

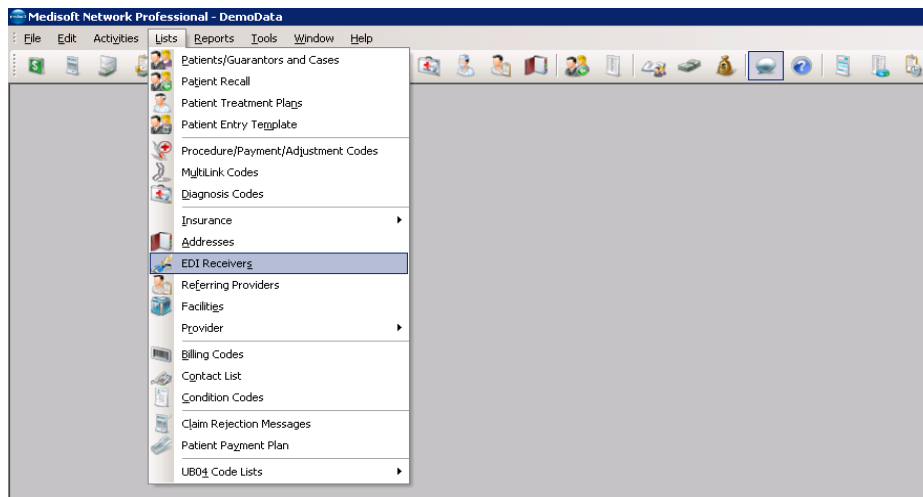
## Setting Up Medisoft 17 to Send 5010 Claims

This article will give instructions on how to setup Medisoft 17 to send 5010 claims with an additional receiver. This article will also give instructions on how to set Revenue Management to send a test batch of claims using the 5010 IGuide (to see if they get paid) while continuing to send 4010 claims.

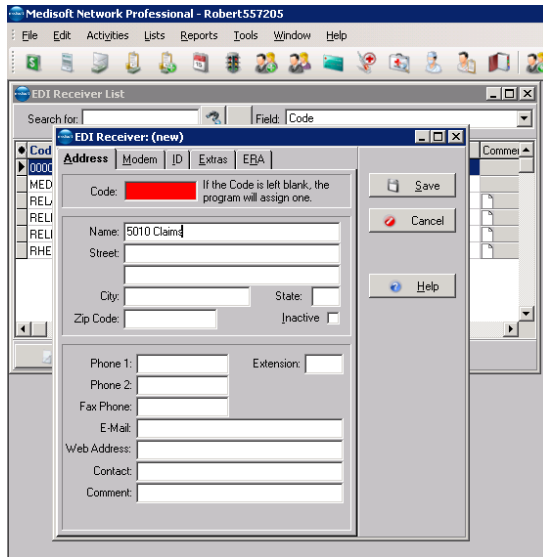
RelayHealth is able to send 5010 claims to the carriers that are setup for the 5010 format. For carriers that are not setup for 5010 claims it is recommended to continue to send claims in the 4010 format to those carriers. To find out if a carrier is setup for 5010 claims go to Collaboration Compass and click on Alerts in the menu. In the Alerts window on the right hand side will be a link; 5010 837 Claims Payer Transition Schedule. That will show you if a carrier is currently taking 5010 claims or when they intend to start accepting 5010 claims.

