SOP Name:	**Company Claimscape Manual**
Department:	**Billing and Provider Relations**

Version History

| Date	Version	Updated By:
11/16/21	1.0	Solounge Bowen
6/23/22	2.2	Solounge Bowen

Table Of Contents

Accessing Claimscape

Getting Your Login Credentials

a) Signing into Claimscape required two sign ins,Amazon AWS and Claimscape. It is recommended that you use the same password for both to avoid confusion.
b) In order to get credentials to login to the Amazon AppStream, you'd have to email Vendor Email
c) To get login credentials for the actual ClaimScape application, you can contact Solounge Bowen
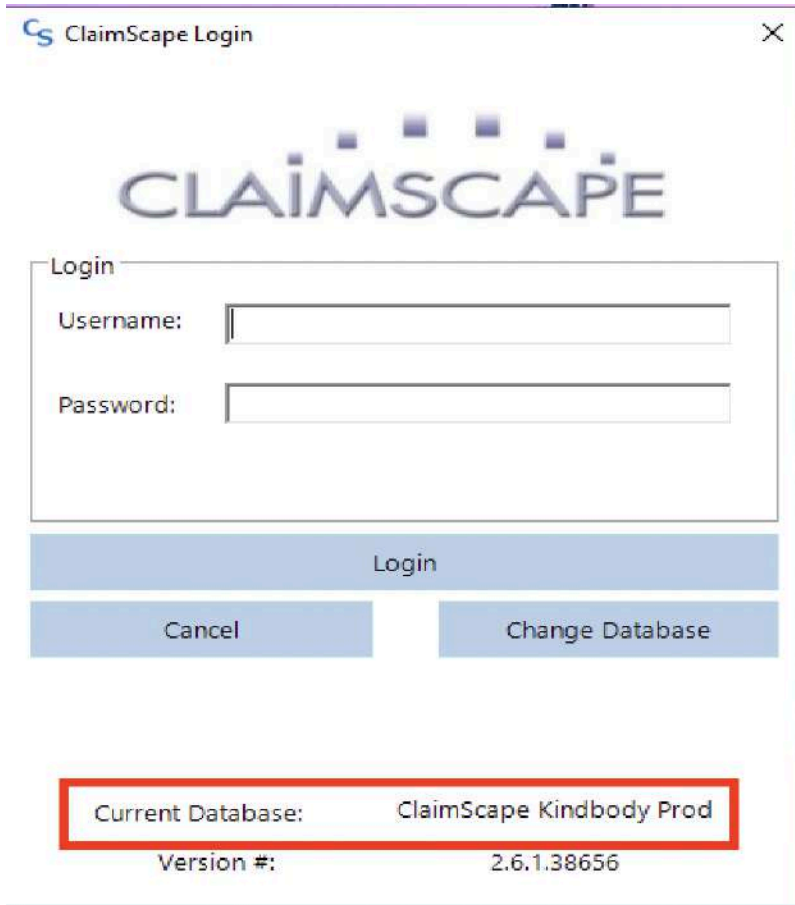
Logging In

a) To log into Claimscape you'd have to sign into the Amazon App Stream first. Here is the following link.

    i) Then, selected the CS Prod logo
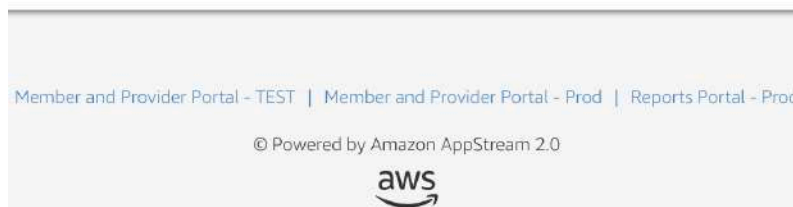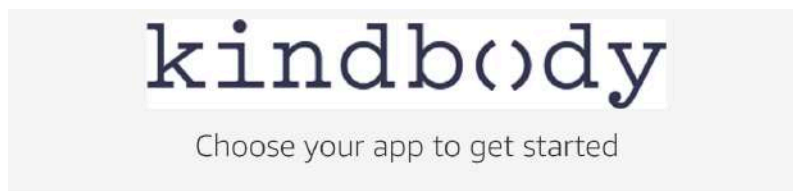
    ii) Once this loads, you will have to log in to ClaimScape.

        1) This is a separate login from the original one you used.

        2) Unfortunately, 1password does not work with this, and you can't use it within the site to put in your credentials.

    iii) Once you put in your login, you will have to do a 2 factor authentication every time you log in.

Switch From Test And Prod Account

1) At the Claimscape Log in Page , the current Account that you're in will appear.

2) Click onto "Change Database" and a window with appear that allows you to choose which database you want.
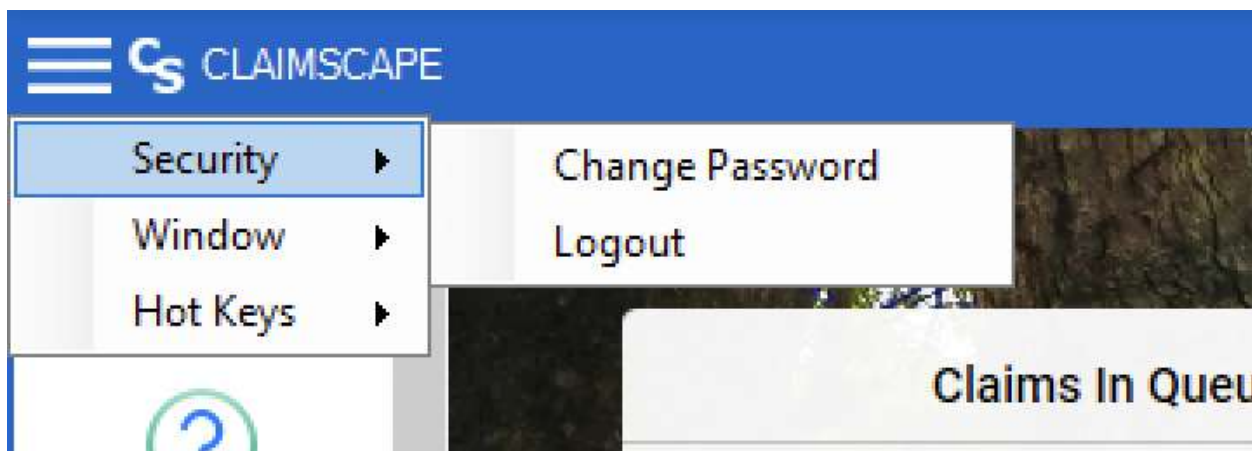
Changing your Password

1. At the Claimscape Home Page on the top left corner should show 3 dashes
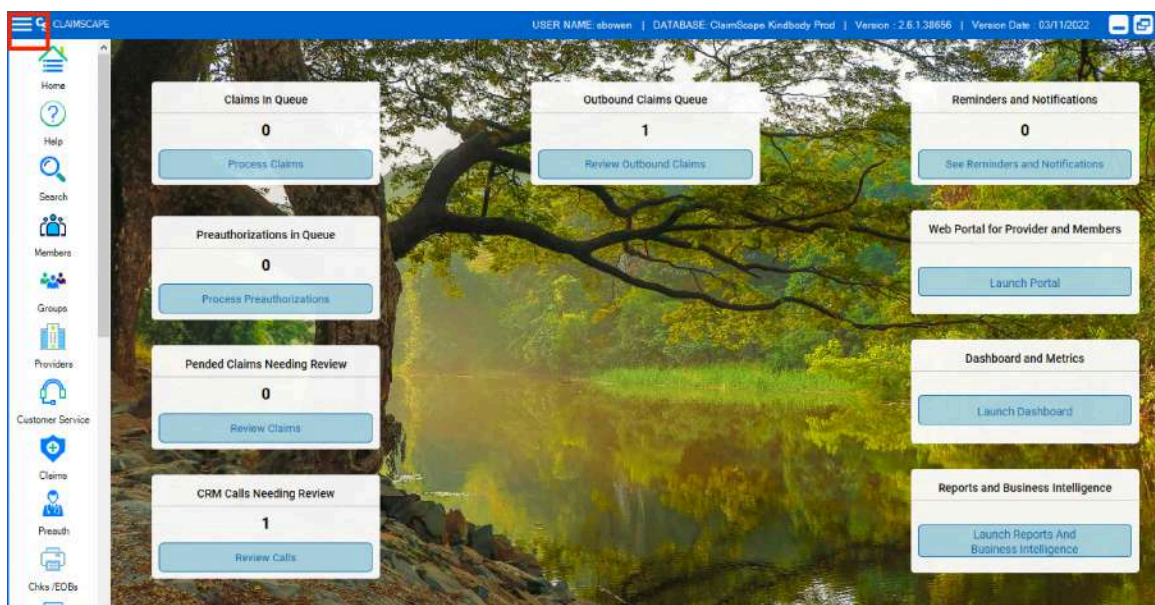
2. If you hover over the dashes and Security, you will see the option to change password

