

# EZ-EDI Tips & Tricks

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# Course Outline

- Duplicate file check
- In-load multiple submitter files by single login
- Route Claims based on Eligibility
- Combine batches
- Report ERA/835 per Receiver
- Report zero dollar adjustment amount
- 835 Outbound Exclusions
- EDI outbound Indicator
- Reduce number of 837 outbound jobs
- File Naming Convention
- Interchange Control Number (ISA13)



# Course Outline

- Non-specific procedure code description
- Report zero patient paid amount
- 837 Outbound Exclusions
- Import and Export Custom Maps
- EZ-EDI Map Editor
- Eligibility Enrollment – MPI Match Criteria
- EA Global Configuration
- Possible duplicate member – Attach / Detach
- Default Address 1 and Default Address 2



# Prevent Duplicate File Upload

- New functionality to prevent loading duplicate records into EZ-CAP
- Duplicate check available for ASC X12 and EPF files.
- Configuration based on ISA elements for ASC X12 files.

## File Upload Duplicate Check

☒ Enable Duplicate Check for File upload

☒ ASC X12

☐ Interchange Sender (ISA06)

☐ Interchange Control No. (ISA13)

☐ ISA Receiver (ISA08)

☐ Group Control No (GS06)

☐ ISA Date (ISA09)

☐ File Name

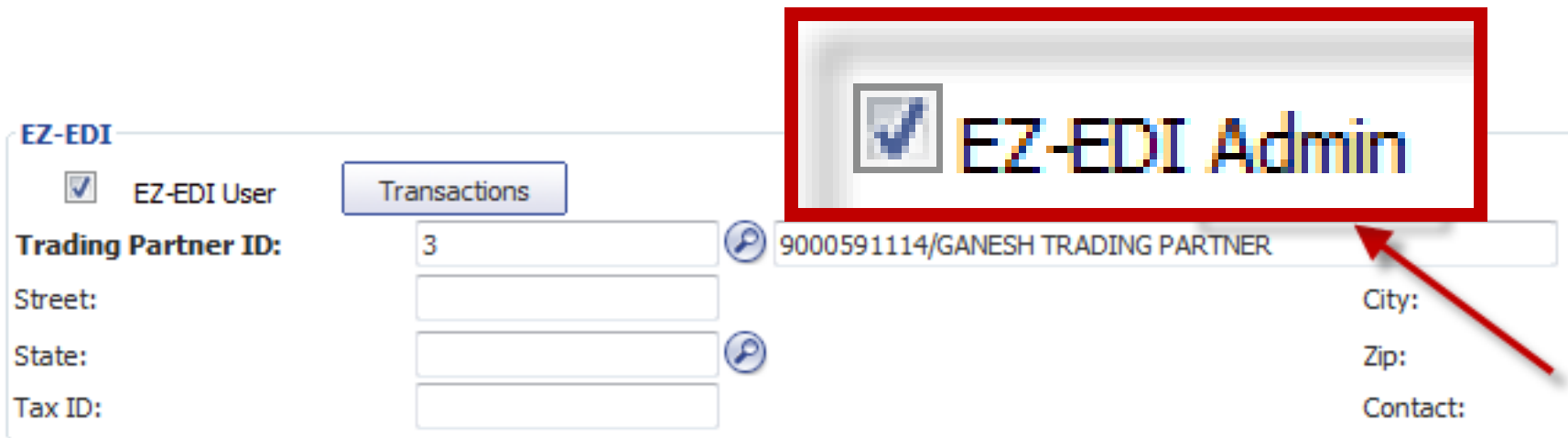
☐ ISA Time (ISA10)

☒ EPF

☒ File Name

## Single user can upload EDI files for ANY Trading Partner

- EZ-EDI Admin is enhanced to upload multiple submitter files with single login.
- The Sender ID in the file should be a valid trading partner in the system.
- The user should be an EZ-EDI Admin.



**EZ-EDI**

☒ EZ-EDI User Transactions

**Trading Partner ID:**  9000591114/GANESH TRADING PARTNER

Street:

State:

Tax ID:

City:

Zip:

Contact:

# Route Claims based on Eligibility

- The claims are routed to a specific company based on Receiver ID in the

Trading Partner | Contact | **Inbound Envelope** | Outbound Envelope | Inbound Transactions | Outbound Transactions | Inbound Transactions

Trade Partner Code: **9000591114** | Trade Partner Name: **GANESH TRADING PARTNER**

**Interchange Information**

Auth Info. Qualifier (ISA01):	00	▼	Authorization Info (ISA02):	
Security Info. Qualifier (ISA03):	00	▼	Security Info. (ISA04):	
Interchange ID Qualifier (ISA05):	01	▼	Interchange Sender ID(ISA06):	9000591114
Interchange ID Qualifier (ISA07):	01	▼	Interchange Receiver ID(ISA08):	
Version No. (ISA12):	00501	▼	Interchange Control No. (ISA13):	1

☒ **Enable Routing of Claims based on Eligibility**

- “Enable Routing of Claims based on Eligibility” configured at Trading Partner level.

# Combine Batches during Claims Inload

- Batches are created for each ST/SE transaction set in the file.
- Transaction Sets can be combined into single “batch” based on the trading partner configuration.

## Hospital Claims 837I

Version: 005010X223A2  
 Mode: R-REALTIME  
 EDI Map: COB MAPPING  
 Functional Acknowledgement (997): ☐  
 Implementation Acknowledgement (999) ☐

### ☐ COMBINE BATCHES IN FILE INTO ONE

- |  |   |
|--|---|
| <input type="checkbox"/> Transaction Type Code               | <input type="checkbox"/> Submitter Contact Name |
| <input type="checkbox"/> Submitter Last or Organization Name | <input type="checkbox"/> Submitter FAX          |
| <input type="checkbox"/> Submitter First Name                | <input type="checkbox"/> Submitter PHONE        |
| <input type="checkbox"/> Submitter Middle Name or Initial    | <input type="checkbox"/> Submitter EXTENSION    |
| <input type="checkbox"/> Submitter Identifier                | <input type="checkbox"/> Receiver Name          |
| <input type="checkbox"/> Receiver Primary Identifier         |   |

