

SimpleClaim™

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Product Overview

TriZetto Provider Solutions' SimpleClaim™ product provides a Direct Data Entry solution for providers that do not have a Practice Management System for claims submission. It offers the capabilities to create and save patient profiles, create both professional and institutional claims, and offers a claims archive to edit and resubmit previously processed claims. The solution is only available for primary claims.

Accessing SimpleClaim

SimpleClaim can be accessed on your home page, under the *Send/Receive* section. This will open an additional tab in your web browser.



SimpleClaim History Search

The *SimpleClaim History Search* is a quick link to search all of your submitted claims. You may use the *Search By* drop down list to choose the best search criteria to fit your needs.

Please note that if you utilize the SimpleClaim product as well as a Practice Management Software to submit claims, you may use the Advanced Search to filter these from each other. Once this option is selected, use the filter on the right hand side for *SimpleClaim™*.

Manage Claims Submission List

The *Manage Claims Submission List* will show a list of claims that have been created, but not yet submitted to the payer for processing. Claims can be edited, deleted, or submitted from here.

Manage Claim Submission List Create Professional Claim Create Institutional Claim Manage Patient Profiles New Patient Profile Claim Archives

Manage Claim Submission List

Find the status of a saved claim or group of claims

Patient Last Name: Patient Account Number: Date of Service From:

Patient First Name: Payer Name: To:

[Create Report](#) [Clear Fields](#)

[Show Rejection Details](#) [Submit Selected Claims](#)

<input type="checkbox"/>	Type	Patient Name	Payer	Provider	Date of Service	Charge	Patient Number	Status	Saved Date	
1	<input type="checkbox"/> P	August, John	United Healthcare - Metra	Duffy, Michael	10/1/2015	\$150.00	0000155	Invalid	10/1/2015	Edit Delete
2	<input type="checkbox"/> P	TEST, JIM	Affinity Medical Solution	Mobile Audiology Associates PC	9/30/2015	\$25.00	0000149	Valid	9/30/2015	Edit Delete
3	<input type="checkbox"/> I	LAHIVE, MARY	Blue Cross of California	OZ Dynamic Therapy	8/9/2015	\$5,720.00	0000146	Valid	9/30/2015	Edit Delete

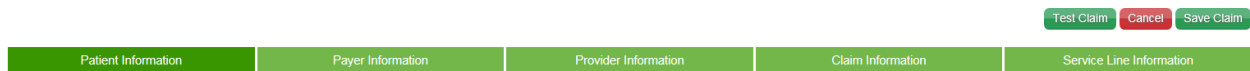
50 items per page 1 - 3 of 3 items

Create Professional Claim

To create a professional claim, simply select this option at the top:



The product is broken into 5 sections for data entry: *Patient Information*, *Payer Information*, *Provider Information*, *Claim Information*, and *Service Line Information*.



A few key features under each of these tabs are included below:

Patient Information

Patient Account #: You may select the *Auto Generate Account* box to have a patient account number automatically assigned, otherwise you may enter your own in the free text box. The account number that is submitted on the claim will also update in the patient profile.

Search Patient: This will allow the user to select a patient with an existing profile (see more on creating patient profiles on page 9). If a patient is selected, all information from the patient profile will automatically populate in the corresponding fields.

Please note that once a claim is submitted and if the *Search Patient* feature wasn't used, the system will automatically check if there is an existing patient profile with that account number already. If there is not, it will save the patient as a new patient profile. To eliminate the chance of creating multiple patient profiles for the same patient, we recommend to use the Search Patient option when a patient profile already exists.

Payer Information

Search Primary Payer: This will pull the full list of payers and will state if it's professional or institutional. You can search by payer ID, payer name, or claim type, and the payer ID/name field allows for free text. Once you identify the needed payer, simply choose *select*.

Search Secondary Payer: This will pull the full list of payers and will state if it's professional or institutional. You can search by payer ID, payer name, or claim type, and the payer ID/name field allows for free text. Once you identify the needed payer, simply choose *select*.

Provider Information

Search Billing/Rending Provider: This will pull up a list of all providers that we have on file for your account.