Employer Group Accounts

How To Add A Provider

1) Click "Add" at the top of the window
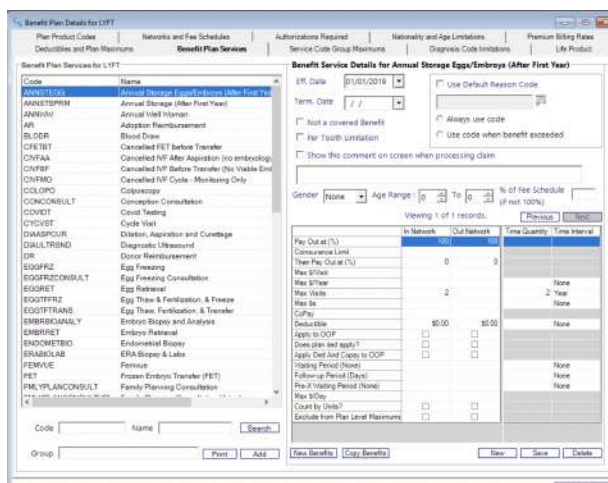
2) After entering the desired information click Save.
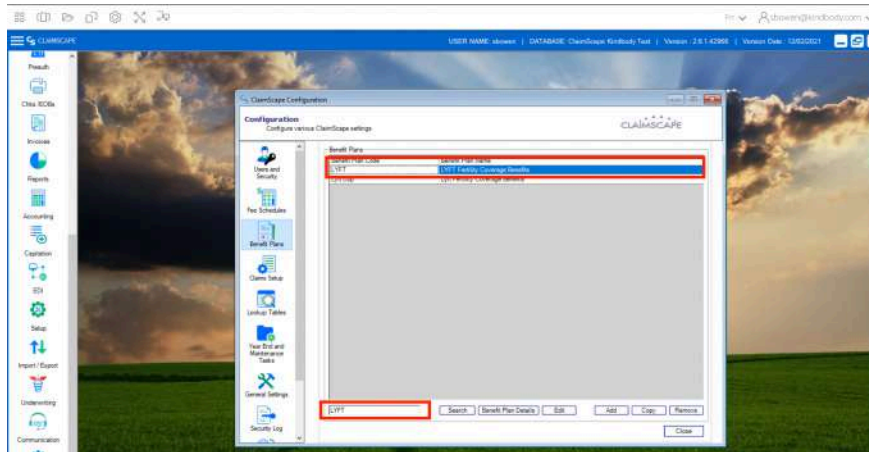

Add Service Group

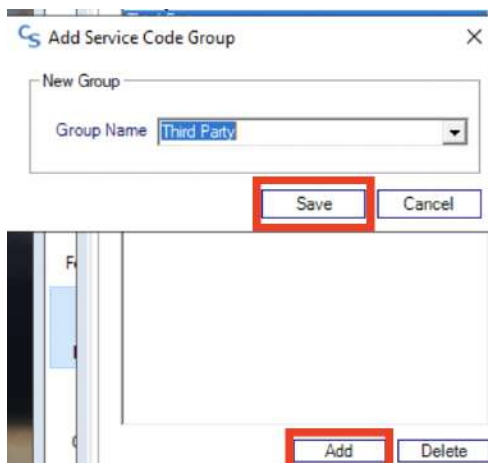1) Click Setup on the main menu toolbar, choose the Benefit Plans tab.

2) Search your desired employer and double click to open it's profile

3) Click the Service Code Group Maximums tab at the top of the menu

4) Click the Add button and choose the desired service group. Remember to click the Save button!

Add Service Limitations/Restrictions

a) <u>**Scenario 1: Separate limit for adoption and a separate limit for donor/surrogacy services**</u>

1) Click Setup on the main menu toolbar, choose the Benefit Plans tab.

2) Search your desired employer and double click to open it's profile

3) Click the Service Code Group Maximums tab at the top of the menu

4) Enter the dollar amount in the "Max Lifetime Payment field for the Third Party Service Group and click Save

5) Click onto the Benefit Plan Services

6) Choose the Adoption Service Code and once you click it a menu on the right side should appear

7) If you have certain notes that need to be shown when processing the claim, click the checkbox to enable that comment

8) Enter the dollar amount in the " Max $s" field and click the drop-down under the time interval to choose the desired interval.

	In Network	Out Network	Time Quantity	Time Interval
Pay Out at (%)	100	100		
Coinsurance Limit				
Then Pay Out at (%)	0	0		
Max $/Visit				
Max $/Year				None
Max Visits				None
Max $s	$10,000.00		1	Lifetime
CoPay				
Deductible	$0.00	$0.00		None
Apply to OOP	☐	☐		
Does plan ded apply?	☐	☐		
Apply Ded And Copay to OOP	☐	☐		
Waiting Period (Days)				None
Follow-up Period (Days)				None
Pre-X Waiting Period (Days)				None
Max $/Day				
Count by Units?	☐	☐		
Exclude from Plan Level Maximums	☑	☐		

New Benefits | Copy Benefits   New | Save | Delete

9) Click the In Network checkbox within the "Exclude from Plan Level Maximum field and click Save

	In Network	Out Network	Time Quantity	Time Interval
Pay Out at (%)	100	100		
Coinsurance Limit				
Then Pay Out at (%)	0	0		
Max $/Visit				
Max $/Year				None
Max Visits				None
Max $s	$10,000.00		1	Lifetime
CoPay				
Deductible	$0.00	$0.00		None
Apply to OOP	☐	☐		
Does plan ded apply?	☐	☐		
Apply Ded And Copay to OOP	☐	☐		
Waiting Period (Days)				None
Follow-up Period (Days)				None
Pre-X Waiting Period (Days)				None
Max $/Day				
Count by Units?	☐	☐		
Exclude from Plan Level Maximums	☑	☐		

New Benefits | Copy Benefits   New | Save | Delete

Scenario 2: Combined lifetime maximum that includes fertility, RX, and donor, surrogacy, and adoption

1) Follow the first two steps of the Scenario 1
2) Click the Deductibles and Plan Maximums tab

Plan Product Codes	Networks and Fee Schedules	Authorizations Required	Nationality and Age Limitations	Premium Billing Rates
Deductibles and Plan Maximums	Benefit Plan Services	Service Code Group Maximums	Diagnosis Code limitations	Life Product

3) Enter the dollar amount in the "Lifetime Medical Limit" field and click the Save button

	In Network	Out Network
Individual Medical Deductible Limit		
Family Medical Deductible Limit		
Individual Dental Deductible Limit		
Family Dental Deductible Limit		
Individual Vision Deductible Limit		
Family Vision Deductible Limit		
Combined Medical/Dental Deductible	☐	☐
Individual OOP Limit		
Family OOP Limit		
Yearly Medical Limit		
4th Qtr Carry Over on Medical Deductible	☐	☐
Dental Yearly Limit		
Plan Year Deductibles?	☐	☐
Vision Limit		
Ortho Limit		
Family Ortho		
Ortho Lifetime		
Lifetime Medical Limit	$75000	

1 of 1 deductibles on record. ☑ Accum. In to Out Net.   ☑ Accum. Out to In Net

[Previous] [Next]   [Delete] [New] [Save]

Scenario 3: Combined annual maximum that includes fertility, RX, Holistic Health, donor, surrogacy but excludes adoption

1) Follow the first three steps of Scenario 2
2) Click the "Benefit Plan Services" tab

Plan Product Codes	Networks and Fee Schedules	Authorizations Required	Nationality and Age Limitations	Premium Billing Rates
Deductibles and Plan Maximums	**Benefit Plan Services**	Service Code Group Maximums	Diagnosis Code limitations	Life Product

3) Type Adoption in the search field and click to open it's detail menu

4) Click the "In Network" checkbox within the "Exclude from Plan Level Maximum field and click Save

Assign Fee Schedule

1) Follow the first two steps of the Scenario 1
2) Click the Networks and Fee Schedules tab

