



ClaimShuttle
Quick Reference Guide

Prepared by
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Welcome to ClaimShuttle!

This guide will walk you through how to setup your account for the services you have signed up for with ClaimShuttle.

Your Account

When you first login, the first page you will see is your *Activity Stream* page. The *Activity Stream* page consists of 3 sections.

- The **Top** part is for shortcut buttons that you can use for the services you signed up for
- The **Middle** section displays Notices that we have published for you to read
- The **Bottom** Section shows your Account's activity such as your login and log out events.

Your **Main Menu** will be accessible via the icon on the top left hand side of your screen 

Folders

This applies to those who are signed up for our EDI File Transfer Service

- **Inbox** – This is where you will retrieve your response files from your electronic receivers
- **Outbox** – This is where you will upload your EDI files that are generated by Medicare's PC-Ace Pro software, your EHR software, or Practice Management system so it can be transmitted to your electronic receiver
- **Sent** – This is where copies of files that you have transmitted are saved

Tasks

This is where the services you have signed up for can be accessed.

(Note: You will only see the options for the services you signed up for. Eligibility and 3270 will appear after you have applied the appropriate roles to your user account. See pages 2-3 for editing users and roles)

- **Send Claims** – This is a shortcut link that you can click on to upload files to your Outbox for EDI File Transfers
- **Check Eligibility** – This will take you to the Eligibility Inquiry screen so you can access the CMS HETS system and retrieve eligibility information for your Medicare Patients.
 - **Eligibility Manager** – This is where your past inquiries are stored for easy access
- **3270 Access** – This will take you to the screen where you can launch our 3270 EDC Emulator so that you can reach the FISS/DDE screens. (Note: The screen that appears once you login to 3270 is driven by the access selection you made when you applied for a User ID and Password for 3270)
- **Claim Data Entry Java App** – For those who purchased our Claim Data Entry software, SolAce, click on this link download our SolAce Billing Software onto your PC. (Note: Java 8 is required)
 - The SolAce Billing Software allows users who do not have software that can create EDI files to: enter claims, scrub claims for common errors, and submit claims to their

electronic receivers from the software. It also enables users to view all of their response reports in a user friendly readable format and allows users to match payments to claims billed and view complete tracking of events for all claims billed. Through SolAce, users can not only bill to Medicare, but also to Blue Cross Blue Shield, Medicaid, and Commercial Payers when combined with one of our supported Clearinghouses!

Reports

- **Activity Stream** – This is where you will see all of your account’s activities

Setup

- **Organization**- This is where you can view your Organization’s account information (i.e. your demographic information, contact information , and subscriptions)
- **Security** – This is where you will see your list of Users and their access rights also known as “roles”
- **Folders** - This is where you can see your folder’s properties (i.e. Inbox, Outbox, Sent, or any custom folders you create)
- **Workflows** – This is for advanced users who want to set up custom workflows on how files should be handled prior to being sent or stored. Please do not make changes to this section w/out the help of our support representatives.
- **Mailboxes** – This is where you choose the electronic receivers you want to send files to and configure your connection settings using your payer assigned Submitter ID, Logon Id, and Password.
- **Providers** – This is where you would set up your Provider’s information in order to send Eligibility Inquiries to the HETS system.

Help

- **User’s Guide** – This is where you can access a copy of the ClaimShuttle User guide
- **Medicare** – This is where you can access some of the Resources we have gathered for the different Medicare Jurisdiction Carriers
- **Go To Meeting** – Click on this link to launch Go To Meeting when requested by one of our support representatives.

Your Users

By default, the Administrator entered at the time of Sign Up via the Sign Up Wizard is set up as the initial user.

