

## SCO Standardized Billing - ASAP Preparation Guide

This guide presents instructions for important tasks to prepare your ASAP for using SAMS Claims for SCO billing. Completing these required preparation steps before “go live” will help this billing process change go smoothly.

- ✚ Consult the project website, <http://sco-standardized-billing.800ageinfo.com/> , for additional materials, including the **SCO Claims – Quick Start Guide**
- ✚ For detailed information on SAMS claims, refer to the **SAMS Claims User Guide**, found on the Mediware portal page

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## I. Online Registration Tasks

### a. Enroll to receive 835s (Electronic Remittance Advice) from SCOs as required

The following SCOs require that ASAPs enroll to receive the 835 files: United, Fallon, Tufts, and Boston Medical Center. **This is a time sensitive step, as it can take up to 30 days to process.** You can access and submit the required enrollment forms through the Office Ally clearinghouse site.

Note: You do not need to have an existing account with Office Ally in order to access and submit these forms.

Enrolling to receive 835 files for United, Fallon, Tufts, and Boston Medical Center:

1. Go to Office Ally site: <https://cms.officeally.com/Pages/Home.aspx>
2. Hover on *Resource Center* at top of screen and select *Payer EDI Enrollment Forms*
3. Under the text *Payer Enrollment Forms (by State)*, click on link to 'view...835 Enrollment Forms'
4. In the appropriate alphabetical section, find the desired SCO. They are listed as:
  - *UnitedHealthcare Community Plan – DE, FL, HI, LA, MA, MD, NM, OH, PA, WA*
  - *Fallon Community Health*
  - *Tufts Health Plan*
  - *Boston Medical Center (BMC) Healthnet Plan*
5. Fill in the form with your ASAP as the provider. You will likely need your provider Tax ID Number and your NPI. You may additionally need the SCO's *Payer ID* to complete the form:
  - United = **04567**
  - Fallon =
  - Tufts =
  - Boston Medical Center =
6. Follow form instructions for submission.

### b. Register for an account with the claims clearinghouse Office Ally

All accounts should be set up through our Office Ally Account Representative. Her contact information is as follows:

**Felicia Workman**

**Activation Service Department Manager**

Office Ally, Inc.

[felicia.workman@officeally.com](mailto:felicia.workman@officeally.com)

Direct: (360)-975-7000 ext.7463

- State that you are a MA provider participating in the SCO Standardization Billing Project with the State Office of Elder Affairs
- Have your NPI and Tax Identification Number (EIN) ready
- Name & email address of primary contact for your ASAP claims process

When registered you will receive 3 sets of credentials for the Office Ally website. You will need to keep these emails, but you will not often need to login.

- **Office Ally account** credentials – for logging into the Office Ally website
- **Office Ally Security Admin account** credentials – for adding users at your agency
- **Office Ally SFTP account** credentials – needed to transmit and retrieve files to and from Office Ally/SCO

You will rarely if ever need to login directly to the Office Ally website. Your interaction with Office Ally (other than the occasional password reset) will solely be through the exchange of files stored in folders on your network.

- ✚ You will receive an invitation for training when you complete registration. **Decline / ignore this offer.** Office Ally offers extensive added functionality and tools that will not be part of the ASAP-SCO billing process. ASAPs should not alter claim data on the Office Ally site, and always make all data changes only within SAMS.

## II. IT Related Tasks

### a. Download FileZilla (free SFTP application)

The FileZilla client application needs to be downloaded to anyone's computer who will be submitting/retrieving claim files.

