMS Font Size (Recommendation: leave unchecked)  
 Do Not Prompt for CMS 1500 Form when Editing Invoice  
Facility NPI: 123456789

Use ANSI 5010 billing  
Location prefix

ANSI Info  
Amounts are in: USD  
Office ID: V120  
File Receiver: GatewayEDI  
Receiver ID: 431420764

ANSI "Pay To" Address

4. Enter your group NPI in Admin > Company

5. In Admin > Company > Billing tab, enter your company Tax ID.

6. First, go to Admin > Company > Billing tab, check the box labeled “Enable Trizetto Enhanced Integration” and enter your site ID, your website password, and your FTP password.

**You will need to get your FTP password from Trizetto directly.**

7. In Admin > Insurance > CMS Form for each insurance:

- Enter the payer ID in box 10D

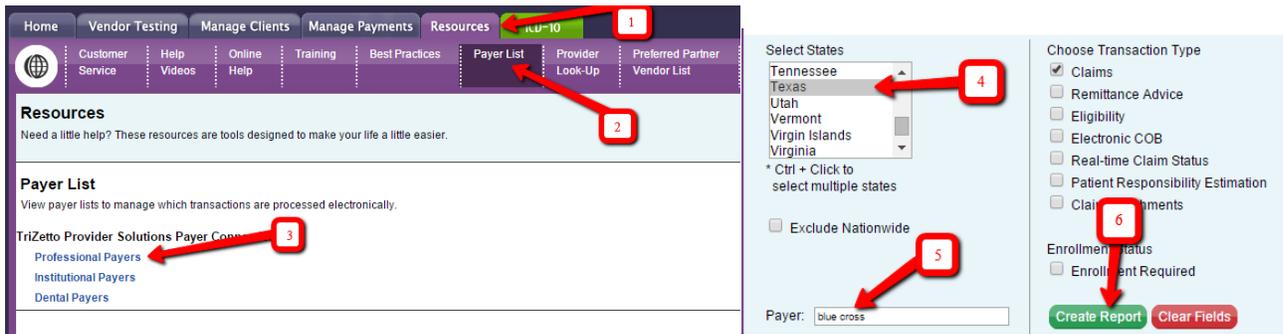
*To find a list of payer IDs on the Trizetto website:*

1. *click on Resources*
2. *click on Payer List*
3. *click on Professional Payers*
4. *select your state*
5. *enter part of the insurance name in the payer field*
6. *click Create Report button*

Trizetto / GatewayEDI Apex EDI OMS/ZirMed H-Link (Alberta)

Enable Trizetto Enhanced Integration

Settings  
Username: V120  
Web Password: \*\*\*\*\*  
FTP Password: \*\*\*\*\*



- Select the appropriate button for Box 1 (i.e. Medicare, Medicaid, Group Health Plan, BCBS, etc.)
- On the very bottom, right corner, leave the group box checked if you want to file that insurance with your group NPI and group name. Uncheck the box if you want to file with the individual doctor’s name and NPI.

\*\*\* Everything else on the CMS form can be left blank. The information will pull from other areas of the software.\*\*\*

- On the Information tab, check the “Automatically add to batch” box if you want the claim to be created and added to batch any time an invoice is created for this insurance. (optional)
- On the Information tab, also make sure that every insurance and plan has a name in both the “Insurance Name” box and the “Abbrev” box.

8. Make sure your doctors have their individual NPI populated in Admin > Employees.

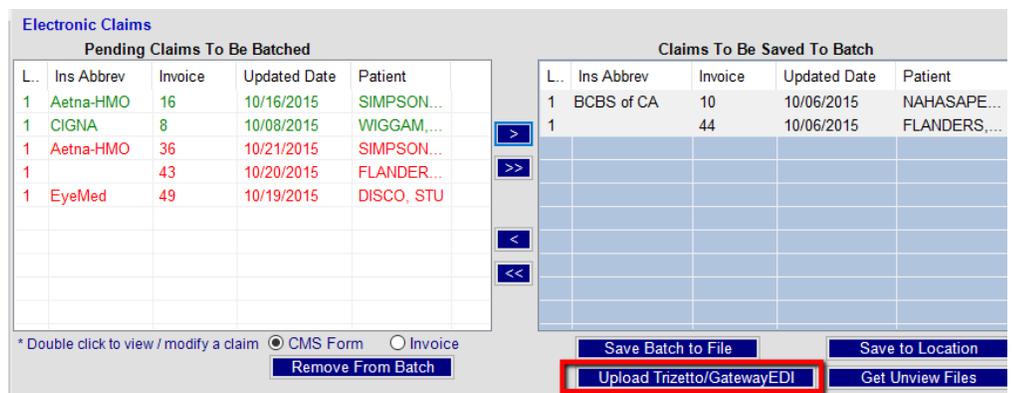
9. Make sure your company name, address (with 9 digit zip) and phone number are populated in Admin > Company.