3) Click the "Add" Button

4) Fill in the blank field and click the "Save" once complete

Add/Edit/Delete Carrier Status

1) <u>Click Setup on the main menu toolbar to open the Claimscape Configuration window</u>
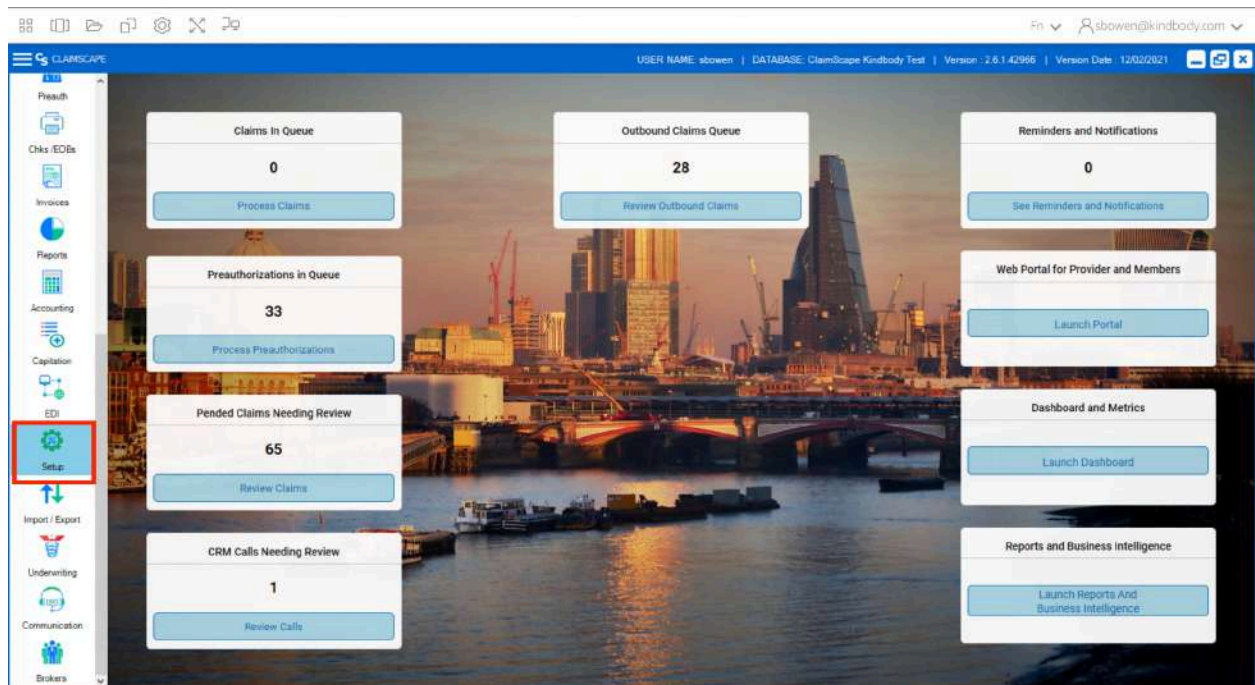
2) Click Lookup Tables button to show all of the uploaded tables, search for "Carriers/MGUs Table"
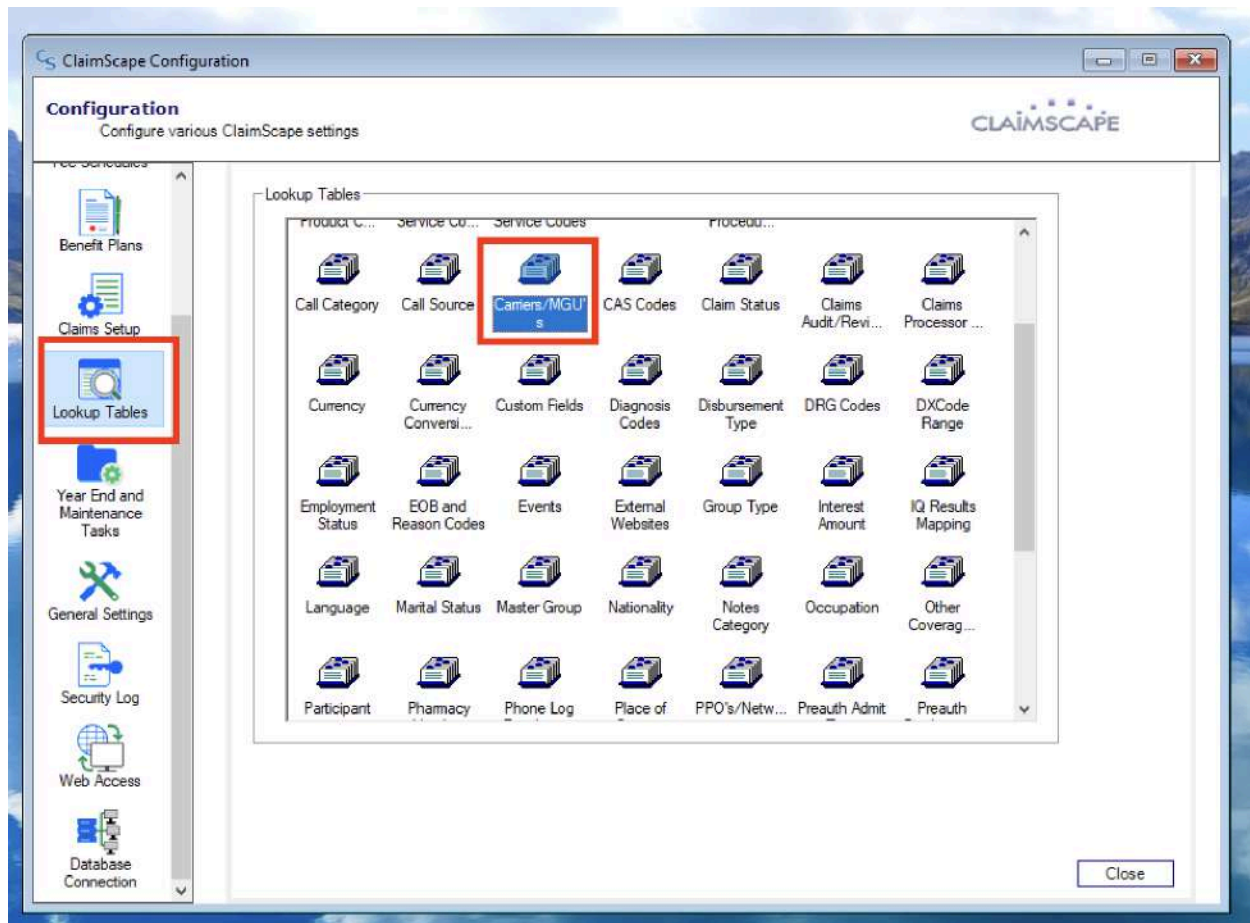
3) Open the table and it will show the list of current carriers. Click the Add, Edit, or Delete button for your desired action

Set Billing Status

4) Click Group button on the main menu toolbar to search for desired group

5) Click on Additional Detail

6) Check in the correct categories for employer invoice and for the 837 and click Save

Data Validation in Claims Review Queue

1) Click EDI on the main menu toolbar followed by the EDI Claims Review Queue button

2) Once you click on the desired claim you can review it and Release for Process

3) Click EDI on the main menu toolbar followed by the EDI Claims Review Queue button

4) Once you click on the desired claim you can review it and Release for Process

Build a Procedure Code into the Fee Schedule

1) Click setup

2) Click Fee Schedules
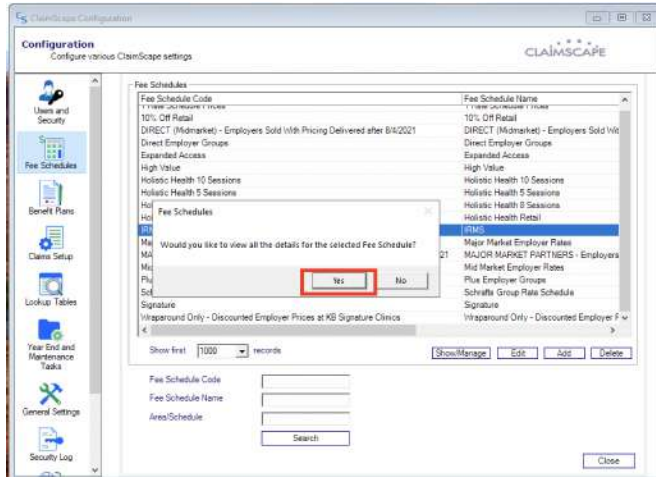
3) Search for the desired fee schedule and click on the a name,click Show/Manage to view the list of codes
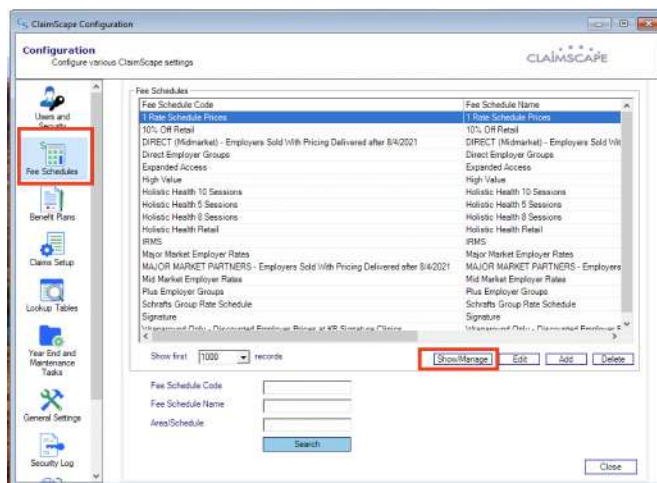
4) Here you can add, edit, or delete a desired code
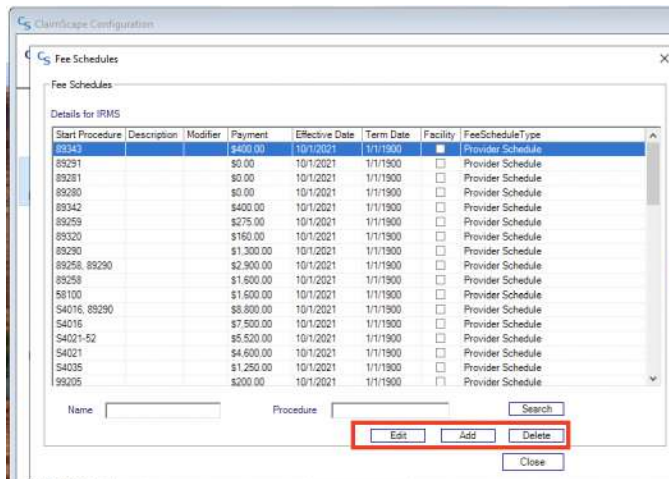
Upload Documents onto ClaimScape from your Local Computer