## Professional Claims 837P

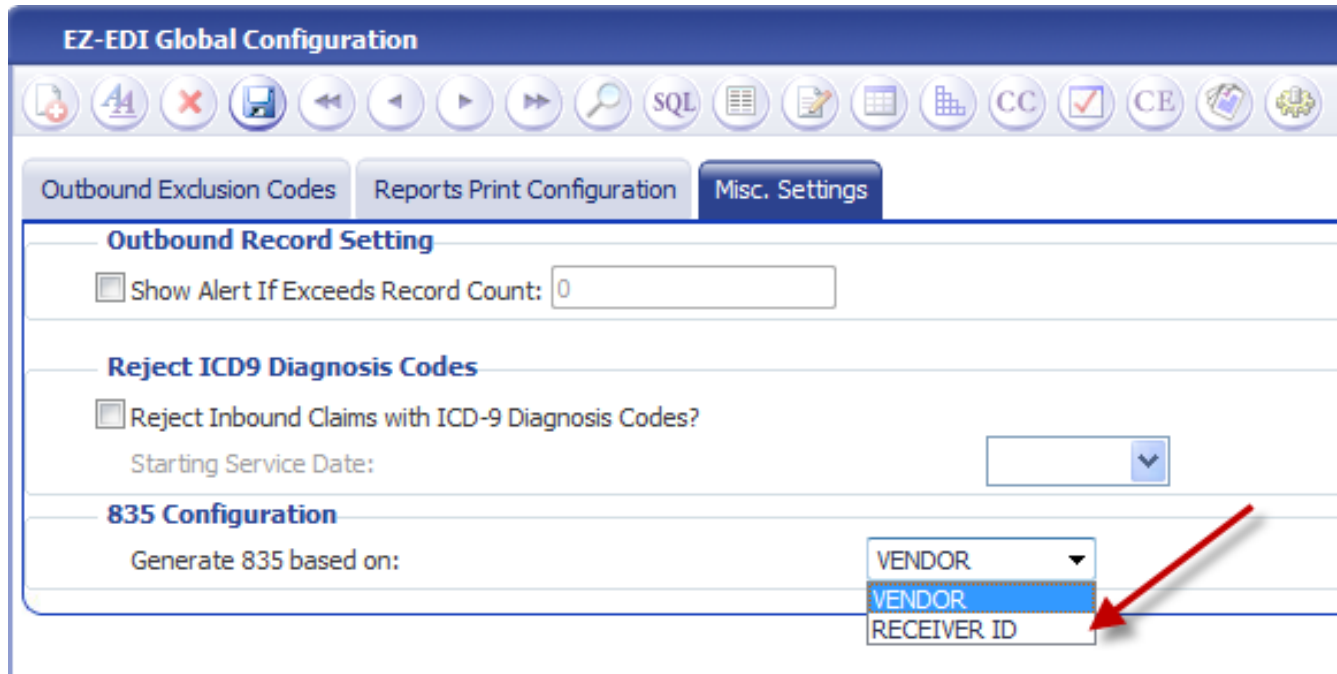
Version: 005010X222A1  
 Mode: R-REALTIME  
 EDI Map: ENCOUNTER AND CLAIM  
 Functional Acknowledgement (997): ☐  
 Implementation Acknowledgement (999) ☐

### ☒ COMBINE BATCHES IN FILE INTO ONE

- |   |  |
|---|--|
| <input checked="" type="checkbox"/> Transaction Type Code               | <input checked="" type="checkbox"/> Submitter Contact Name |
| <input checked="" type="checkbox"/> Submitter Last or Organization Name | <input checked="" type="checkbox"/> Submitter FAX          |
| <input checked="" type="checkbox"/> Submitter First Name                | <input checked="" type="checkbox"/> Submitter PHONE        |
| <input checked="" type="checkbox"/> Submitter Middle Name or Initial    | <input checked="" type="checkbox"/> Submitter EXTENSION    |
| <input checked="" type="checkbox"/> Submitter Identifier                | <input checked="" type="checkbox"/> Receiver Name          |
| <input checked="" type="checkbox"/> Receiver Primary Identifier         |  |

## Combine ERA/835 for each Receiver

- Prior to 6.5.2, Electronic Remittance Advice ERA (835) file is generated for each vendor irrespective of Receiving Trading Partner.
- ERA/835 file can now be generated for each Receive.



**EZ-EDI Global Configuration**

Outbound Exclusion Codes | Reports Print Configuration | **Misc. Settings**

**Outbound Record Setting**

☐ Show Alert If Exceeds Record Count: 0

**Reject ICD9 Diagnosis Codes**

☐ Reject Inbound Claims with ICD-9 Diagnosis Codes?

Starting Service Date:  ▼

**835 Configuration**

Generate 835 based on:

VENDOR ▼

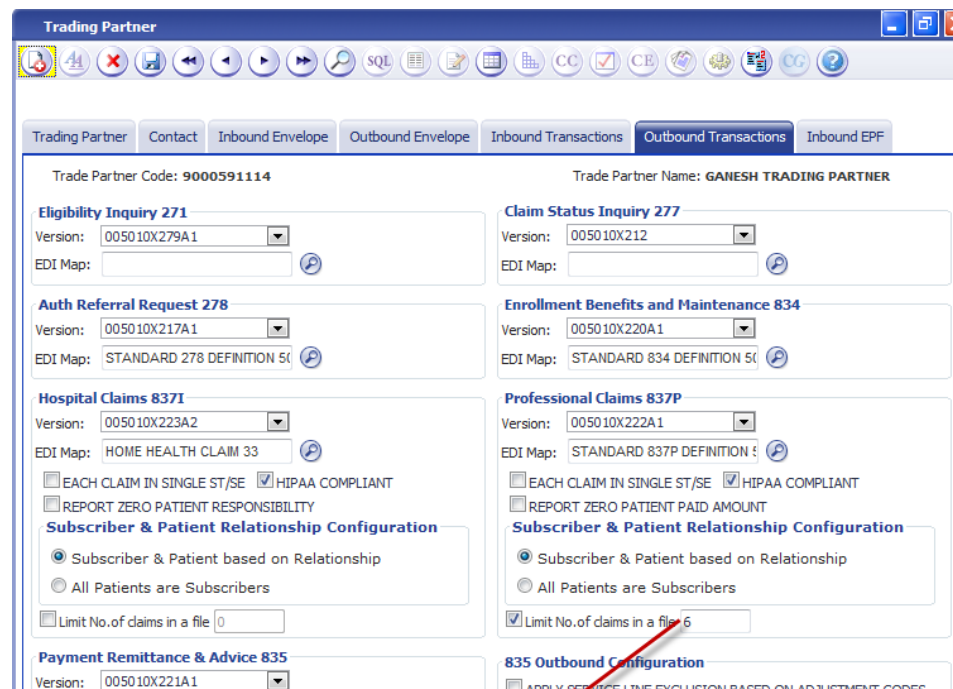
VENDOR

RECEIVER ID



# Report Zero dollar Adjustment Amount in ERA/835

- As per TR3, CAS segment will not be generated for zero dollar amount.
- Configuration at trading partner level to Report ERA/835 with zero dollar as adjustment amount in CAS segments.



