Crystal PM / Trizetto Integration

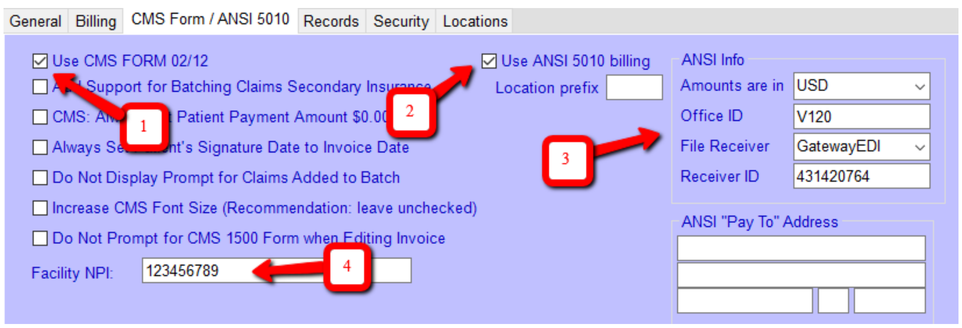
These are the instructions to set up and use the Trizetto integration for the following features:

- Claims: Setup
- Claims: Batching Claims
- Remits: Auto-posting Remits
- Remits: Setup
- Eligibility: Electronic Eligibility

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

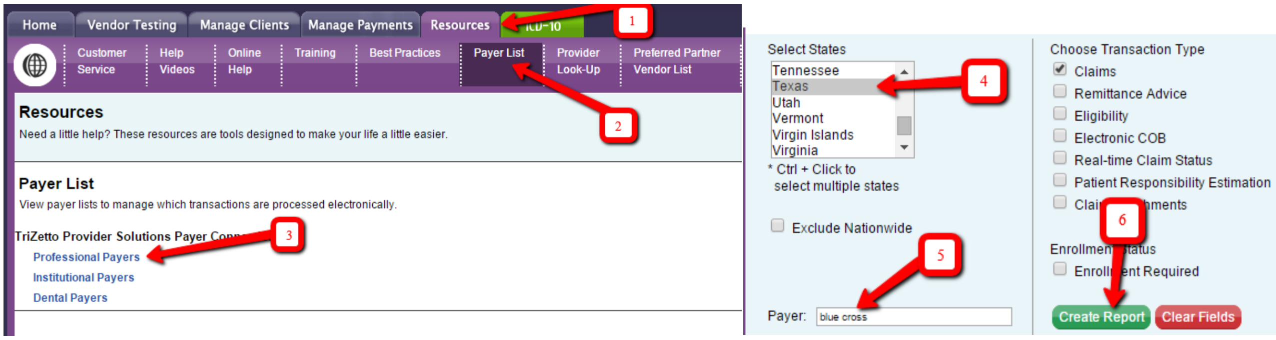
4. Enter your group NPI in Admin > Company

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 <u>for each insurance</u>:

➢ 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*



- 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.

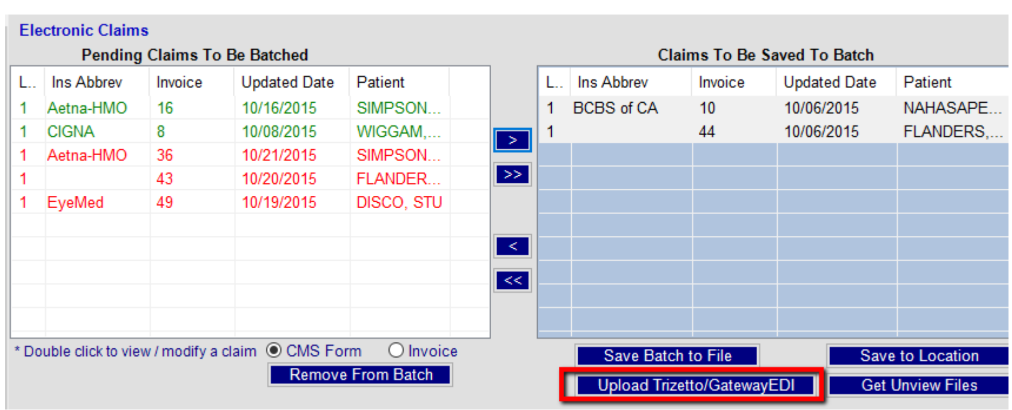
8. Make sure your doctors have their individual NPI populated in Admin > Employees.