Users are assigned **Roles** which determines a user’s access level. As a courtesy, some initial roles have already been created for you to use. They are:

- **Organization Administrator**- Only users given this role have access to add or delete users and roles as well as edit current user’s profiles. (Organization Administrators must also be given the Site Administrator role and other service specific roles in order to use the ClaimShuttle services)
- **Site Administrator** – Users given this role can manage mailbox connections but cannot edit users ,which **can only be accessed** by Organization Administrators
- **Folder Access** – Users with this role can upload, read, and download files from the folders.
- **Eligibility Users** – Users with this role can access the Eligibility Inquiry screens

- **Medicare EDC** – Users with this role can download and use the 3270 FISS/DDE emulator
- **Secure FTP Users** – This role is mostly for advanced users who use FTP clients or run scripts to exchange files via an FTP connection. You must have your own programming staff that creates your scripts to automate FTP file exchanges. We do not assist with script creation.
 - You should only use this if you have your own software that translates 999, 277CA, and 835 EDI files
- **Secure WebDAV Users** - This role is mostly for advanced users who want to exchange files via an HTTPS connection. This feature is available but not as stable as the FTP connection. FTP is preferred for accessing ClaimShuttle outside of supported browsers.
 - You should only use this if you have your own software that translates 999, 277CA, and 835 EDI files

Adding Users

Only those who have been given the Organization Administrator role can perform this task.

Remember that users with the Organization Administrator role must also be given the Site Administrator role and other service specific roles in order to use all of the subscribed services; otherwise they will only have access to the Security page.

1. Click on Security under the SETUP section of the main menu.
2. There are 2 tabs on the page. 1 for creating users and 1 for creating roles. Make sure you are on the Users tab.
3. Click on Create a New User (to Edit or Delete a current user’s profile, just click on Edit this User)
4. Enter the User ID you would like to assign to your user and their contact information
 - a. A valid e-mail address is VERY important because from the time you click the “Create User” button, your user will have **1 hour** to get to the email the system sends which will give them their Logon ID and a link that they need to click on to set up their own password.
5. Make sure the “Send account information to the user” box is checked and click on the Create User button.
6. Click on the Alter Security roles button at the top of the screen
7. From the list of roles provided, click on the Add this Security Role button(s) to assign roles to your user.
 - a. You may assign more than one role to each user if necessary
 - i. For example: If a user will be sending files and reading inbox reports, you should give that user the Folder Access role. If the user will also be needing access to the Eligibility Inquiry screen, you will also need to assign that user the Eligibility Users role.
 - b. To remove a role from a user, simply click the Remove this Security Role button.
 - c. Two-Step Verification is turned on by default. You may disable it if you would like.
8. Your user will receive an email from support@claimshuttle.com as soon as you create their account
 - a. If they did not receive an email, simply return to the Security page, click Edit this user, and click on the Send Invite button
 - i. Please also have them check their SPAM or Junk Mail folders
 - ii. If Two-Step verification is turned on, please make sure your user chooses to receive their code by e-mail.

Claim Shuttle Services

EDI File Transfer

The EDI File Transfer service allows users, who use a third party software to generate their EDI files, to transmit their files directly to an electronic claims receiver like Medicare, Medicaid, Blue Cross Blue Shield or a Clearinghouse.

To ensure you are properly set up to start using the EDI File Transfer service through ClaimShuttle you must make sure you have the following items setup:

- Your Mailbox, which contains the Receiver you need to reach, your Submitter ID, Logon ID and Password assigned to you by the receiver. (See instructions on Setting Up Mailboxes below)
 - This is found in the Mailboxes screen under the SETUP section from the Main Menu.
- Make sure you have a user with the Folder Access role assigned so they can access the Outbox (where files are uploaded for transmission), the Inbox (where response files from your receivers are found), and the Sent folder (where a copy of files you have transmitted are stored).
- If you are using FTP or WebDav, make sure that your Inbox, Outbox, and Sent folder's properties have the Read, Write and Delete permissions enabled for the Secure FTP and Web Dave roles.
 - This can be found in the Folders screen under the SETUP section.
 - For Example: If you will be using Secure FTP to upload files to the Outbox and download reports from your Inbox, you must click on the Properties link for Outbox and Inbox and check the Read, Write, and Delete boxes for the Secure FTP Role.