The screenshot shows the 'Trading Partner' configuration window. The 'Outbound Transactions' tab is selected. The 'Trade Partner Code' is 9000591114 and the 'Trade Partner Name' is GANESH TRADING PARTNER. The window is divided into several sections for different EDI transactions:

- Eligibility Inquiry 271:** Version: 005010X279A1, EDI Map: (empty)
- Claim Status Inquiry 277:** Version: 005010X212, EDI Map: (empty)
- Auth Referral Request 278:** Version: 005010X217A1, EDI Map: STANDARD 278 DEFINITION 50
- Enrollment Benefits and Maintenance 834:** Version: 005010X220A1, EDI Map: STANDARD 834 DEFINITION 50
- Hospital Claims 837I:** Version: 005010X223A2, EDI Map: HOME HEALTH CLAIM 33. Checkboxes: ☐ EACH CLAIM IN SINGLE ST/SE, ☒ HIPAA COMPLIANT, ☐ REPORT ZERO PATIENT RESPONSIBILITY.
- Professional Claims 837P:** Version: 005010X222A1, EDI Map: STANDARD 837P DEFINITION 50. Checkboxes: ☐ EACH CLAIM IN SINGLE ST/SE, ☒ HIPAA COMPLIANT, ☐ REPORT ZERO PATIENT PAID AMOUNT.
- Subscriber & Patient Relationship Configuration:** Radio buttons: ☒ Subscriber & Patient based on Relationship, ☐ All Patients are Subscribers. Input: Limit No. of claims in a file 0.
- Payment Remittance & Advice 835:** Version: 005010X221A1
- 835 Outbound Configuration:** ☐ APPLY SERVICE LINE EXCLUSION BASED ON ADJUSTMENT CODES



GENERATE CAS SEGMENTS WITH ADJUSTMENT AMOUNT ZERO

# 835 Exclusions

- Report ERA/835 by excluding the claims based on Adjustment Codes.
- Add or delete Adjustment Reason Codes in 835 Exclusion Codes.

The screenshot shows the 'EZ-EDI Global Configuration' window with the 'Outbound Exclusion Codes' tab selected. The '835 Exclusion Codes' section is expanded, showing 'Adjustment Reason Codes'. The interface includes input fields for 'Include:', 'Exclude:', 'In Range:', 'Not In Range:', 'In List:', and 'Not In List:'. There are also 'To:' fields for the range inputs. A list of adjustment reason codes is shown on the right, with a preview of the code '\*INCLUDE {18}'. Buttons for 'Preview...' and 'Delete' are visible.

# EDI Outbound Indicator

- Ability to set the EDI Outbound Indicator (on claim screen in EZ-CAP) in Outbound Processing screen.
- Filter claims using EDI Outbound Indicator in Outbound Processing Screen to avoid duplicate submission of same claim.

Outbound Processing 837 Professional

Sort OK

Available Company(s) Selected Company(s)

KENDB - KENDB  
MIKEDB - MIKEDB  
SUEDB - SUEDB

**Update EDI Outbound Indicator in EZ-CAP**

Field Operator Value(s)

STATUS  
HEALTHPLAN OPTION  
VENDOR ID  
PROVIDER ID  
PROVIDER SPECIALTY CODE  
PLACE OF SERVICE CODE  
HEALTHPLAN OPTION LINE OF BUSINESS  
CLAIM NUMBER  
MEMBER ID  
REVERSED CLAIM  
CLAIM FREQUENCY CODE  
DATE RECEIVED  
EOB INDICATOR  
COB  
PAYER RESPONSIBILITY  
FACILITY  
PRIMARY DIAGNOSIS  
OUTCOME  
ENCOUNTERS  
REMITTANCE ADVICE CODE  
# OF UNITS  
FACILITY ID CODE  
REFERRING PROVIDER ID  
PROVIDER CLAIM ID  
CROSS REFERENCE ID  
SERVICE FACILITY (32)  
BILLING PROVIDER (33)  
UDF1  
UDF2  
CASE #  
EDI OUTBOUND INDICATOR

Operator Value(s)

Operator	Value		
BETWEEN	13072204920000500001 AND 130722...	OR	
=	20130710920000300001	OR	
=	20130716900000200002	OR	
BETWEEN	13072204920000400001 AND 130722...		

Add Delete

Operator Values



# EDI Outbound Indicator in EZ-CAP

- “EDI Outbound Indicator” to mark the claims generated for encounter submission in Professional & Institutional Claims

Professional Claim 20130711900000400003 MEMBER: VA1234 ADAM, VICTOR B

Professional Claim Information updated successfully

Claim Pg1 Prov pg2 Member Pg3 Diagnosis Pg4 Miscellaneous Pg5

Professional Claim: 20130711900000400003 Member ID: VA1234 Company ID: SUEDB SUEDB

Status: 1 RELEASE TO A/P Date Received: 07/11/2013

Service Date From: 03/10/2013 Auth/Referral #(23):

General Information

Member ID: VA1234 ADAM, VICTOR B

Provider ID: GJ888 JOHNSON, GREG B

Primary Diagnosis (21a): 007.0 BALANTIDIASIS

Birth Date(3):

Place of Service(24b)

Outcome:

Encounters:

EDI Claim #

☐ EDI Outbound Indicator

Sequence	From Date	To Date	Service	Mod	Diag	Qty	blmed	Contract	Net Pay	Bundler Type
1	03/10/2013	03/10/2013	P- 144	47	A	1.0	2000.00	1500.00	1425.00	



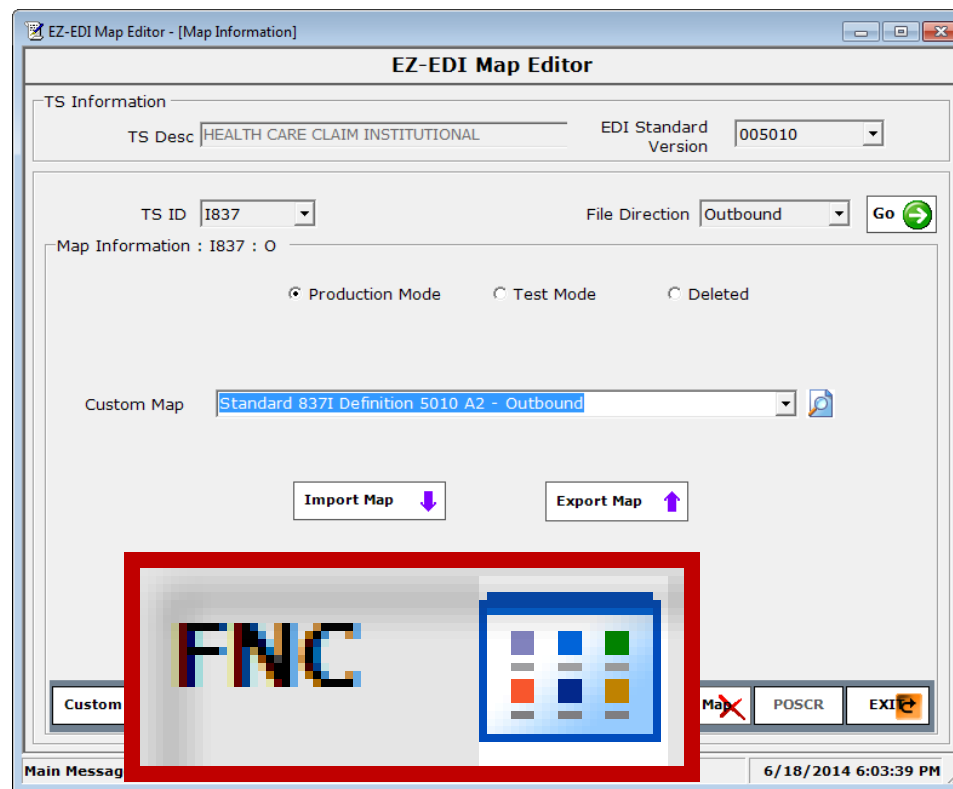
**UConn<sup>14</sup>** | PARTNERS IN PROGRESS  
together on the path to value-based care

- 

CURRENT DAY  
CURRENT WEEK  
CURRENT MONTH  
PREVIOUS DAY  
PREVIOUS WEEK  
PREVIOUS MONTH

# File Naming Convention

- Configure File Naming Convention in EZ-EDI Map Editor
- Generate outbound file name based on the File Naming Convention.