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.

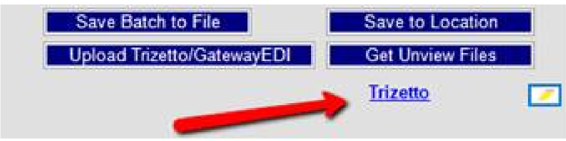
BATCHING CLAIMS:

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:

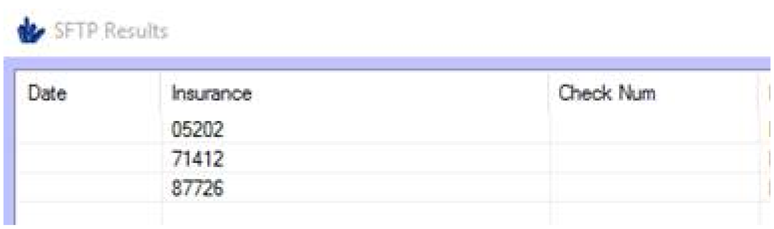


This allows you to more easily access your clearinghouse website to confirm file delivery and review reports.

REMITS:

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.



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:

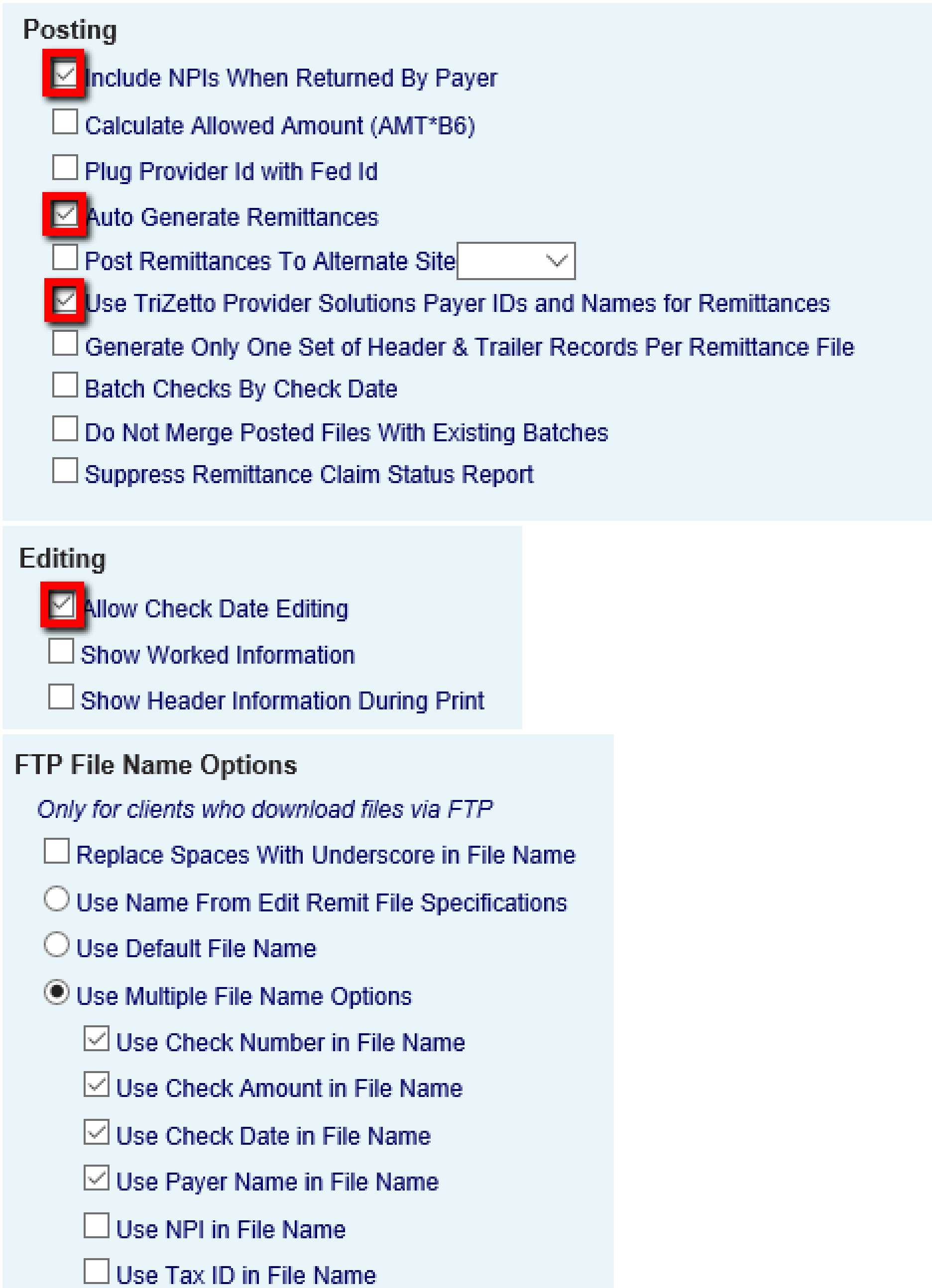
To set up this remit feature, go to https://mytools.gatewayedi.com/ and log in.

