<u>**ELECTRONIC SUBMIT**</u>

SequelMed allows electronic submission of claims. In order for the claims to move into the electronic submit bucket for submission, a user must first make sure that the Practice (Tax ID) and/or Provider (SS #) is set up for electronic submission, which can be verified by looking within the details of the Practice profile or Provider profile. Both tables will display the list of electronic vendors. Additionally, the plan must be linked to the appropriate electronic insurance.

To submit claims electronically from SequelMed, you must follow the steps accordingly:

1. Select the appropriate vendor from within the electronic submit bucket.
2. Specify any search criteria (if applicable) and hit the Find button. Within the electronic submit window you have the option of searching by:
   - Provider – Short Name of Provider
   - Plan – Short Name of Plan.
   - Transferred Visits
     - Yes – To find only Transfer visits (secondary claims)
     - No – To find only Primary Visits
     - All – To find all visits including transfer visits.
   - Practice – Short Name of Practice.
   - Location – Short Name of Location

3. Select the claims for submission
4. Hit the Submit button
5. SequelMed will create Claims file (837), destination folder is C:\elect\1\[Vendor name], and while SequelMed creates claims file user can view visit count. Please note that each submit batch has unique Control number assigned by SequelMed. This Control number can be found in details of Submit log.
6. After claim file creation SequelMed will handle claims file in following ways depending on   Vendors:

   a. **FTP and BBS :** If submission is via FTP or BBS, SequelMed will transmit claim automatically. User can see progress of claim transmission in Submit Dialogue box. After completion of transmission Print and Exit button will be enabled. This Dialogue box will show no. of accepted and rejected visits. All submission level rejections will be listed with Rejection reasons; user can also print this list. By clicking Exit all submitted visit will be removed from submit bucket and a submit log will be created. Submit log can be found in Batch→ Submit→ Submit Log

   b. **Web Portal:** If submission for selected vendor is via Web portal then SequelMed will not transmit claim file itself. User has to upload file as per selected vendor instructions. After claim file creation Submit dialogue box

will appear. This Dialogue box will show no. of accepted and rejected visits. All submission level rejections will be listed with Rejection reasons; user can also print this list by clinking Print Button. By clicking Exit a new Dialogue box will appear with message: "Have all claims been transmitted successfully?" and Yes, No and Cancel Buttons will be available. At this point user can leave this dialogue box open and Transmit the claim file as per vendor's instructions (destination folder for claim file is C:\elect\1\[Vendor name]). If transmission is successful, click Yes in open dialogue box of SequelMed otherwise click No. By clicking Yes all submitted visit will be removed from submit bucket and a submit log will be created. Submit log can be found in Batch→ Submit→ Submit Log. By clicking NO Submission will be canceled and claims will remain in Submit Bucket.

Required Fields	Hot Keys
• None	• L – Plan • C – Practice • O – Location • B – Submit batch number (if you do not indicate an Batch #, the system will assign one for you) • S – Select all check box • I – Patient Button • W – View Submit Button • V – Visit Detail Button • B – Submit Button • F – Find Button • P – Print Button • H – Help Button • X – Exit Button

Buttons:

Buttons in Electronic Submit Window have following functions for Highlighted claims:

Patient: This button will take you to the patient demographic window of the highlighted/selected claim,

Cancel Submit: If you have resubmitted a claim that is now in the electronic submit bucket, you can remove the claim from the bucket by highlighting the claim and hitting

the Cancel Submit button. SequelMed will automatically refresh the window and remove the claim from the found data.

View Submit: This button will show you an image of the CMS-1500 form that was or will be submitted to the insurance carrier for that DOS. Additionally, this window provides a shortcut to some of the profile tables (i.e. Practice, Location , Provider PIN).

Visit Detail: This button allows you to see the visit detail window. Here you can add/modify information that is sent electronically to the vendor. (i.e. Referring Provider, Date Last Seen)

Submit: Will submit selected claims to electronic vendor.

Set Flag: If you would like to remove a claim from the electronic bucket without having to send it to the vendor, you can highlight the claim and hit the set flag button. This will remove the claim for the bucket and document (time/date stamp) that the claim has been Set Flagged within the Charge History.

Find; The find button will find all of the claims in the submit bucket for the selected vendor and the search criteria, if specified.

Print: The print button will print the found data,

Help: The help button will display the electronic submit chapter of the manual.

Exit: The exit button will close the electronic submit window.