# File Naming Convention

- Select delimiters and extension of your own choice.
- Select the field names from the drop down list.
- Assign Constant value or Sequence number in the file name.
- Preview the sample file name before save.

The screenshot shows the 'EZ-EDI Map Editor - [Map Information]' window with the 'FileNameConvention' dialog box open. The dialog box has a title bar 'EZ-EDI Map Editor' and a subtitle 'FileNameConvention'. It contains several buttons at the top: 'New', 'Edit', 'Delete', 'Save', 'FNCLIST', 'Clear', and 'Close'. Below these buttons, there are input fields for 'Formula Name' (containing 'FILENAME1'), 'File Extension' (containing 'EDI'), and 'Delimiter' (empty). There are also two dropdown menus: 'Elements' (set to 'Select') and 'Format' (set to 'Select'). Below these are 'Add' and 'Delete' buttons. A table is displayed with two columns: 'Element' and 'Format'. The table contains the following rows:

Element	Format
CompanyID	<CompanyID>
SenderID	<SenderID>
FileID	<FileID>
Constant	T

Below the table are 'Down' and 'Up' buttons. At the bottom right is a 'Preview' button. The preview text at the bottom of the dialog box is '<CompanyID>\_<SenderID>\_<FileID>\_T.EDI'. The background window shows a 'Main Message' area at the bottom with the date and time '4/23/2013 5:20:15 PM'.

# File Naming Convention

- Select the File Naming Convention in Outbound Processing screen before Job run.

**Outbound Processing 837 Professional**

Sort New Copy Delete Save Search Run

Job ID :  Job Name :

**Available Company(s)**

**Selected Company(s)**

SUEDB - SUEDB

Submitter ID (ISA06) :  Receiver ID (ISA08) :

**File Name :** SELECT FILE NAME

# OF UNITS  =

Select all records where...

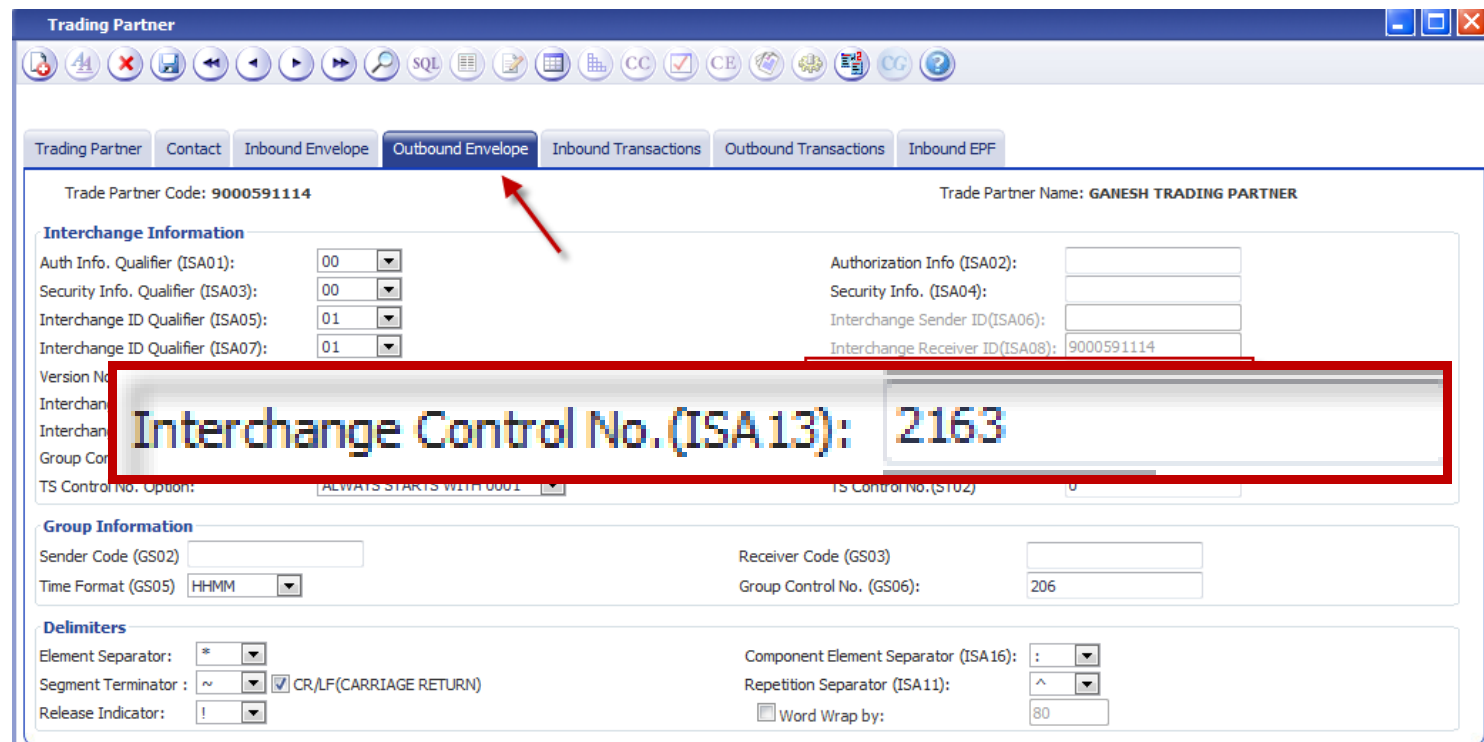
	Field	Operator	Value
	PROFESSIONAL CLAIM #	=	14052905900000200003

Add Delete



# Interchange Control Number (ISA13)

- Set the starting Interchange Control Number (ISA13) value in Trading Partner → Outbound Envelope.