1) Click on the folder icon at the top of the screen
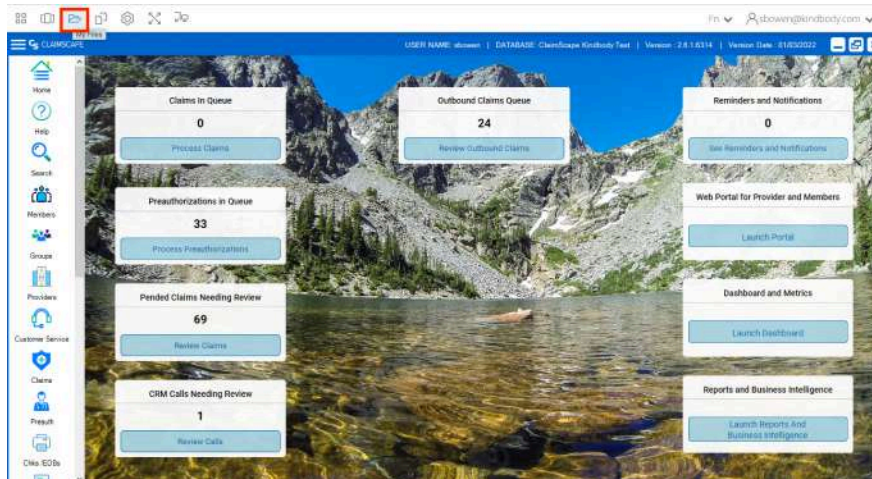
2) Select Home Folder
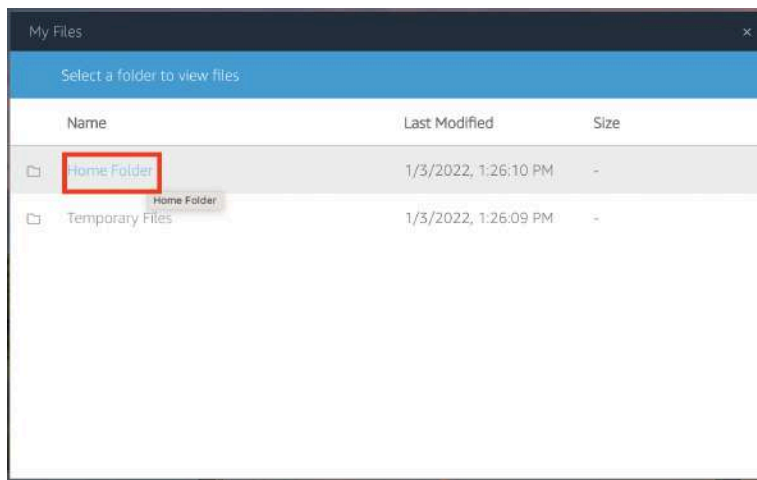
3) Click Upload File and choose the desired document you wish to upload
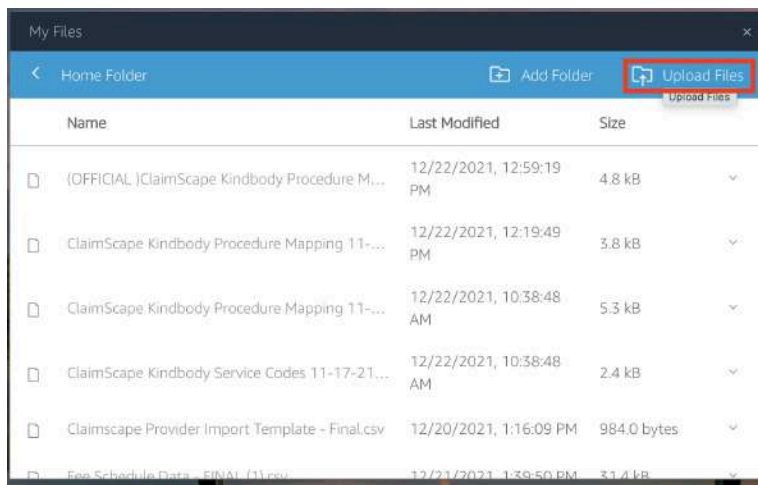
Patients/ Members

Perform Eligibility Check

1) Use Search function on left menu to look up patient
2) On Member Profile Screen, under Member Options, the Eligibility Status will be displayed
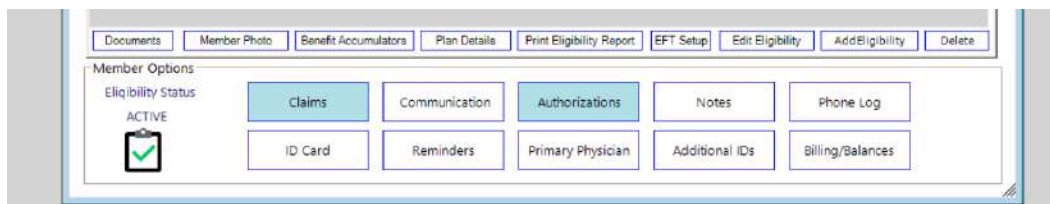
3) What to do when you can't find a patient in ClaimScape
   a) TBD - Annie Tran to provide
4) Check Patient Out of Pocket with Major Medical Insurance Plan
   a) For go-live, staff will not use Claimscape to check out of pocket max/accumulators with major medical insurance plans.

Check Patient Out Of Pocket With Major Medical Insurance Plan

1. For go-live, staff will not use Claimscape to check out of pocket max/accumulators with major medical insurance plans.

How To View Dependent's Profile

    i)   Click Member on the main menu toolbar and search the desired member and click on the patients, the Primary member's profile will appear. Click on the Dependents tab

    ii)   The Profile of the Dependent should appear along with their eligibility status

Record Patient Responsibility Payment

1) Find Member Profile (use Search or Members function on menu).
2) When member profile screen is open, select "Billing/Balances"

3) On the Member Balances and Billing Screen, select "Collect Credit Card Payment
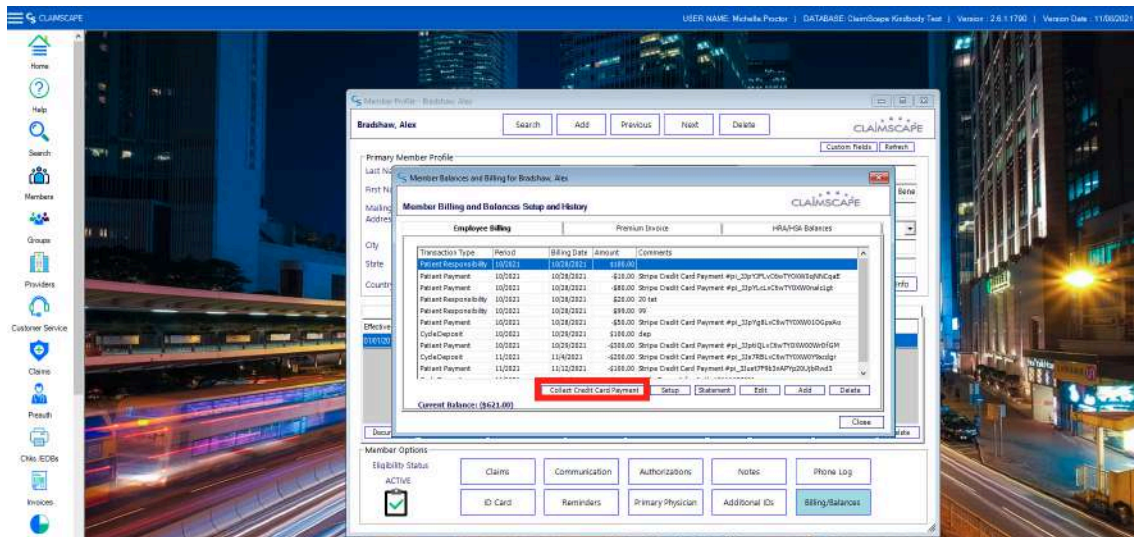
4) On Payment Details Screen, Enter Transaction type, amount and payment details
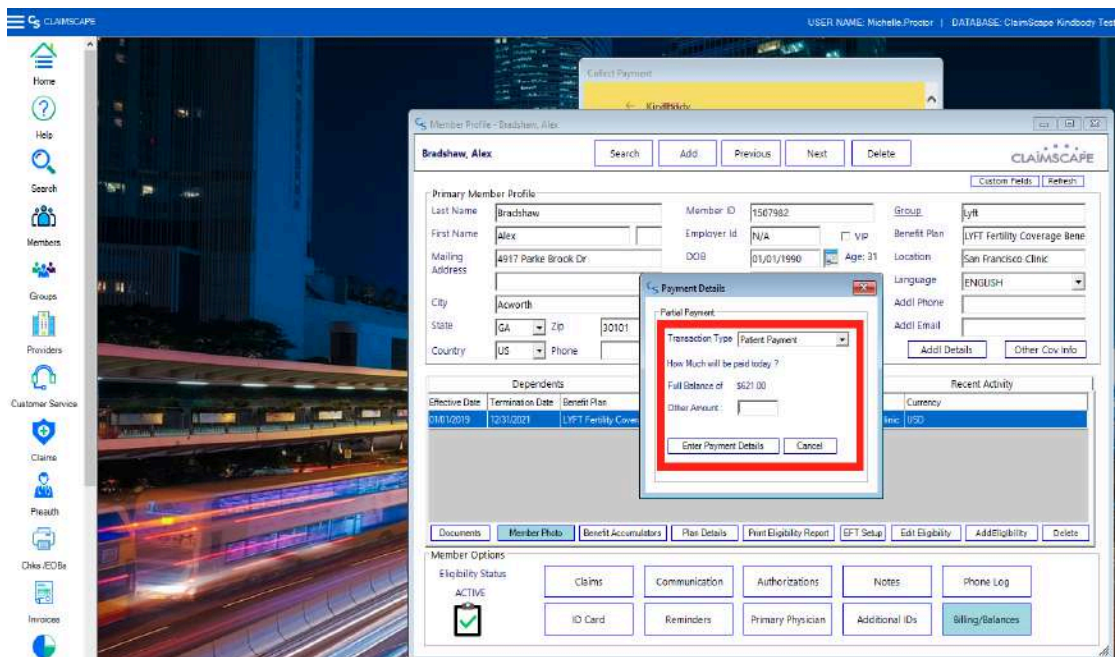
Printing A Member's EOB