Setting Up Mailboxes

Your logon information for your selected receiver's systems is stored in what we call "Mailboxes".

To set up your mailboxes for EDI File Transfers, do the following:

1. Click on Mailboxes under the SETUP section from the menu
2. Click on Add a Mailbox
3. Choose the Receiver of your claims from our Receivers list by clicking on the Select button or the Receivers Logo
4. Enter your Submitter Id (this was assigned to you by your receiver)
 - a. Choose Production or Test mode (your receiver should have told you if your Submitter ID is in Test or Production status)
 - i. If you are told that your Submitter Id is in the Test status you will need to send 1 test file to your payer and wait for it to be accepted on a 999 and 277CA report before you can change your mode to Production. (Note: some payers require that you contact their EDI department first to request production status before switching your mode to Production and sending Production files)
 - ii. Test files have a "T" in the EDI file's ISA15 and Production files have a "P" in the ISA15. (this should be discussed with your billing software vendor)
 - b. If you will be sending and receiving files, the Status should be "Active (In/Out)"

- i. If you will ONLY be receiving EOBs through this mailbox, then the status should be “ Inbound Only”
- c. Enter your contact information
- d. The Receiver box should already be filled in for you
- e. The connector should already be selected for you
 - i. *Exception:* For the NGS Receiver
 - 1. Medicare Part A or Part B submitters, must use the 5010 M2 connector
 - 2. DME submitters must use the DME connector
- f. The Sender ID and Sender Code boxes should already be filled in for you
- g. X12 EDI format should be X12-5010
- h. Enter the Logon ID and Password that was assigned to you by your Receiver for file transmission
 - i. This is NOT your claimshuttle.com login and password
 - ii. If you are not sure what your file transmission Logon ID and Password should be, contact your receiver’s EDI department and have them verify what your Logon ID and Password is
 - 1. If you are given a “temporary” password, enter that temporary password in the password box. Our system will automatically change it for you to a permanent password after it sends your first file.
- i. Click the Save button
- j. Click the Test Connection button to see if your Logon ID and Password works
 - i. If you want to verify the password you entered, you may click on the Reveal button.

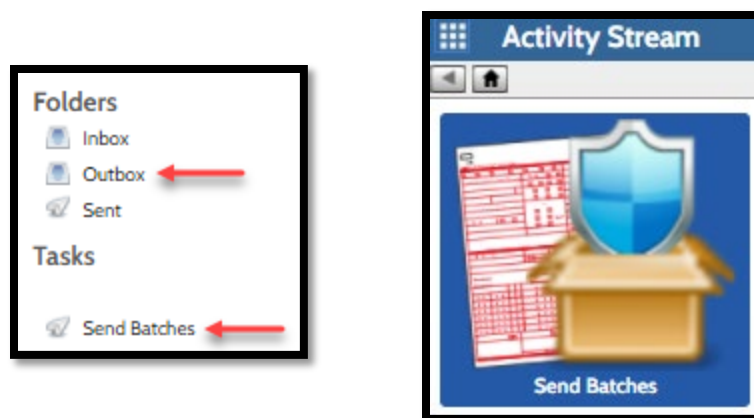
Note: If the receiver requires your password to be changed every 60 or 90 days and their system supports automated password updates, our system will take care of changing that for you automatically. Otherwise, please be prepared to return to this screen to keep your password updated after you change it on your receiver’s website outside of Claimshuttle. If our system does update your password automatically and you want to check what the new password is, just go to Mailboxes, click on the mailbox’s Edit button (pencil icon) and click on the Reveal button next to the Password box.

Advanced Users – If you set up subfolders in your Inbox so that Inbound files from your mailboxes go into specific Inbound folders, click on the “-” symbol for Advanced Settings and designate which sub folder in your Inbox you want Inbound files to go to once received. This would be the drop down box next to “On file received, copy to folder”. Click Save to save your changes.