Trading Partner

Trade Partner Code: 9000591114 Trade Partner Name: GANESH TRADING PARTNER

**Interchange Information**

Auth Info. Qualifier (ISA01): 00  
 Security Info. Qualifier (ISA03): 00  
 Interchange ID Qualifier (ISA05): 01  
 Interchange ID Qualifier (ISA07): 01

Authorization Info (ISA02):  
 Security Info. (ISA04):  
 Interchange Sender ID (ISA06):  
 Interchange Receiver ID (ISA08): 9000591114

**Interchange Control No. (ISA 13): 2163**

TS Control No. Option: ALWAYS STARTS WITH 0001 TS Control No. (ST02): 0

**Group Information**

Sender Code (GS02): Receiver Code (GS03):  
 Time Format (GS05): HHMM Group Control No. (GS06): 206

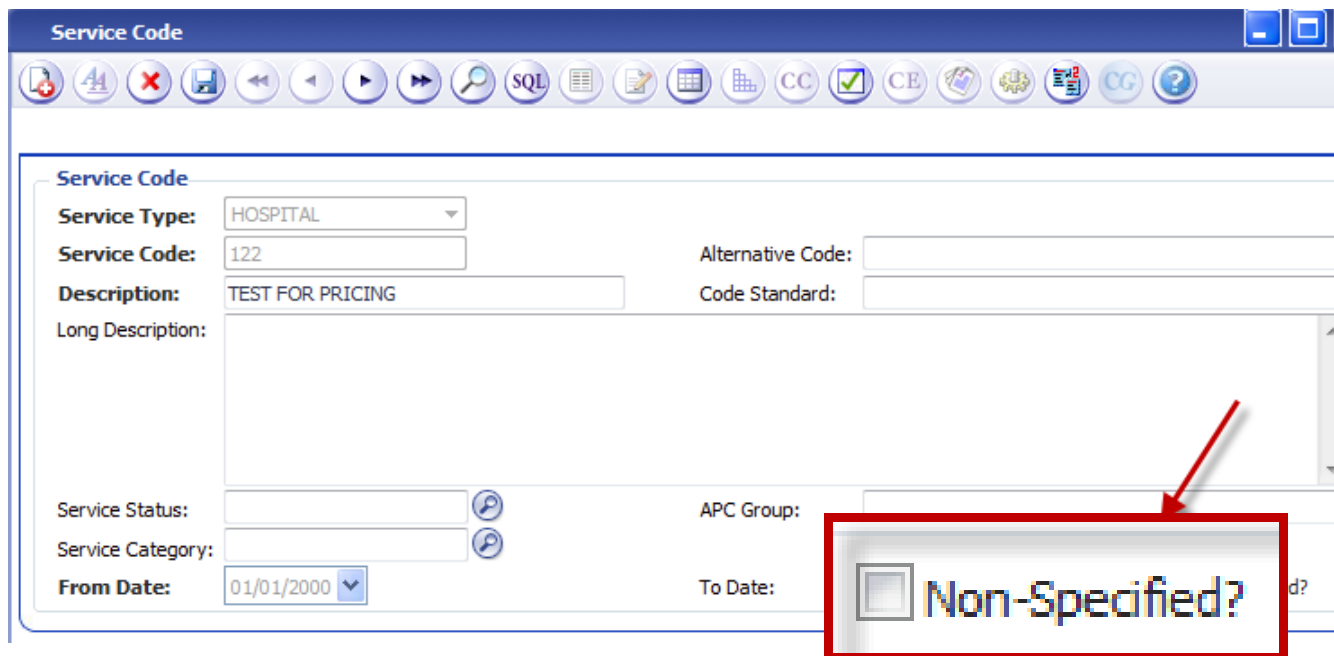
**Delimiters**

Element Separator: \*  
 Segment Terminator: ~ CR/LF (CARRIAGE RETURN)  
 Release Indicator: !

Component Element Separator (ISA16): :  
 Repetition Separator (ISA11): ^  
 Word Wrap by: 80

# Non-specific Procedure Code Description

- Some specific Procedure Code requires description in the outbound file per TR3.
- Turn on “Non-Specified?” checkbox in Service Code module to generate description of the procedure code in 837 Outbound.



**Service Code**

Service Type: HOSPITAL

Service Code: 122

Description: TEST FOR PRICING

Long Description:

Service Status:

Service Category:

From Date: 01/01/2000

Alternative Code:

Code Standard:

APC Group:

To Date:

☐ Non-Specified?

# Report Zero Dollar Patient Paid Amount

- Some health plans require 837I Outbound with AMT\*F3 Segment and 837P Outbound with AMT\*F5 Segment in loop 2300 for each claim even when the patient responsibility is zero dollars.

Trading Partner | Contact | Inbound Envelope | Outbound Envelope | Inbound Transactions | **Outbound Transactions** | Inbound EPF

Trade Partner Code: 9000591114 | Trade Partner Name: GANESH TRADING PARTNER

<b>Eligibility Inquiry 271</b> Version: 005010X279A1 EDI Map:	<b>Claim Status Inquiry 277</b> Version: 005010X212 EDI Map:
<b>Auth Referral Request 278</b> Version: 005010X217A1 EDI Map: STANDARD 278 DEFINITION 50	<b>Enrollment Benefits and Maintenance 834</b> Version: 005010X220A1 EDI Map: STANDARD 834 DEFINITION 50
<b>Hospital Claims 837I</b> Version: 005010X223A2 EDI Map: HOME HEALTH CLAIM 33	<b>Professional Claims 837P</b> Version: 005010X222A1 EDI Map: STANDARD 837P DEFINITION 50

**REPORT ZERO PATIENT RESPONSIBILITY**

<b>Payment Remittance &amp; Advice 835</b> Version: 005010X221A1 EDI Map: STANDARD 835 DEFINITION 50	<b>835 Outbound Configuration</b> <input type="checkbox"/> APPLY SERVICE LINE EXCLUSION BASED ON ADJUSTMENT CODES <input type="checkbox"/> GENERATE CAS SEGMENTS WITH ADJUSTMENT AMOUNT ZERO <input type="checkbox"/> GENERATE CAS SEGMENTS WITH ADJUSTMENT AMOUNT ZERO
--	--

## 837 Outbound Exclusions

- Encounter report can be generated excluding the service lines or claims based on Procedure Codes, Diagnosis Codes or Adjustment Codes.
- “Outbound Exclusion Codes” configuration is part of “EZ-EDI Global Configuration” menu under EZ-EDI Configuration.

Configurations
Global Configuration
Virtual Environment Configuration
Virtual Environment Status
Company Configuration
Track Login Attempts
EZ-EDI Configuration
Trading Partner
EZ-EDI User Configuration
✓ EZ-EDI Global Configuration
EA Global Configuration
EA Company Configuration
EZ-NET Company Configuration
EZ-NET System Configuration
EZ-NET Limit Rule
EZ-NET Field Access Profile

# 837 Outbound Exclusions

- Prepare 837 Exclusion Codes list for Procedure Codes, Diagnosis Codes and Adjustment Reason Codes.
- Add or delete Procedure Codes, Diagnosis Codes and Adjustment Reason Codes in 837 Exclusion Codes list

**EZ-EDI Global Configuration**

**Outbound Exclusion Codes**

**837 Exclusion Codes**

**Procedure Codes**

Include: P ☐

Exclude: P ☐

In Range: P ☐

Not In Range: P ☐

In List: P ☐

Not In List: P ☐

**837 Exclusion Codes**

**Procedure Codes**

**Diagnosis Codes**

**Adjustment Reason Codes**

**835 Exclusion Codes**

**Adjustment Reason Codes**

Preview...

Delete

# Import and Export Custom Maps

- Store all the custom maps into a single file through Export Custom Map.
- Filter the custom map list by Version, TS ID and Direction.