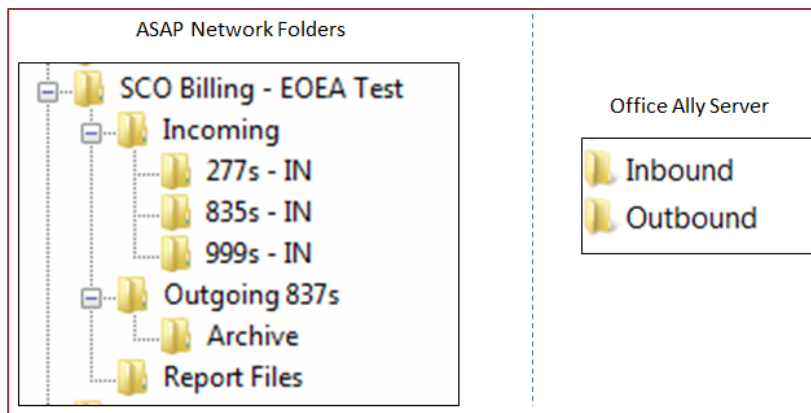
- Go to: <https://filezilla-project.org/>
- Download Client Application



Once a secure connection with the Office Ally server is established (by logging into it with ASAP SFTP credentials), ASAP users will move 837 claim files saved on your network to the Office Ally *inbox*, and retrieve files from the Office Ally *outbox*

### b. Set up outgoing and incoming folder structure on your network

On the left-hand side below is the suggested set up for your network folders related to SCO claims. On the right is a depiction of how the Office Ally folders appear when you are connected to the Office Ally server.



As you can see, there are several different files types that ASAPs retrieve from Office Ally, but only one that ASAPs submit – the 837 file. ASAPs can determine what additional folders may be helpful in their efforts to keep claim files organized.

Note that incoming files from Office Ally will not necessarily have SCO identifying information on them. It is good practice to collect all like files in one folder, regardless of SCO, and use SAMS tools to view and report on claim information once the files have been uploaded.

#### c. Download ZIP file application, if necessary

The person who manages claims submissions at your agency should have access to a ZIP file application, such as 7-ZIP or WINZIP. It will be needed in order to extract certain response files from the Office Ally server.

#### d. Submit request to add Claims role in SAMS

Make sure staff who will be managing claims have the correct SAMS role, requested by your SAMS Access Administrator on the User Request Form. The required role is: **S.1P Claims**.

### III. Program & Internal Process Tasks

#### a. Add services to your ASAP provider contract if necessary

If your ASAP plans to bill SCOs for PCA or AFC services, the appropriate services must be added to your provider contract first. We recommend that ASAPs create a new contract from a copy and add the services.

#### b. Establish process to post deliveries for new services to SAMS

Some ASAPs may not currently track PCA or AFC services in SAMS. In order to claim for these services provided by a SCO, service deliveries must be entered in SAMS under the appropriate SCO program. The SCO programs are configured to allow ASAPs to post deliveries for PCA and

AFC services without the care plan, service plan & service order. They can be entered manually, by using the service delivery wizard, or through Provider Direct.

**c. Establish process & responsible parties for creating and transmitting claims, and retrieving response files**

Each ASAP is staffed differently, so it is important to consider who will be responsible for each task in advance. The same person could conceivably manage the entire process. Here is an outline of basic ASAP tasks related to claims:

Task	Staff Member Responsible
Ensure that service deliveries have been entered in SAMS	
Create claim batch(es) in SAMS	
Transmit claim batch(es) to Office Ally via file transfer	
Retrieve response files from Office Ally and SCO	
Upload response files to SAMS	
Rebill by creating new claim batch	

#### IV. Glossary of Common Terms

File Types	
837	Claim batch file generated in SAMS, based on service deliveries
999	Payer response file – validates format of 837 file
277	Payer response file – validates 837 claim format
835	Payment Remittance Advice issued by Payer

Organization Types – Language used in claim files	
Submitting Provider	ASAP
Billing Provider	ASAP
Rendering Provider	Contracted Service Provider
Payer	SCO

Acronyms	
ERA	Electronic Remittance Advice (aka 835)
EFT	Electronic Funds Transfer
EPS	Electronic Payments & Statements
EDI	Electronic Data Interchange
EOB	Explanation of Benefits

General	
Office Ally	Free claims clearinghouse web service ASAPs will use for all SCO billing
SFTP	Secure File Transfer Protocol – method ASAPs will use to transmit

	claims and retrieve responses for SCO billing
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### Document History

Date	Vol.	Note	By
7/11/17	1	First version created	AG
8/7/17	1.1	Updated to reflect change in instructions for PCA/AFC services provided by SCOs	AG