### Step 1 – Creating a New Receiver

This portion will give instructions on creating a new EDI receiver for sending 5010 claims



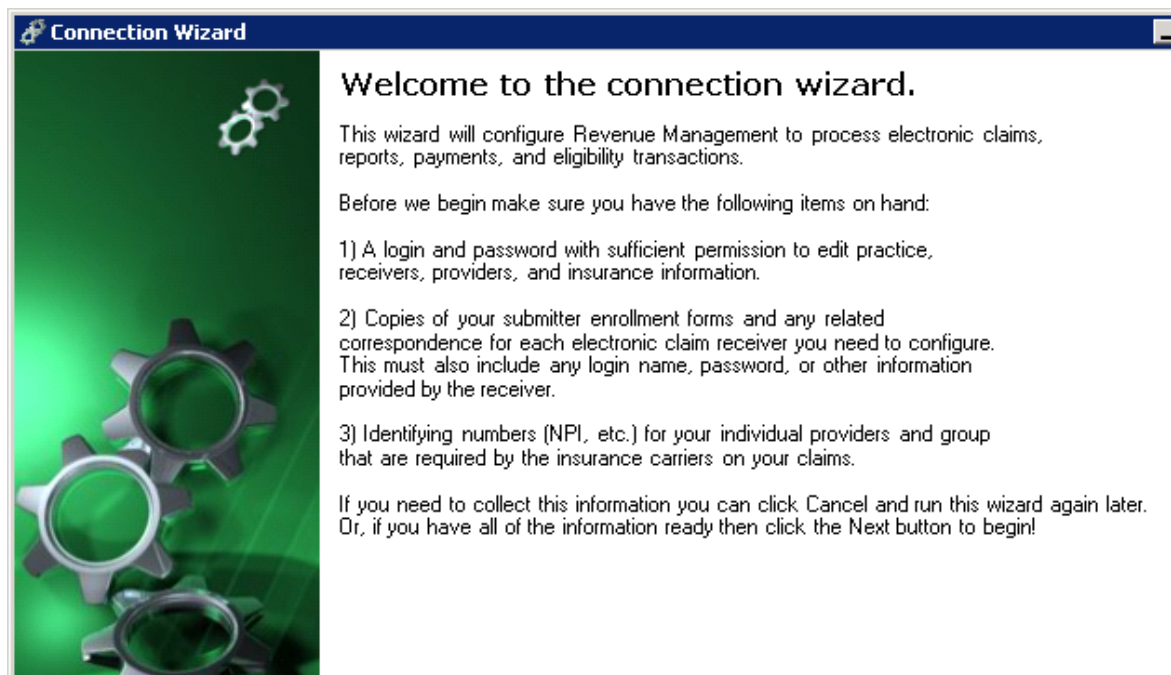
1. In Medisoft click on Lists > EDI Receivers > Click on New



2. In the Name field enter 5010 Claims. Medisoft will assign a code to the new receiver. Then Save

## Step 2 – Configuring the New Receiver

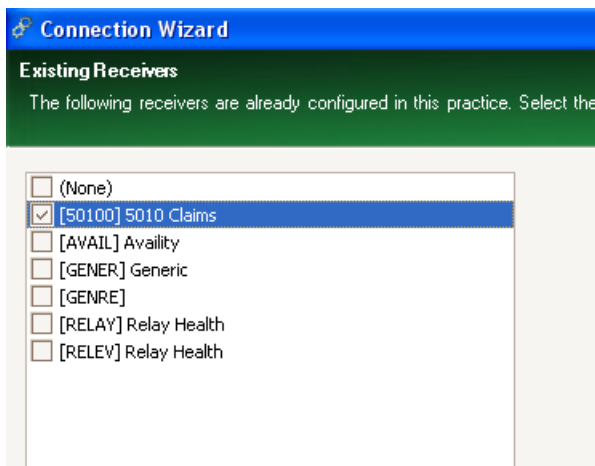
1. Open Revenue Management then click on Process>Change Practice
2. In the Practice Selection window click on Configure. This will open the Connection Wizard