Version: 005010 TS ID: P837 Direction: 0 Go

<input type="checkbox"/>	Map Name	TSID	Version	Direction
<input type="checkbox"/>	RENDPRO-3319	P837	005010	I
<input type="checkbox"/>	RENDPROV-3319_2			O
<input type="checkbox"/>	RENDPROV-3319			O
<input type="checkbox"/>	BP STREET			O
<input type="checkbox"/>	Claim RARC TESTING			I
<input type="checkbox"/>	837P HNET COB 01 NE			O
<input type="checkbox"/>	UHC_837I_5010_ENCO			O
<input type="checkbox"/>	UHC_837P_5010_ENCO			O
<input checked="" type="checkbox"/>	HEALTH NET_837I_ENC...	1837	005010	O
<input checked="" type="checkbox"/>	HEALTH NET_837P_ENC...	P837	005010	O
<input type="checkbox"/>	837P HNET COB 01 NEW E	P837	005010	O

Give the name with which current file should be saved as  
HEALTH NET MAPS  
Ok Cancel

Total Records : 117

Refresh Cancel Export

Main Message 6/18/2014 6:24:58 PM

# Import and Export Custom Maps

- Import all the custom maps into the system through Import Custom Map.
- If same custom map name is already present in the system import with different name.

Version:  TS ID:  Direction:

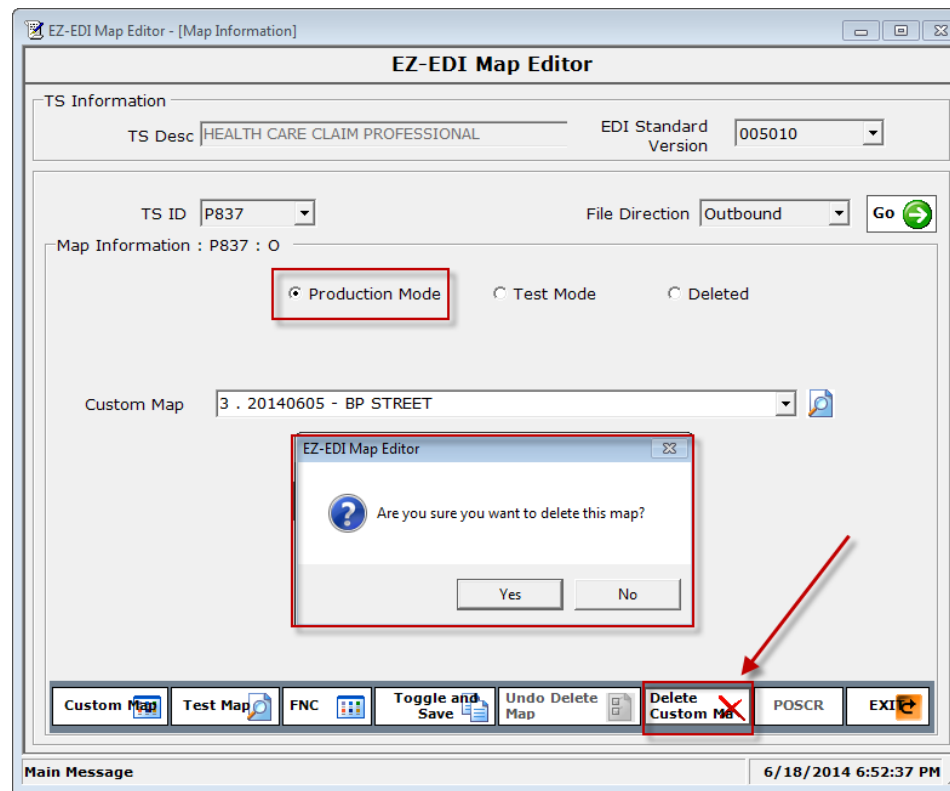
<input checked="" type="checkbox"/>	Map Name	TSID	Version	Direction
<input checked="" type="checkbox"/>	HEALTH NET_837I_ENCO...	1837	005010	O
<input checked="" type="checkbox"/>	HEALTH NET_837P_ENC...	P837	005010	O

Total Records : 2

Main Message 6/18/2014 6:26:06 PM

# EZ-EDI Map Editor

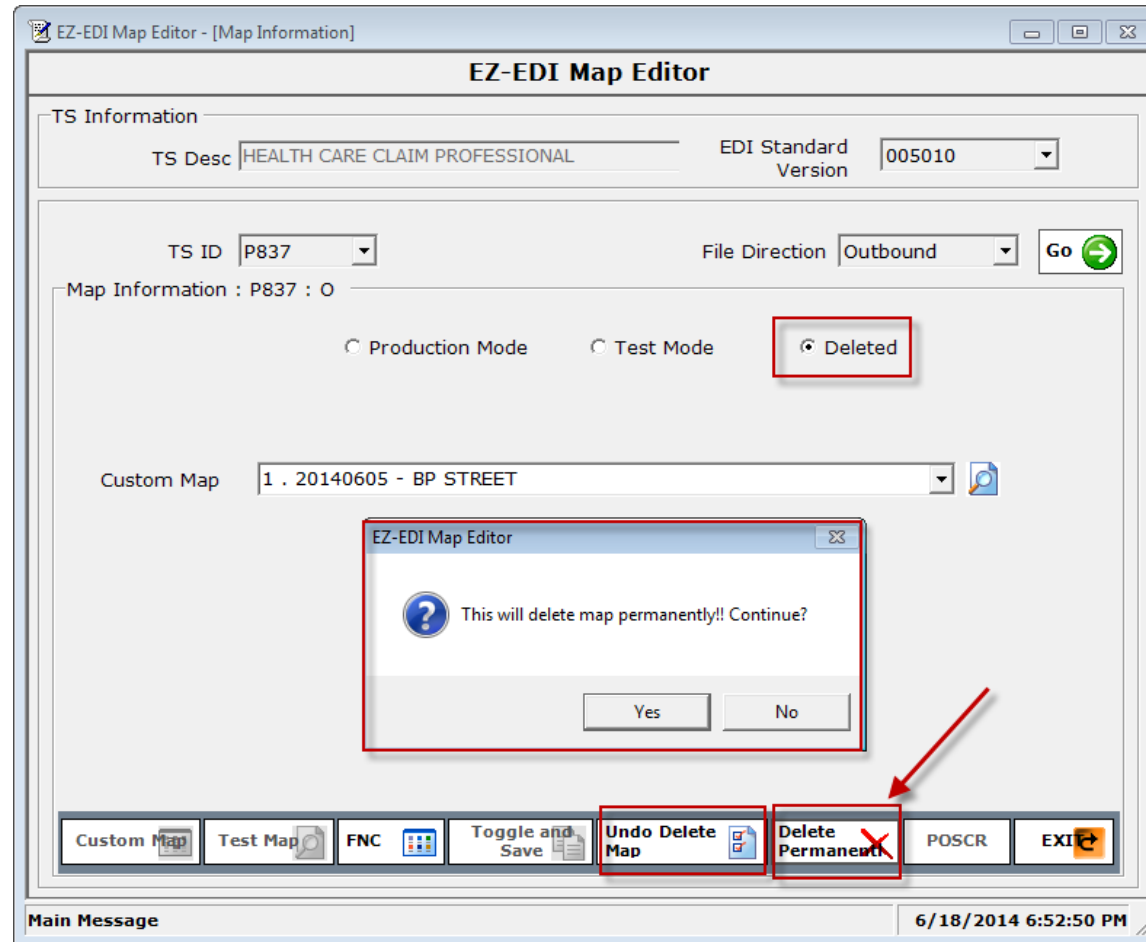
- Delete the custom maps not in use to increase the installation speed.
- Take backup by Export function before deleting the custom maps.