1) Click Search button on the main menu tool bar and click Members to search for the member

2) Click the Claims button, and choose the desired claim

3) Once you open the claim, click the Quick EOB button to view the document

4) Click the Printer Icon to print the Member's EOB

Check Benefit Utilization Status

1) Click Search button on the main menu tool bar and click Members to search for the member

2) Click the Benefit Accumulator button, and choose the desired claim

3) Click the Kindbody Benefit Usage button

Preauthorizations

Add New Preauth

1) Click Preauth button on main menu tool bar and select Add New Pre-Authorization and it should open up a request screen
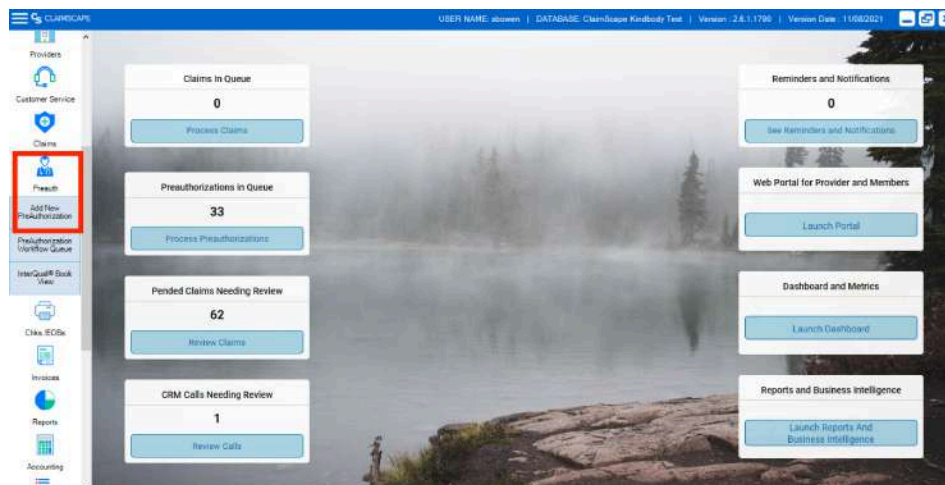
2) Select the magnifying glass icon to search for the member
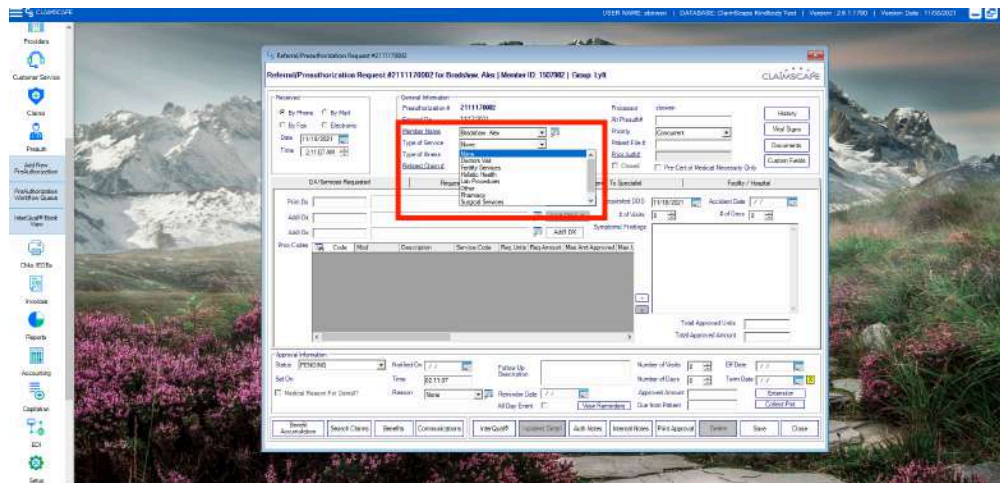
3) Once you've chosen the member's name, you can choose the Type of Service and Illness from the dropdown selections

4) Select "Referred to Specialist" to insert the Service Provider. Select the Find button and enter the correct location

5) Select "DX/ Services Requested" and enter the Primary Diagnostic code in the "Prim Dx" field
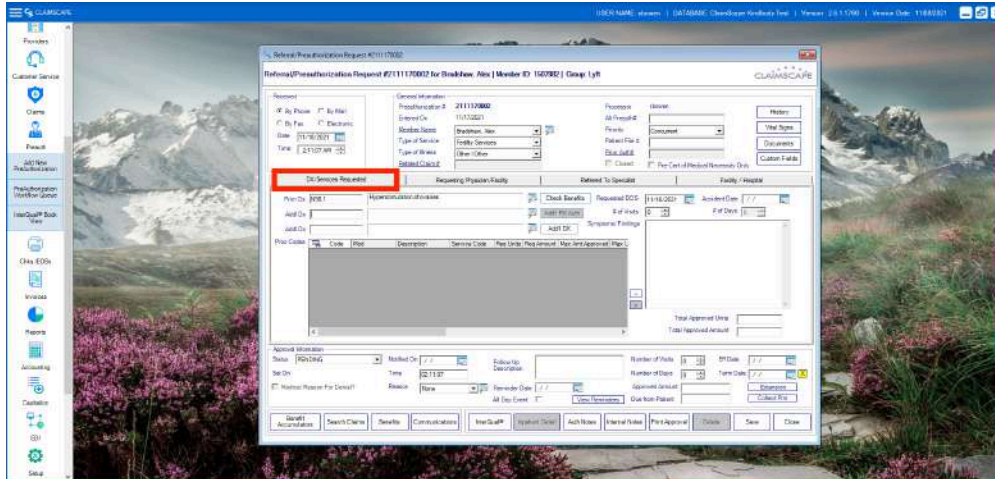
6) Next you'll select the + button to add the procedure code
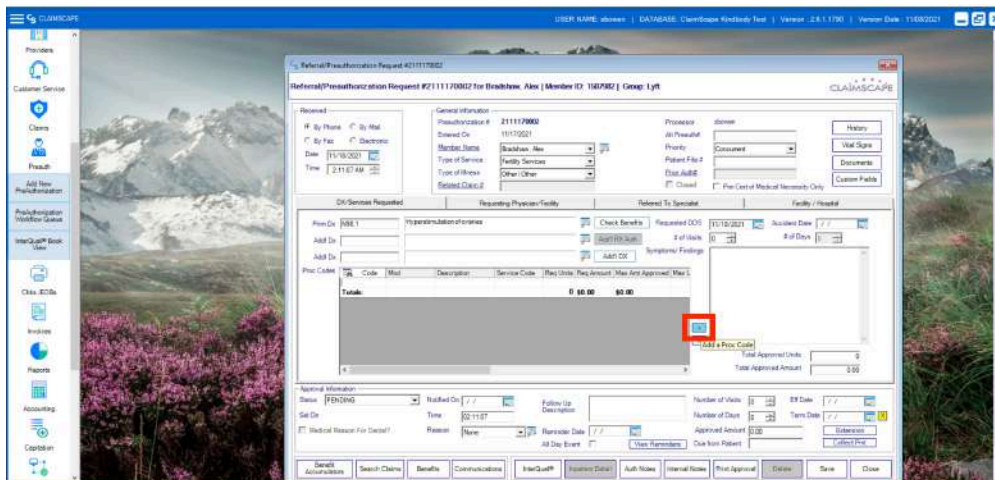
7) Add your service code under the "Code" field and hit Enter on your keyboard and select the Check Benefit button to check the Benefit Limit for Pre-auth.
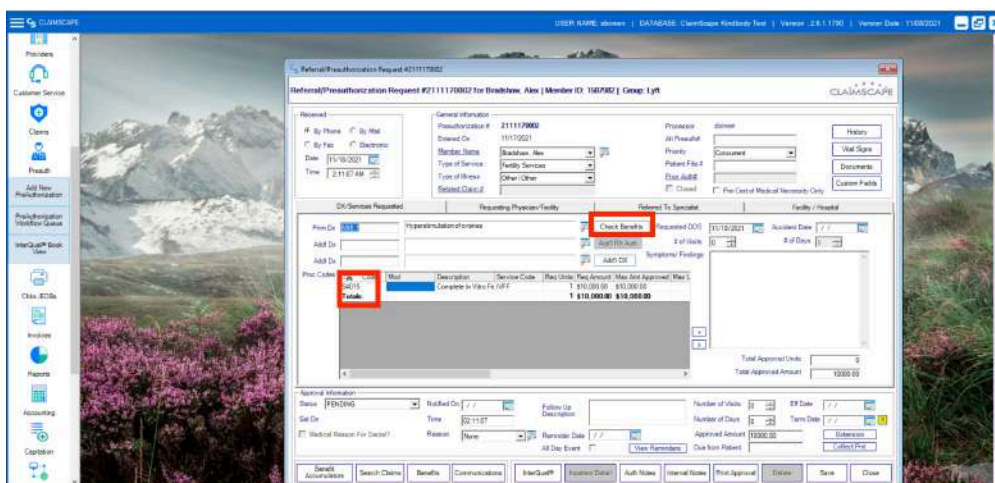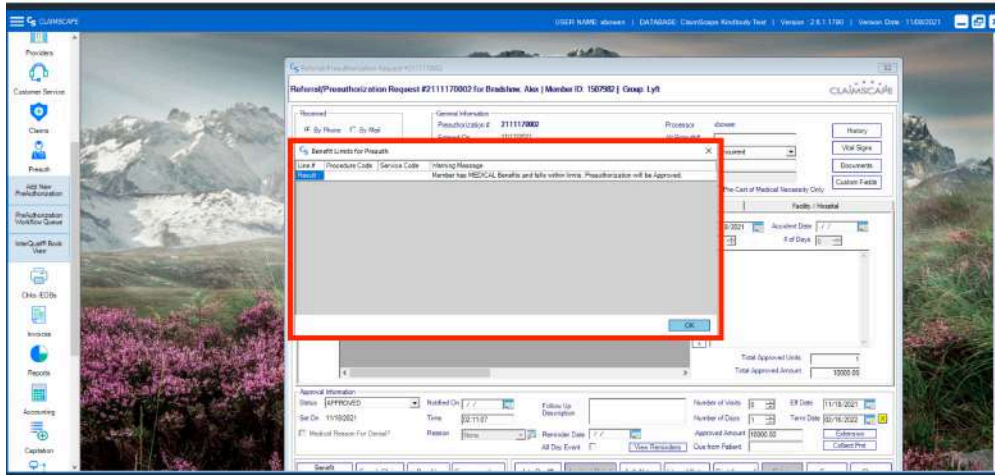
8) Save the authorization.
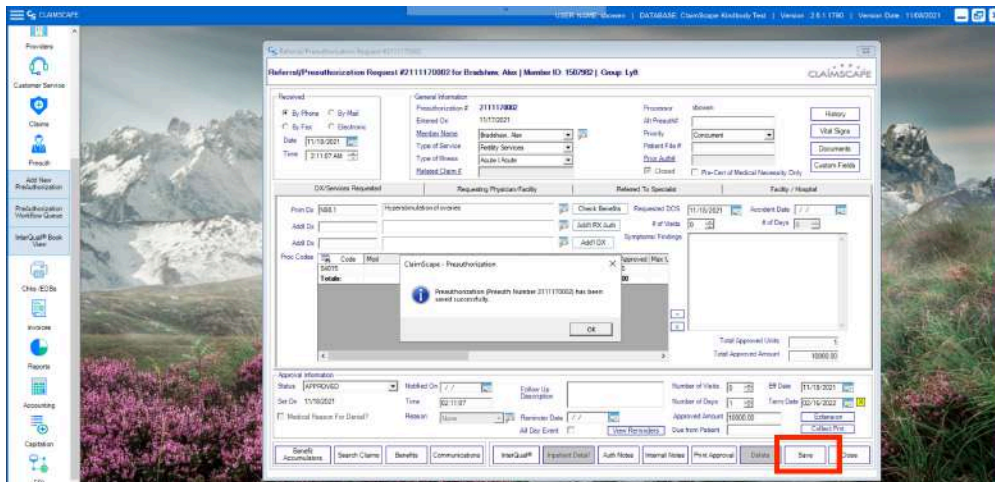
Adding Rx Preauth