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:

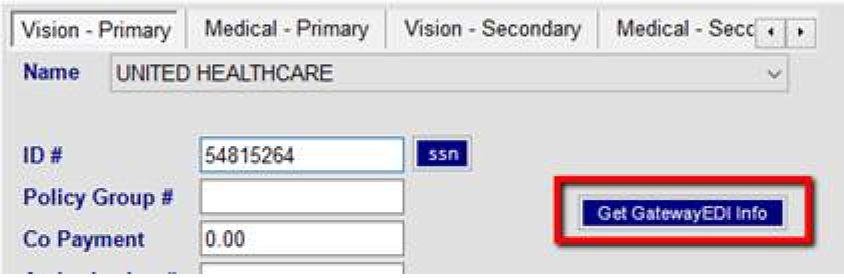
Leave the "835 Remittances" section blank.



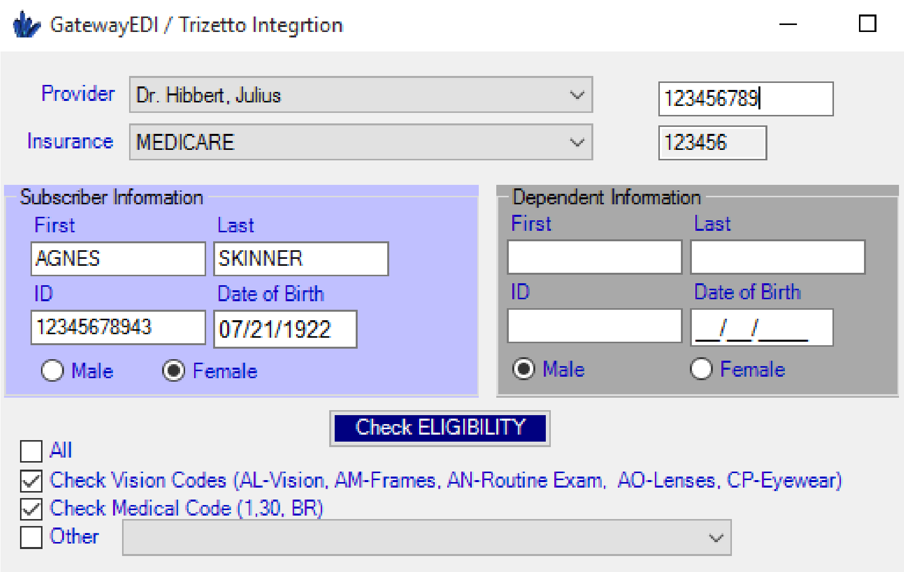
5. Click "Save Changes".

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".



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”.



**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.