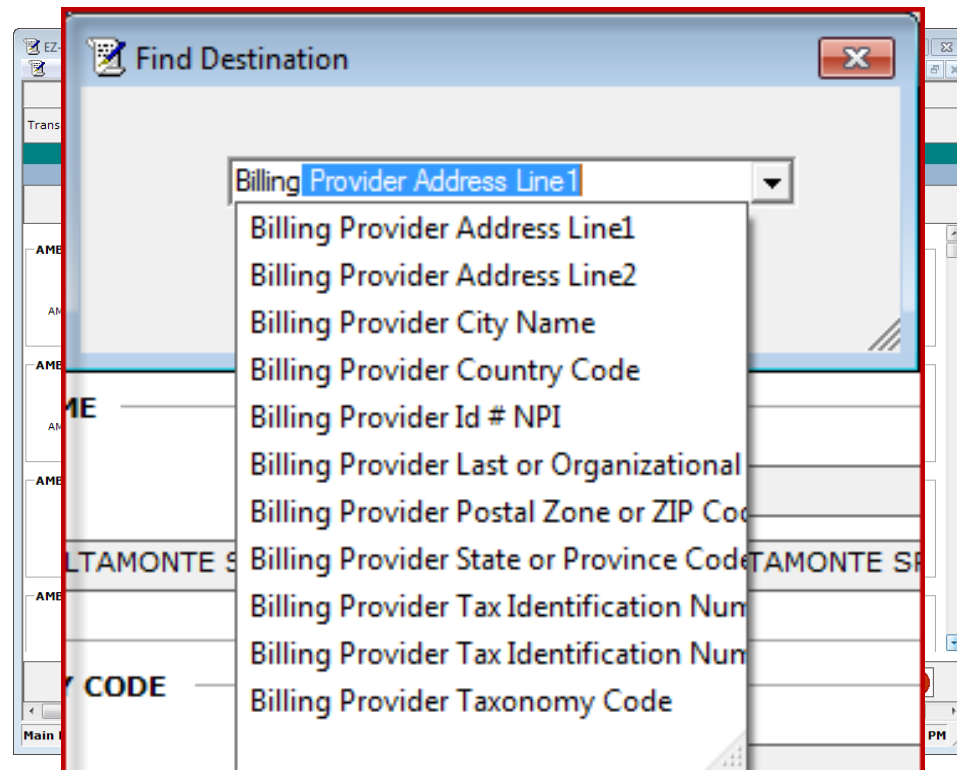
# EZ-EDI Map Editor

- Delete the custom maps permanently which are moved to Deleted mode.



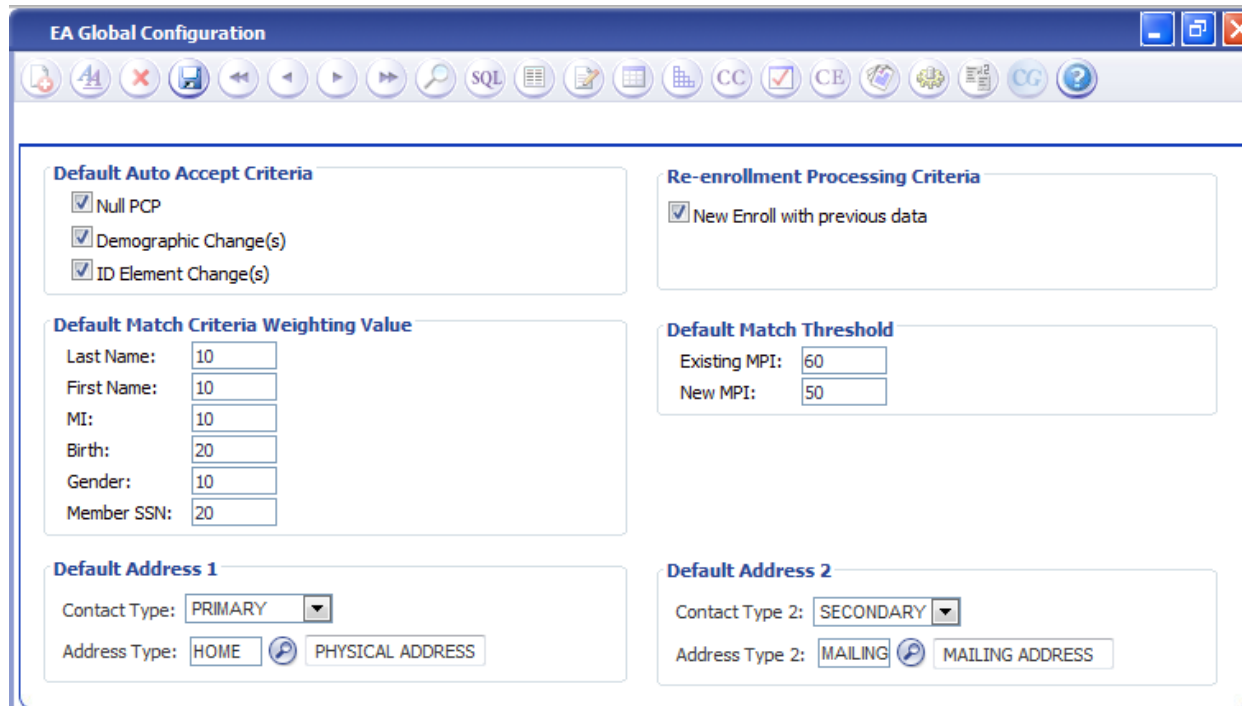
# EZ-EDI Map Editor

- Ctrl + F to search the destination fields in data manipulation.
- Autocomplete suggestions to type the destination field names.



## Eligibility Enrollment – MPI Match Criteria

- MPI Match Criteria is used to determine if a member Add record matches a member record in EZ-CAP's Master Patient Index (MPI) list.