10. Referring / ordering / supervising providers can be added in Admin > Defaults > Patient Page Defaults > Professional Referral. After adding the name, double click to open the demographics boxes. Be sure to add the name (last, first) and NPI at the bottom.

## BATCHING CLAIMS:

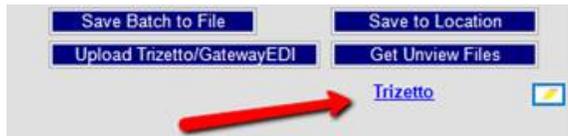
To batch claims to Trizetto, go to Admin > E Claims. The claims you’ve already added to the batch will be in the white “holding tank” on the left. Simply move the claims you want to send from the left to the right box and click the “Upload Trizetto/Gateway EDI” button.



Another new feature is a Clearinghouse hyperlink. In Admin > E Claims, enter your clearinghouse name and website URL



And then click the box to the far right to create the hyperlink that should look like this:



This allows you to more easily access your clearinghouse website to confirm file delivery and review reports.

## REMITTS:

For remits, go to Reports > Insurance Receivable > Mass Insurance Check, then there will be a button on the bottom left called "Import Remit from Trizetto".

When you click that, a white box will open with the remits.

SFTP Results

Date	Insurance	Check Num
	05202	
	71412	
	87726	



If you double click on a remit, it will auto post that remit into Crystal.

**\*\*You must complete the remit setup shown below before this function is available.\*\***

## REMIT SETUP:

To set up this remit feature, go to <https://mytools.gatewayedi.com/> and log in.

**\*\*IMPORTANT\*\*** You must first archive any existing remittances or you may lose them when the make the following changes.

1. Click on the "My Account" tab on the far right side of the screen



2. Go to "Manage Product Files and Specifications".
3. Click on "Remittance Advice Settings".
4. Enter the following settings:

### File Format

- X12 835 4010
- X12 835 5010
- Nsf 2.01

**\*\*Leave the "835 Remittances" section blank.\*\***

### Posting

- Include NPIs When Returned By Payer
- Calculate Allowed Amount (AMT\*B6)
- Plug Provider Id with Fed Id
- Auto Generate Remittances
- Post Remittances To Alternate Site
- Use TriZetto Provider Solutions Payer IDs and Names for Remittances
- Generate Only One Set of Header & Trailer Records Per Remittance File
- Batch Checks By Check Date
- Do Not Merge Posted Files With Existing Batches
- Suppress Remittance Claim Status Report

### Editing

- Allow Check Date Editing
- Show Worked Information
- Show Header Information During Print

### FTP File Name Options

*Only for clients who download files via FTP*

- Replace Spaces With Underscore in File Name
- Use Name From Edit Remit File Specifications
- Use Default File Name
- Use Multiple File Name Options
  - Use Check Number in File Name
  - Use Check Amount in File Name
  - Use Check Date in File Name
  - Use Payer Name in File Name
  - Use NPI in File Name
  - Use Tax ID in File Name

5. Click "Save Changes".

### **ELIGIBILITY:**

If you signed up for the eligibility feature with Trizetto (additional costs may apply), when you go to Patients > Insurance, you'll see a button "Get Gateway EDI Info".

Vision - Primary    Medical - Primary    Vision - Secondary    Medical - Sec

Name: UNITED HEALTHCARE

ID #: 54815264    **ssn**

Policy Group #:

Co Payment: 0.00

Get GatewayEDI Info

**UnitedHealthcare**    Customer Logo Here

Health Plan (2024) 911-87726-04

Member ID: 999999876    Group Number: 987654

Subscriber: SUBSCRIBER | BROWN    Sponsor OR Containr Name: SPONSOR OR CONTAINER NAME

Dependent: SPOUSE | BROWN    Second Line of Sponsor Name: SECOND LINE OF SPONSOR NAME

Paper ID: 87726   
 
 monitor  
No. Br: 51224  
No. Sp: 12HEALTH

Copy Office / Spec / CR / LMC    2024 - 2024    2024 - 2024

UnitedHealthcare Optima, PPO    Underwritten by UnitedHealthcare Insurance Company

Clicking this will open an eligibility box. You must select the doctor in the top dropdown and then indicate with the check boxes if you want to see medical benefits, vision benefits, or all. Then click "Check Eligibility".

GatewayEDI / Trizetto Integration

Provider: Dr. Hibbert, Julius    123456789

Insurance: MEDICARE    123456

**Subscriber Information**

First: AGNES    Last: SKINNER

ID: 12345678943    Date of Birth: 07/21/1922

Male     Female

**Dependent Information**

First:     Last:

ID:     Date of Birth:

Male     Female

Check ELIGIBILITY

All  
 Check Vision Codes (AL-Vision, AM-Frames, AN-Routine Exam, AO-Lenses, CP-Eyewear)  
 Check Medical Code (1,30, BR)  
 Other

\*\*Please note that you MUST have your payer IDs entered in box 10d of each insurance CMS form (found in Admin > Insurance). Also, some payers require a provider ID in order to submit eligibility requests. That number can be entered in the box on the top, right corner.