Sending Your EDI files

Files that you need to transmit through one or more of your mailboxes must be placed in the Outbox. We deliver files through your mailboxes by matching the Sender ID inside your EDI file to a Sender ID in one of your mailboxes.

There are multiple ways to upload a file to your Outbox. You can either click on the “Send Batches” button on your home screen once you login, click on Send Batches under the TASKS section or click directly on the Outbox folder then Upload under the FOLDERS section



1. Choose one of the sending options above
2. Click on Browse and choose the file you want to upload into your Outbox
 - a. If you chose to click on the Outbox, you will need to find the “Upload” button on the top right hand side of the screen to get to the “Browse” buttons.
 - b. PC ACE Pro Users: Your files are usually named BSTRANS.DAT (for professional claims) or BCTRANS.DAT (for institutional claims)
 - i. If you installed PC ACE Pro to your C: drive you will find your file in the WINPCACE folder in your C: drive
 - c. Stratford Users: Your files usually end in “.trn”
 - i. If you installed Stratford to your C: drive you will find your file in the SSIWIN folder located inside the Stratford folder in your C: drive
 1. It may also be in a folder named with numbers located in the SSIWIN folder.
 - d. Once you receive a pop up confirmation that your file has been stored, you are done.
 - i. Your file should leave the Outbox in 5-10 minutes.
 1. If your file is still there after 15 minutes and it has a yellow diamond with an exclamation point inside, there is a problem. You may call our helpdesk number for assistance if this occurs. Our helpdesk number is 602.439-2525.
 2. Please also pay attention to the “Kind” column to see if your file is being read as a Test file. If it is, you will see the following “(Test)”.
3. Check your Inbox for reports the next business day once your file has been transmitted.

Reading Your Inbox Reports

The best way to know if your files have been received by your receiver is by reading the response report(s) they send back for each file that you transmit. You will get a response report directly from your receiver within 24 business hours or less.

Our system handles file exchanges with receivers via scheduled task runners. We will connect your mailbox to your receiver when you place a file in your Outbox that needs to be sent. After your file is sent, we will reconnect the same mailbox in 10 minutes and then again 30 minutes later to check for response reports. After that, it will NOT check for files again until the next morning unless you login to the system. The exception to our system being able to connect your mailboxes whenever you login to ClaimShuttle is if your mailbox has not exchanged any files with its receiver for more than 30 days or if it has 12 failed login attempts.

A login activity on your account an hour after a file was transmitted will schedule all your mailboxes to check for files from your receivers. Remember that the mailbox schedules to pull files once it detects your login, so after logging in, give it a minute before you click on your Inbox to check for new reports.

1. Click on your Inbox to see if you have new reports
2. Click on a file to view its contents
 - a. You will notice there are 3 tabs at the top. The Source tab which shows the raw version of the EDI file, the File Information Tab which gives you the file's properties, and the Readable Acknowledgment Tab which shows you the content of your Inbound report
3. Reading 835s (Your Electronic Remits) – if you have signed up to receive electronic remits from your receiver, you will receive files in your inbox that have the numbers 835 in the file name. Files with "835" somewhere in the file name are your electronic remittance advices.
 - a. When you click on an electronic remit, you will have a button to create the readable format of your remit as a pdf file. Click on the button to open the Remit report with Adobe Reader (this means you must have Adobe Reader installed on your PC)
 - i. If you click back onto your Inbox, you will see 2 versions of your Remit. The original raw version that you first clicked on, and its pdf version which translated your remit into a readable report.

Keeping Your Inbox Clean

Over time, you will have lots of reports in your Inbox so it's highly recommended that you create folders in your Account or Inbox that you can move old files to in order to keep your main Inbox clean or download your files then delete them from your ClaimShuttle folder. A folder with too many files will take longer to open.