1) Complete the same steps as if you are processing a new authorization
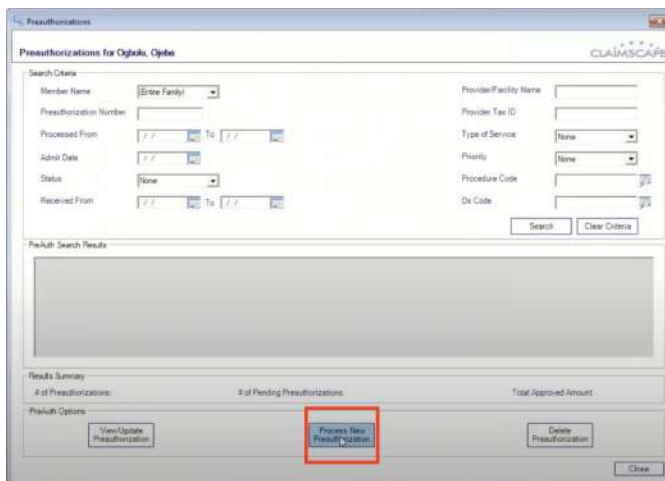
2) Fill in all the required information for the member and then select the Add Rx Auth button to add additional diagnostic codes

REVIEW AND APPROVE A PREAUTH

1) Authorizations can be updated until the claim is submitted. First you can select Search in the main menu toolbar and select Authorizations from the drop down menu.
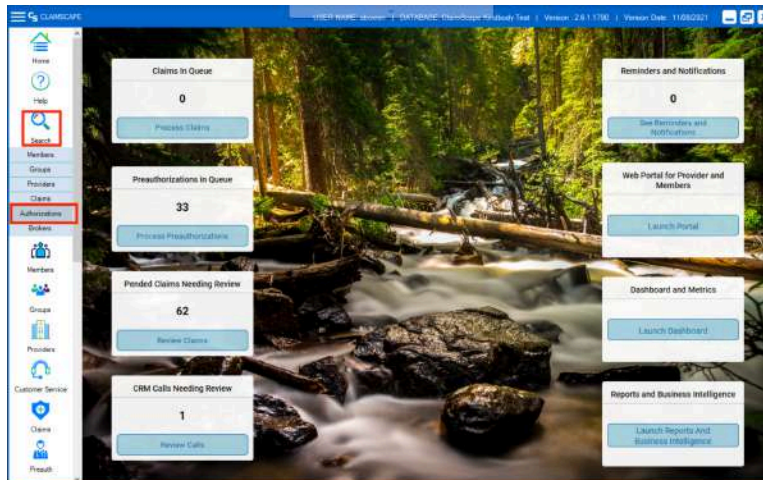
2) Enter the Preauth number of the member into the field and click Search to display the Preauthorization
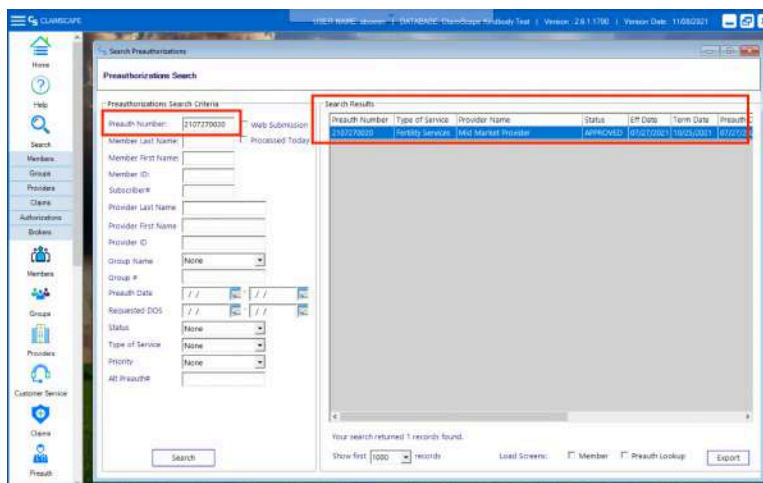
3) Once you click into the authorization you can update or upload information. Click Save once completed

Claims

Manually Submitting A Batch Entry Claim

1) Click Claims Icon on main menu toolbar and select an option from the dropdown selection window and select Add New Claim
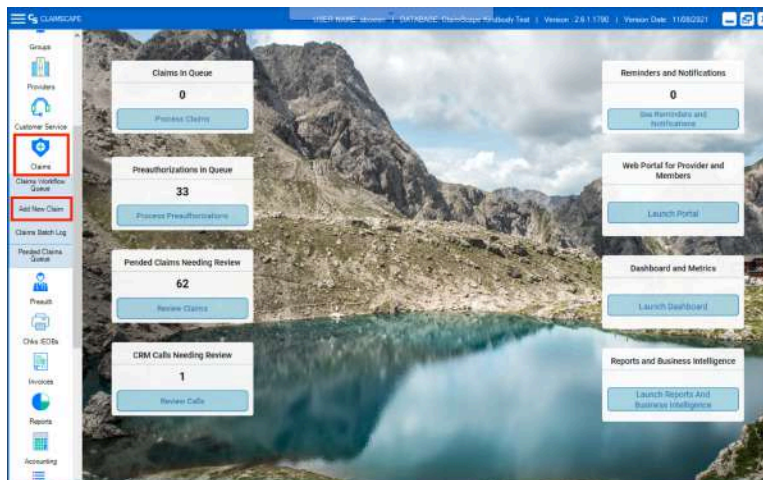
2) Click Batch Entry

3) Enter Claimant ID or Name and Hit Enter or click Search button and enter Search criteria.

4) Click the Magnifying glass for Auth#

5) Click the Entire Family drop-down to select the patient and click search to display the listed Pre-Auth

6) Double click the desired Pre-Auth and click the Yes button to prefill the claim information

7) Enter all claims information.

8) Click Calculate Claim, then click Process and Save.