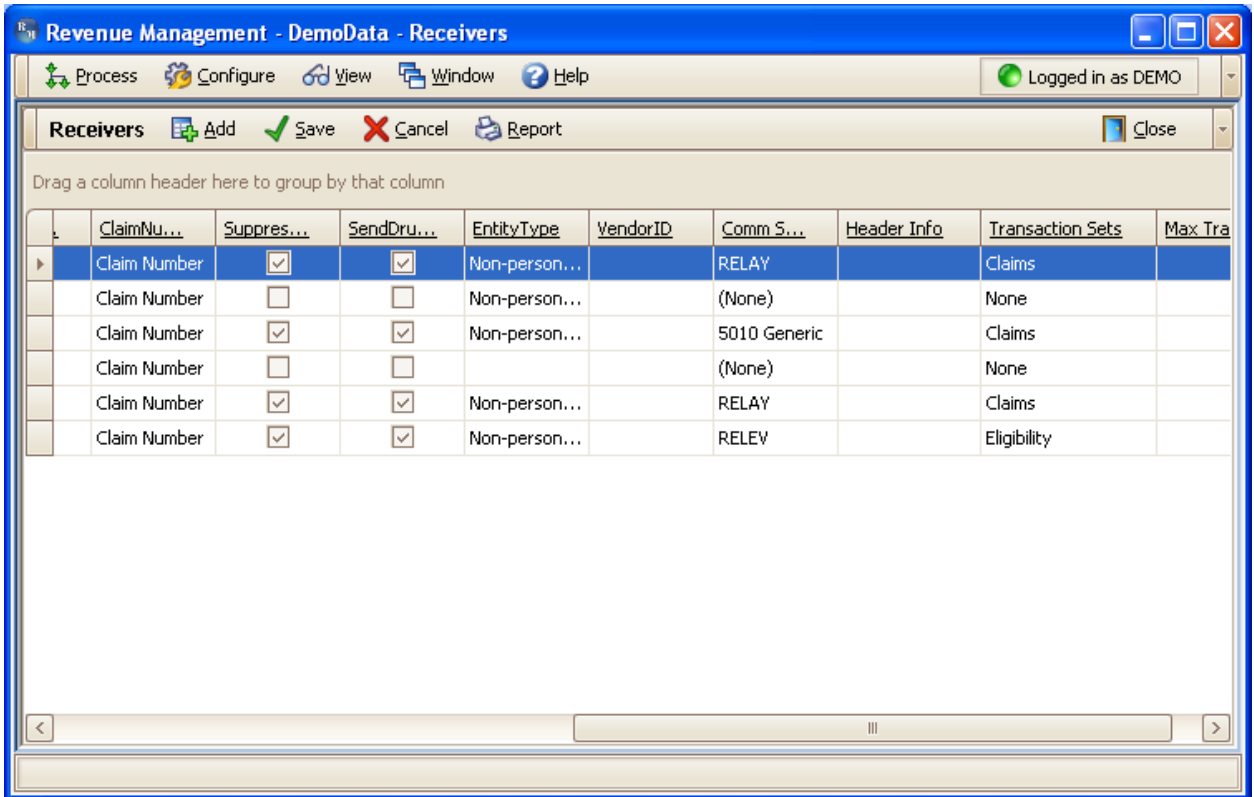
- Click on Next and use your Medisoft login and password to log into the Connection Wizard