Search Service Facility: This will pull up a list of all service facilities that we have on file for your account

Claim Information

General Information: This section includes the fields to populate the basic claim data in your file.

Ambulance Information: This section includes the necessary fields to populate ambulance or emergency transportation claims.

Attachments: This section includes the fields to populate the PWK claim supplemental information segment on your claim if you plan on sending additional notes or documentation to the payer.


Service Line Information

ICD Version Indicator: This will allow you to search by either ICD-9 or ICD-10 codes. Once your selection is made in the drop down, choose the *View ICD Codes* box. You may search by either the code or description and the results will pull anything with the specified digits. Once you identify your needed code, select the diagnosis code box you would like it to appear in and then “*add code*” and it will populate in the chosen box.

Add Service Line: This will add an additional service line to the top, pushing existing service lines down a line

Move Service Line: This will move a service line up by one service line

Delete Service Line: This will delete the indicated service line

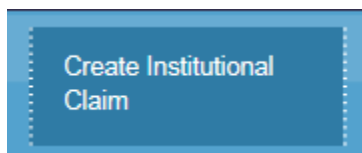
CPT/HCPCS Code : This will allow you to search by the code or description. Simply enter your data and the results will pull anything with the specified digits. Once you identify your needed code, select the diagnosis code box you would like it to appear in and then “*add code*” and it will be populated in the chosen box

Additional Information: This section includes fields to populate additional service line data.

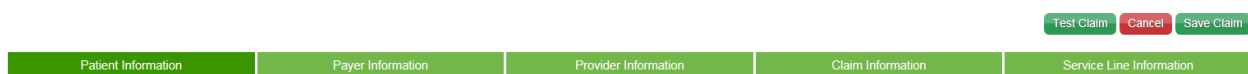
Ambulance Information: This section includes the necessary fields to populate at the service line level for ambulance or emergency transportation claims.

Create Institutional Claims

To create an institutional claim, simply select this option at the top:



The product is broken into 5 sections for data entry: *Patient Information, Payer Information, Provider Information, Claim Information, Service Line Information.*



A few key features under each of these tabs are included below:

Patient Information

Patient Account #: You may select the *Auto Generate Account* box to have a patient account number automatically assigned, otherwise you may enter your own in the free text box. The account number that is submitted on the claim will also update in the patient profile.

Search Patient: This will allow the user to select a patient with an existing profile (see more on creating patient profiles on page 10). If a patient is selected, all information from the patient profile will automatically populate in the corresponding fields.

Please note that once a claim is submitted and if the *Search Patient* feature wasn't used, the system will automatically check if there is an existing patient profile with that account number already. If there is not, it will save the patient as a new patient profile. To eliminate the chance of creating multiple patient profiles for the same patient, we recommend to use the Search Patient option when a patient profile already exists.

Payer Information

Search Primary Payer: This will pull the full list of payers and will state if it's professional or institutional. You can search by payer ID, payer name, or claim type, and the payer ID/name field allows for free text. Once you identify the needed payer, simply choose *select*.

Search Secondary Payer: This will pull the full list of payers and will state if it's professional or institutional. You can search by payer ID, payer name, or claim type, and the payer ID/name field allows for free text. Once you identify the needed payer, simply choose *select*.

Provider Information

Search Billing/Attending/Rending Provider: This will pull up a list of all providers that we have on file for your account.

Search Service Facility: This will pull up a list of all service facilities that we have on file for your account

Claim Information


Industry Codes: Each of these is a look up feature for the indicated field that allows you to search by the code or description. Simply enter your data and the results will pull anything with the specified digits. Once you identify your needed code, select the "*add code*" and it will populated in the chosen box

Service Line Information

Add Service Line: This will add an additional service line to the top, pushing existing service lines down a line

Move Service Line: This will move a service line up by one service line

Delete Service Line: This will delete the indicated service line

CPT/HCPCS Code  : This will allow you to search by the code or description. Simply enter your data and the results will pull anything with the specified digits. Once you identify your needed code, select the diagnosis code box you would like it to appear in and then “*add code*” and it will be populated in the chosen box

Test/Save a Claim

Once all claim information has been entered, you must first select the *Test* button. If there are any errors, they will be displayed. Once errors are fixed, you can click test again and the error section will go away if everything has been corrected.