Adjudicating An Inbound 837 Claim From Sds

1) Select the Process Claims button from the home screen to open the claims in Queue
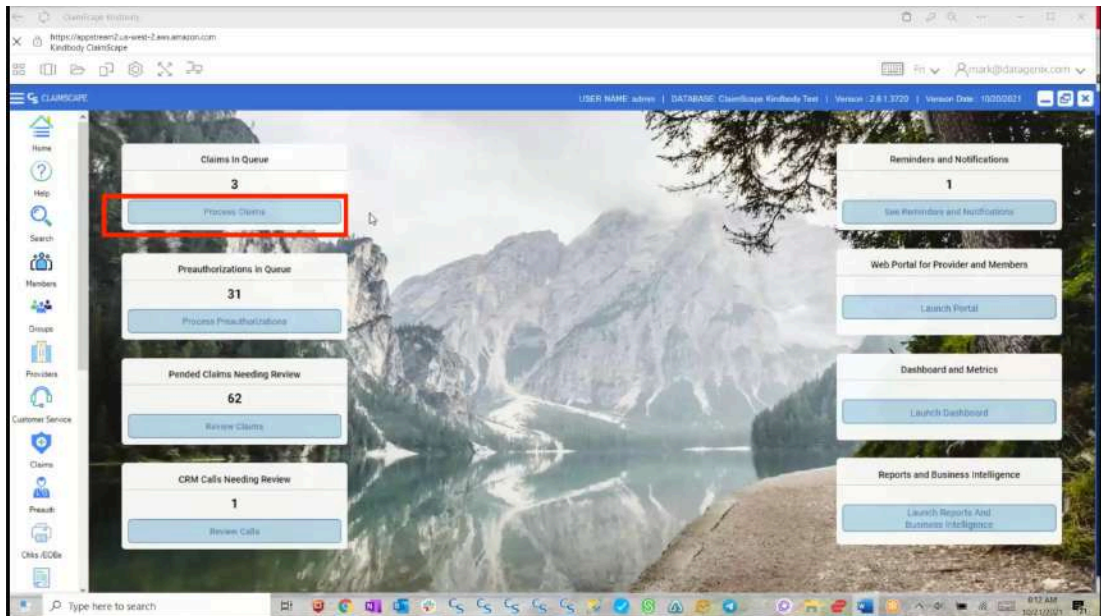
2) Click into the name of the Member name and the Process and Adjudicate Claims window should open
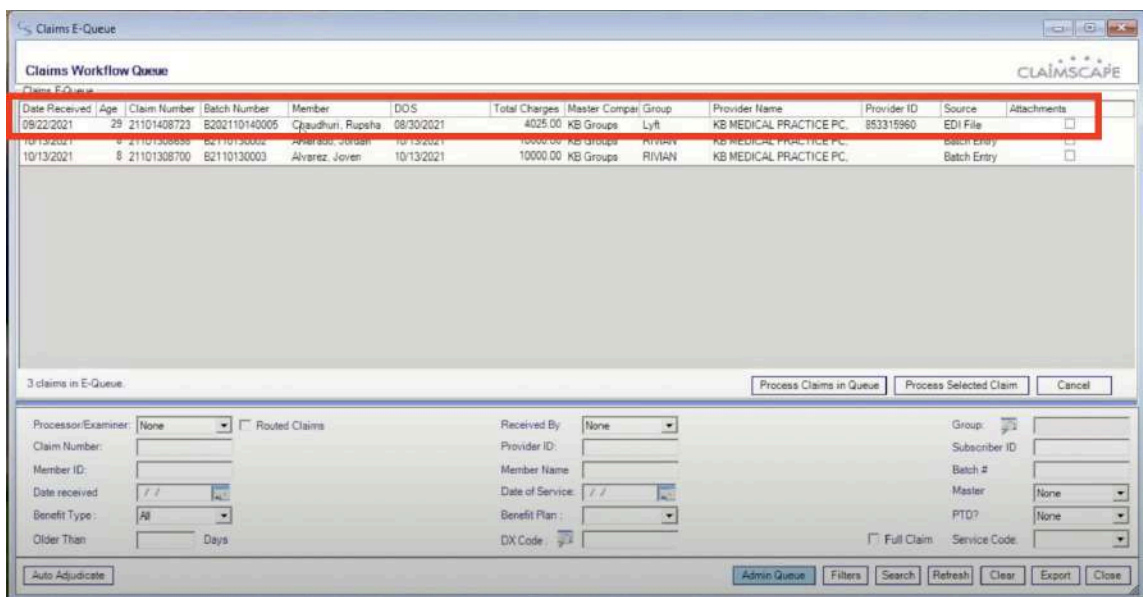
3) Select the Calculate Claims button to adjudicate the claim

4) Select the Process/Save button to save the claim

5) You can confirm the claim processed by using the Search button on the main menu toolbar

Confirming Outbound 837 Has Been Sent To SDS

1) Can confirm by clicking on the submitted claims and check the status says sent via EDI to 837.
2) This can also be confirm by contacting William Stauffer

Adding A Claim While Viewing An Existing Member Screen

1) Click Claims button in Member Options section in lower screen.

2) Click Process New Claim button.

3) Click Collect Payment

4) Enter all claim information and click Process/Save.
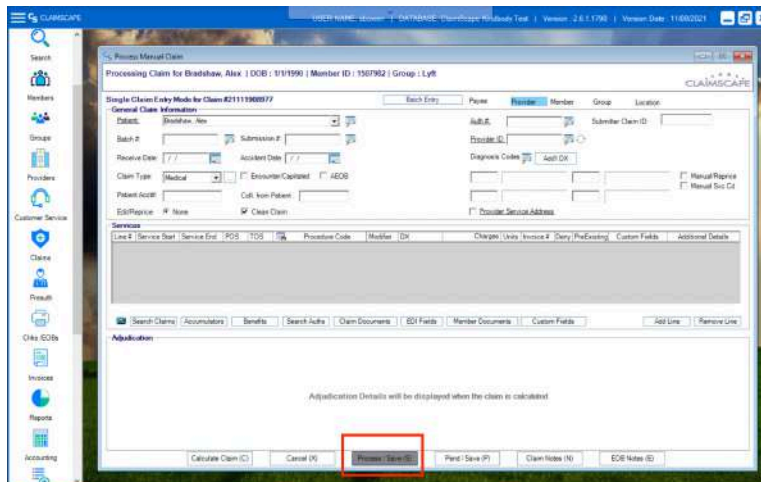
Delete Duplicate Claim Under Same Authorization

1. Click Members and search for the desired patient to open their profile
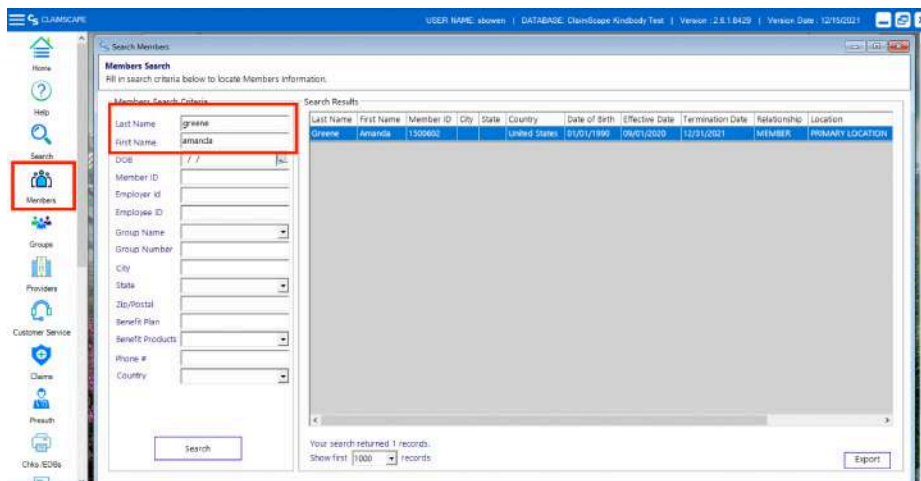
2. Click the Claims button and click Search to pull the patient's claim history