The screenshot shows the 'EA Global Configuration' window with the following settings:

- Default Auto Accept Criteria:**
  - ☒ Null PCP
  - ☒ Demographic Change(s)
  - ☒ ID Element Change(s)
- Re-enrollment Processing Criteria:**
  - ☒ New Enroll with previous data
- Default Match Criteria Weighting Value:**

Last Name:	10
First Name:	10
MI:	10
Birth:	20
Gender:	10
Member SSN:	20
- Default Match Threshold:**

Existing MPI:	60
New MPI:	50
- Default Address 1:**

Contact Type: PRIMARY (dropdown)

Address Type: HOME (radio button) | PHYSICAL ADDRESS (radio button)
- Default Address 2:**

Contact Type 2: SECONDARY (dropdown)

Address Type 2: MAILING (radio button) | MAILING ADDRESS (radio button)

# Eligibility Enrollment – MPI Match Criteria

## Weighting Value

- Sum of the matching field values in the Default Match Criteria Weighting Value.

## Match Threshold – Existing MPI

- If the weighting value matches or greater than Existing MPI threshold then member record that is associated with existing MPI will be attached

## Match Threshold – New MPI

- If the weighting value is less than New MPI threshold then member record will be created in the system with a new MPI
- MPI Match Criteria is not setup for Company and Health plan then it will take the Default Match Criteria Weighting values from EA Global Configuration

# Possible Duplicate Member –Attach / Detach

Eligibility Error Edit -- Webpage Dialog

Eligibility Error Edit

Batch ID : 12

Close Save Changes Print this page

Error

A POSSIBLE DUPLICATE MEMBER. MPI RECORD EXISTS

Transaction: A

Company ID: MZHC

Member ID: 2013102701 NOVEMBER AUGUST

Member SSN:

Last Name: NOVEMBER

Suffix:

First Name: AUGUST

Gender: M

Middle Name:

Marital Status:

Birth Date: 19501027

Birth Seq:

Death Date:

Relation: 18 SELF

Language:

Ethnicity:

Citizenship:

Employment Status:

MPI Attach -- Webpage Dialog

Last Name: NOVEMBER

Member SSN:

Attach

Detach

Clear

First Name:

Middle Name:

Date Of Birth: 10/27/1950

Gender: MALE

Create New MPI

Search Again

Close

Member ID(rt-clk for det)	Member Name	Gender	Birth Date	Company Name	Last Name
2010102701	NOVEMBER OZZIE	MALE	10/27/1950	MZHC	NOVEMBER

Last Name, Middle Name, Gender and Birth Date matches.

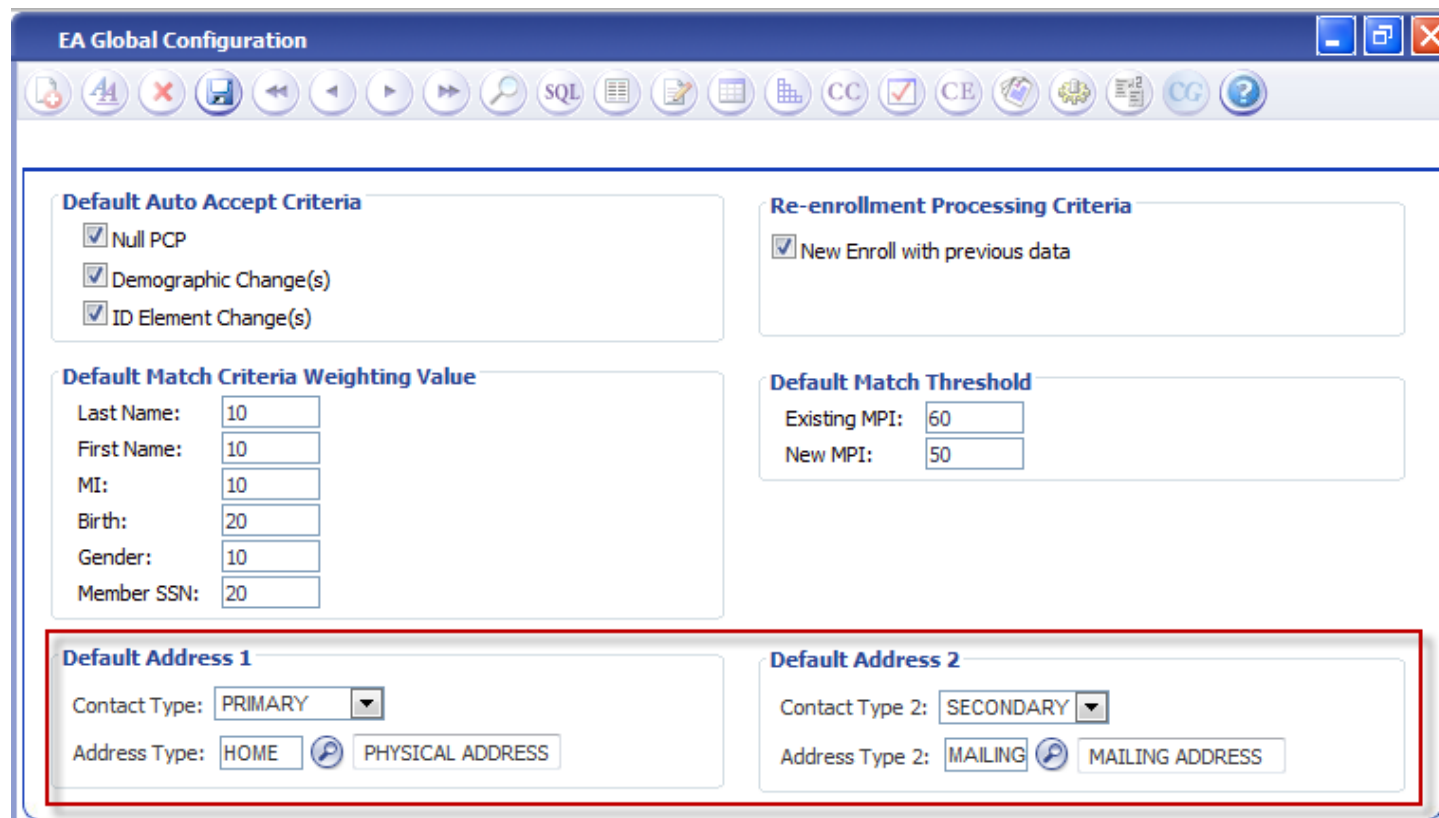
Score = 10 + 0 + 10 + 20 + 10 + 0

= 50 = New MPI threshold value

"Possible Duplicate Member MPI" comes when score is between New and Existing MPI Threshold

## Default Address 1 & Default Address 2

- EZ-EDI Inbound stores and updates address types specified under Default Address 1 and Default Address 2 in EA Global Configuration



**EA Global Configuration**

**Default Auto Accept Criteria**

- ☒ Null PCP
- ☒ Demographic Change(s)
- ☒ ID Element Change(s)

**Re-enrollment Processing Criteria**

- ☒ New Enroll with previous data

**Default Match Criteria Weighting Value**

Last Name: 10  
First Name: 10  
MI: 10  
Birth: 20  
Gender: 10  
Member SSN: 20

**Default Match Threshold**

Existing MPI: 60  
New MPI: 50

**Default Address 1**

Contact Type: PRIMARY  
Address Type: HOME PHYSICAL ADDRESS

**Default Address 2**

Contact Type 2: SECONDARY  
Address Type 2: MAILING MAILING ADDRESS

# Thank you

## Q&A