To add folders to your account or to your Inbox:

1. Click on Folders under the SETUP section from the Main Menu.
2. To add folders under the FOLDERS section of your account above the Inbox, Outbox, and Sent folders, click on New Folder at the top and name your folder.
 - a. To add folders inside your Inbox folder, click on Inbox first and then click on New Folder at the top right and name your folder
3. Move files into the folders you created by putting a check mark on the check box located on the left side of your file's names and then click on the Move button at the top right hand side of the screen. Choose which folder you want to move the file(s) to
4. You will receive a pop up confirmation to let you know how many files were moved and to which directory

Purge Setting

If you want to set your account up to automatically purge your files after a certain number of months you can enable the Auto-Purge feature.

1. Click on Organization under the SETUP section.
2. Click on the Edit button on the upper right hand side of the screen
3. Under Services, choose the number of months for the Auto-Purge feature
 - a. Files purged will be completely deleted out of our system.

Check Eligibility

If you signed up for our Eligibility Inquiry service which pulls inquiries from the CMS HETS system, you will need to first have your Billing NPI approved for submitting inquiries to Medicare's system.

To get approved, do the following:

1. Click on Check Eligibility from the TASKS section located on the Main Menu.
2. Follow the instructions on the screen.
 - a. We only need you to enter your Billing Entity's information
 - i. If you are a Group Practice with 12 providers, we only need your Group Practice Information
3. Once you receive an email from one of the members of AXIOM System's support staff letting you know your access has been granted, you may click on Check Eligibility again to begin your inquires.
4. Enter your patient's Medicare ID# and Name. Click on the "Other Services" button to select or deselect the detailed information you would like returned to you regarding the patient's eligibility
 - a. Click Select when you are done
5. The services you selected will be shown on the front screen and will be saved as your Default Services.
 - a. To remove services, just click on the Other Services button again and uncheck the box for the service(s) you want to remove
6. Click on the Submit button and your results will be displayed immediately
 - a. At this time the HETS system returns general information on many services that you did not select. You will however, see detailed information on the services you selected.

Viewing Past Inquiries

For your convenience we store the results of all of your inquiries in the Eligibility Manger screen.

To see past inquires that you made on your patients:

1. Click on Eligibility Manager located under the TASKS section
2. Under the "Batch" column, select which batch date you would like to see
3. Choose which patient's inquiry results you would like to review
 - a. These are not refreshed results. You will see the original result you received on the day you made the inquiry.