3. Double click on the desired claim that you want to be deleted

4. Click the Delete Claim button followed by Yes to confirm the deletion of the claim

Reports

Generating A Claim Report

1) Click Chk/EOBs button on the main menu toolbar
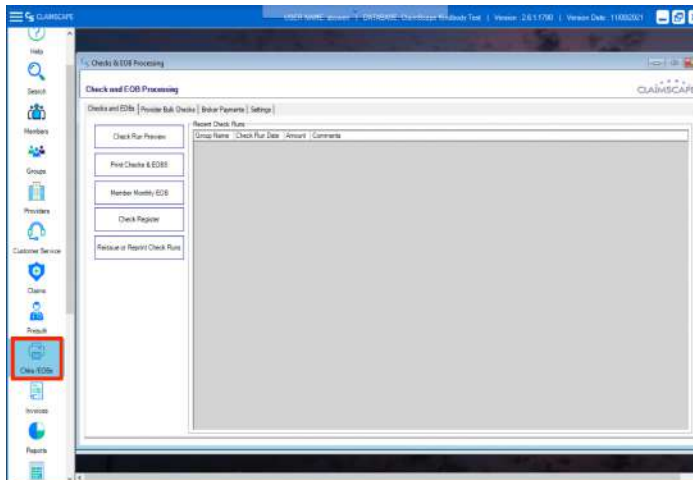
2) Select the Check Run Preview button and the Process Check Window will open. Fill in the Step 1 information and click the Next button
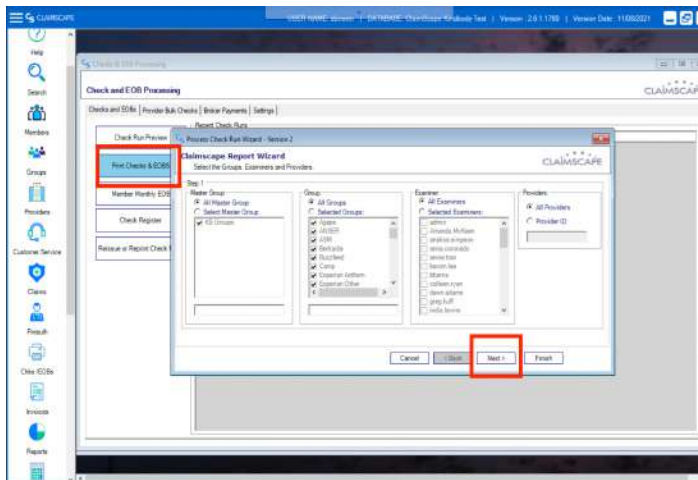
3) Within Step 2, select the date ranges for the claims processed and paid and click the Next button
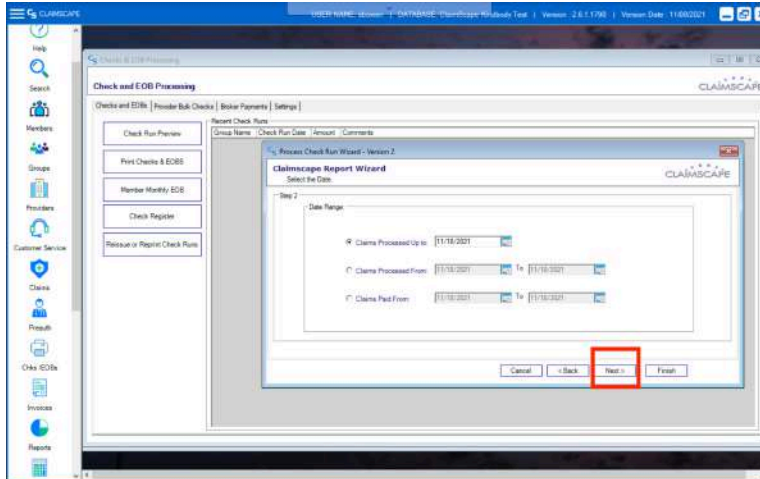
4) In Step 3 , you will filter the Claim Types, Network/PPO, Payee, and Location .
   Click Next button once complete
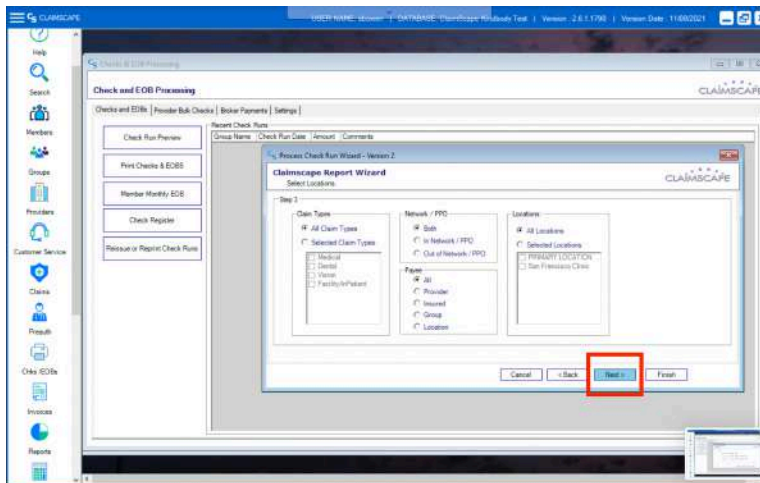
5) In Step 4 you will filter the Reason Codes, Claim Numbers, Group Codes, and
   Batch# . Click Next button once complete
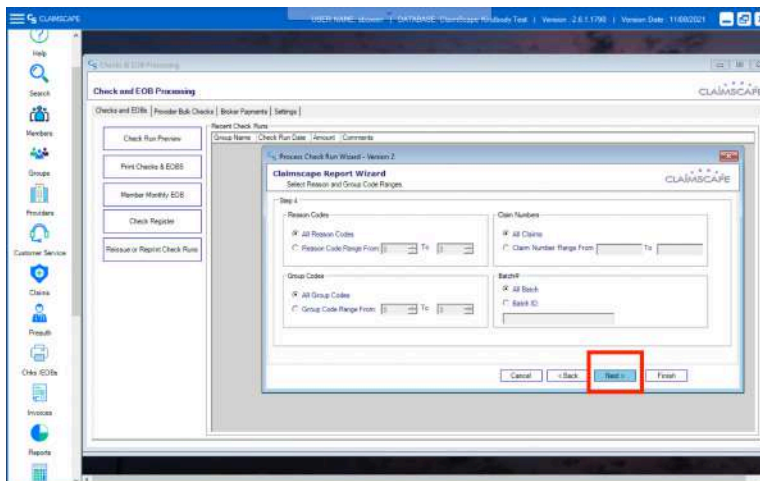
6) Lastly, in Step 5 you will select the type of Output form and Preview the desired file before printing. Click Next button once complete

7) Click the Finish button to get the report

Provider Relations

Imported Documents Used

- [Provider Data File](#)

- [Fee Schedule File](#)

- [Historical Benefit Utilization File](#)

- [Service Code Group Maximum File](#)

Master Import Documents

- [Benefit Plan Overall Maximums](#)

- [Benefit Plan Service Master](#)

- [Master CPT to Service Codes](#)

- [Provider Data File](#)
- [Fee Schedule File](#)

- [Historical Benefit Utilization File](#)

- [Service Code Group Maximum File](#)

Shortcuts

1. Member Communication **(F1)**
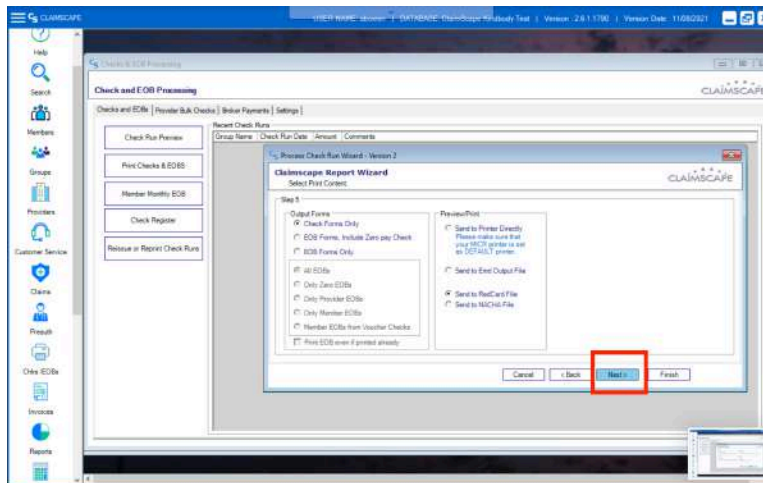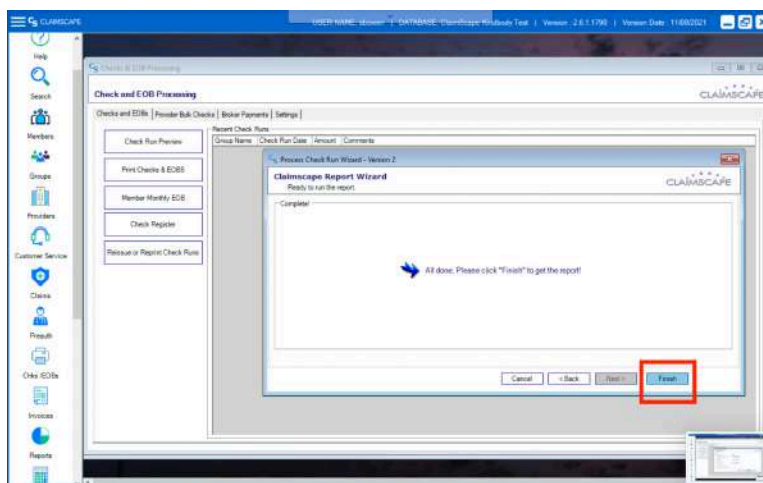2. Member Notes **(F2)**
3. Member Phone Log **(F4)**
4. Current Reminders **(F5)**
5. Add Customer Service Log **(F6)**
6. Database **(F7)**
7. Phone Log Queue **(F8)**

8. E- Claims Queue **(F9)**
9. Preauth Queue **(F10)**
10. Claims Batch Log **(F11)**
11. Fee Calculator **(F12)**
12. Search Members **(Ctrl + M)**
13. Search Groups **(Ctrl + G)**
14. Search Providers **(Ctrl + P)**
15. Search Claims **(Ctrl + K)**
16. Search Authorizations **(Alt + A)**
17. View External Websites **(Ctrl + W)**
18. Add New Claim **(Alt + C)**
19. Add New Preauthorization **(Alt + P)**
20. Copy **(Ctrl +C)**
21. Paste (**Ctrl +V)**