Please note that you cannot select the *Save* option until the claim has first been tested. Once tested, this option will no longer be grayed out and will be available for selection.

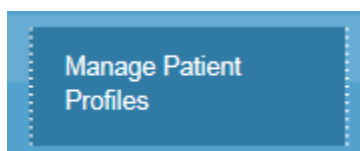
Submit a Claim

Once your claim data has been entered, tested, and saved, the claim will show up in the Manage Claims Submission List. If the status is listed as Valid, the claim has passed the first level edits and is ready to be submitted to the payer. Select the checkbox to the corresponding claim and choose the *Submit Selected Claims* box.

If the status is listed as Invalid, then corrections will need to be made to the claim before it can be submitted. Simply select the *Edit* option to make the necessary changes.

Manage Patient Profiles

To view a list of all patient profiles in the SimpleClaim product, simply select this option from the ribbon at the top:



Search, View, and Edit Patient Profiles

- **Search:** You can search for a particular patient's profile by using the search fields at the top. Simply type in one of the fields using a full or partial name and the results will pull any patients with the specified characters. Once search criteria is entered, select *Create Report* or you can use the *Clear Fields* option to start your search over.
- **Edit:** The results will be displayed at the bottom of the page. Simply select the patient account that you would like to view and it will open their full profile. The patient's profile will be displayed on 2 tabs: Patient Information and Payer Information

You can make any necessary changes to the patient's profile from here. Once changes are made, be sure to select the *Save* button before leaving the screen. This will only change their profile on future claims, previously submitted claims will not reflect the changes

Create Claim from Patient Profile

Once you locate and open a patient's saved profile, you can make any needed changes and select *Save & Create Claim* to generate a new claim from this screen.

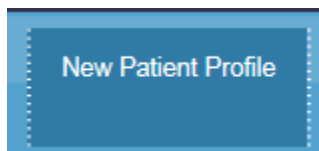
Archiving/Activating Patients

The Manage Patient Profiles view will default to only display active patient accounts.

- **View Archived Patients:** Simply check the box under the search options for *Show Archived Patients*.
- **Archive a Patient:** Once in a specific patient's profile, check the *Archive Patient* box in the upper right hand corner
- **Activate a Patient:** Once in a specific patient's profile, un check the *Archive Patient* box in the upper right hand corner

New Patient Profile

To create a new patient profile, simply select this option from the ribbon at the top:



Patient profiles can be created and saved for each patient a claim will be submitted for, prior to submitting the claim.

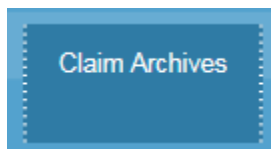
You may select the *Auto Generate Account* box to have a patient account number automatically assigned, otherwise you may enter your own in the free text box..

The patient's profile will be displayed on 2 tabs: Patient Information and Payer Information. The user will want to be sure to populate all required fields in both sections.

Please note that patient profiles can also be created from a submitted claim. Once a claim is submitted, it will check if there is an existing patient profile with that account number already. If there is not, it will save the patient as a new patient profile. To eliminate the chance of creating multiple patient profiles for the same patient, we recommend to use the Search Patient option when a patient profile already exists.

Claim Archives

Claim Archives can be viewed by simply selecting this option from the ribbon at the top:



Claim Archives shows all previously submitted claims using the SimpleClaim product. This view defaults to showing the newest submission date on top. Claims can be edited and saved for resubmission from this section.

- **Search:** You can search for a previously submitted claim by using the search fields at the top. Simply type in one of the fields using full or partial data and the results will pull any claims with the specified characters. Once search criteria is entered, select Create Report or you can use the Clear Fields option to start your search over.
- **View:** The results will be displayed at the bottom of the page. Simply select the claim that you would like to view and it will open all 5 sections of the claim.
- **Edit and Save:** You can make any necessary changes to the claim from here and save it for resubmission. Once changes are made, you must first select the Test Claim option to identify any errors. You may then select the Save Claim button which will save the claim back to the Manage Claims Submission List for resubmission. Please note that this will create a new claim and the original claim will still exist in your archives.