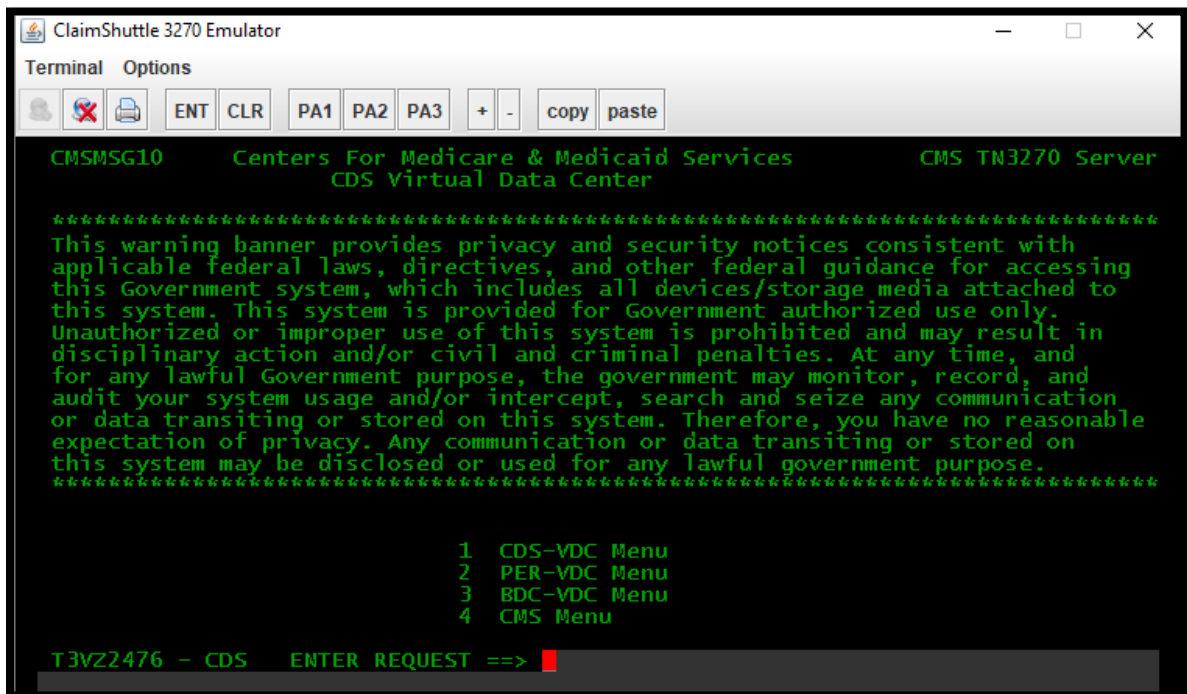
3270 Access

Our 3270 emulator enables users to reach the FISS/DDE system hosted by CMS.

The 3270 screens that users access are driven by the access level linked to their User IDs which are setup by Medicare's EDI department. Access level assignments depend on the system the user chose to apply for when they submitted their 3270/DDE application form to Medicare.

To download our 3270 emulator to reach the CMS systems, do the following:

1. Make sure you have downloaded Java version 8 from www.java.com
2. Click on 3270 Access under the TASKS section
3. For preferred system, choose CMS Hewlett Packard (HP) EDC and click Set
4. Under the Desktop Application tab, click on the Start ClaimShuttle 3270 Emulator button
 - a. If your PC asks you if you would like to use Java Web Start Launcher to open the emulator file, check the box to "do this automatically from now on" and then click OK.
5. When the Black and Green screen comes up it is recommended that you select option 4 to begin and then choose your line of business from there.
6. Eventually you will reach a login screen where you will enter your 3270 User ID and Password that was assigned to you by your Medicare Carrier's EDI department.



Note: Our service allows users to reach these systems. User guides on how to navigate through these screens or help with using these systems once you have logged in will need to be requested from your Medicare Carrier's EDI department. You may also google your Carrier's name then include the words "...FISS DDE GUIDE" to find their guides online.

Claim Data Entry

Need a billing software that can create electronic claim files for more than just Medicare? Or maybe you are just tired of the old software you are using? Try our Claim Data Entry application called SolAce!

The SolAce Billing Software allows users who do not have software that can create EDI files to: enter claims, scrub claims for common errors, and submit claims to their electronic receivers directly from the software. It also enables users to view all of their response reports in a user friendly readable format. Through SolAce, users can not only bill to Medicare, but also to Blue Cross Blue Shield, Medicaid, and Commercial Payers when used along with one of our supported Clearinghouses, ask us for more details! Note that clearinghouses may have their own fees you have to pay for the files you create out of SolAce to be forwarded to your desired payers.

If you have signed up to use our SolAce software, do the following to download your icon:

1. Make sure you have Java version 8 installed on your machine from www.java.com
2. Click on Claim Data Entry Java App under the TASKS menu
 - a. Once it completes downloading, java will automatically launch and put a shortcut icon on your desktop for the SolAce application.
3. See the "SolAce Claims Entry Guide" for Instructions on how to bill using SolAce (this is only provided to users who have signed up for SolAce) or call our helpdesk to schedule a one on one training session.

Helpdesk Contact Information

For support, our helpdesk office hours are Monday – Friday: 6am MST (Arizona) – 4pm MST (Arizona)
Note: We do not observe Daylight Savings so in the Summer we are in the PST zone and in the Winter we are in the MST zone.

Phone Number: (602) 439-2525 option 1, option 2

Fax Number: (866) 436-3785

Support Email: Support@claimshuttle.com

Website URL: www.claimshuttle.com

For urgent Issues during non-business hours send an email to: support@claimshuttle.com