<input type="checkbox"/>	Pennsylvania 1711 MS Ambul...	Pennsylvania 1711 MS Ambul...	Pennsylvani...	Pennsylvania 1711 MS Ambulance PA BCBS	PABC1
<input type="checkbox"/>	Pennsylvania 1711 MS ESRD ...	Pennsylvania 1711 MS ESRD	Pennsylvani...	Pennsylvania 1711 MS ESRD PA BCBS	PABC1
<input type="checkbox"/>	Pennsylvania 1711 MS Gener...	Pennsylvania 1711 MS General	Pennsylvani...	Pennsylvania 1711 MS General PA Mcd	PAMD1
<input type="checkbox"/>	Pennsylvania 1711 MS Gener...	Pennsylvania 1711 MS General	Pennsylvani...	Pennsylvania 1711 MS General PA BCBS	PABC1
<input type="checkbox"/>	Pennsylvania 1711 MS Rehab...	Pennsylvania 1711 MS Rehab	Pennsylvani...	Pennsylvania 1711 MS Rehab PA BCBS	PABC1
<input type="checkbox"/>	Pennsylvania 1711 MS Rural	Pennsylvania 1711 MS Rural	Pennsylvani...	Pennsylvania 1711 MS Rural PA BCBS	PABC1
<input checked="" type="checkbox"/>	RelayHealth 1711	RelayHealth for MS17 and LY...	RelayHealt...	RelayHealth MS	RELAY
<input type="checkbox"/>	RelayHealth 1711	RelayHealth for MS17 and LY...	RH Eligibility...	RH Eligibility MS	RELEV
<input type="checkbox"/>	RelayHealth 1711 MS Ambula...	RelayHealth 1711 MS Ambul...	RelayHealt...	RelayHealth 1711 MS Ambulance	RELAY
<input type="checkbox"/>	RelayHealth 1711 MS DME	RelayHealth 1711 MS DME ...	RelayHealt...	RelayHealth 1711 MS DME	RELAY
<input type="checkbox"/>	RelayHealth 1711 MS ESRD ...	RelayHealth 1711 MS ESRD ...	RelayHealt...	RelayHealth 1711 MS ESRD	RELAY
<input type="checkbox"/>	RelayHealth 1711 MS Genera...	RelayHealth 1711 MS Gener...	RelayHealt...	RelayHealth 1711 MS General	RELAY

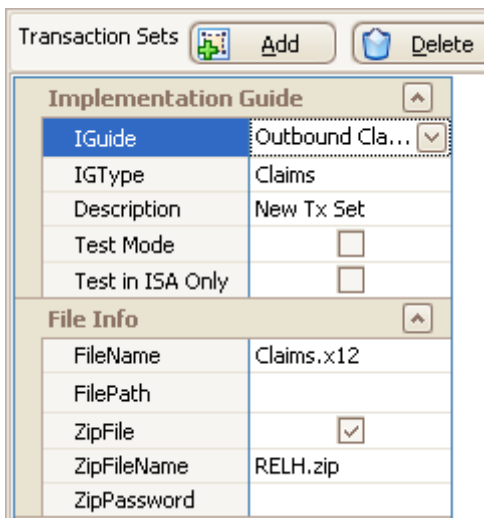
- In the Connection window scroll down and select RelayHealth 1711 as your connection then click Next



- In the Existing Receivers window select the 5010 Claims receiver then click Next
- In the New Receivers window click Next
- In the Additional Receiver Information window enter the contact information, submitter ID, password etc. Then click Next
- In the Configuring Receivers window click Next



- In the Edit Receivers window highlight the 5010 receiver and scroll to the Transaction Sets column and click where it shows Claims

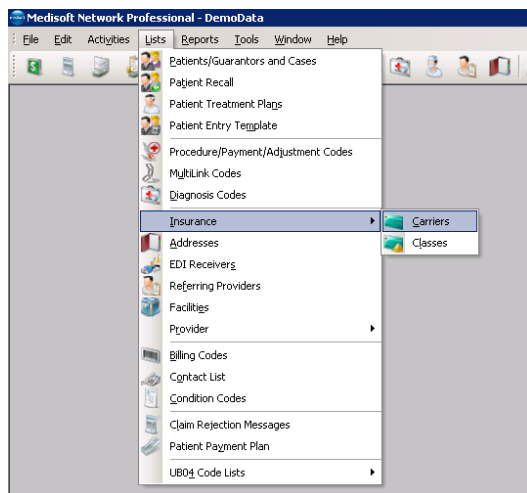


- In the Implementation Guide window click on the IGuide field and expand the list
- Change the IGuide from Outbound Claims (MS17 Prof Claims Direct Connect) to Outbound Claims (MS17 5010 Prof Claims Direct Connect). Then click on the red X to close
- Click on Next then click on Finish

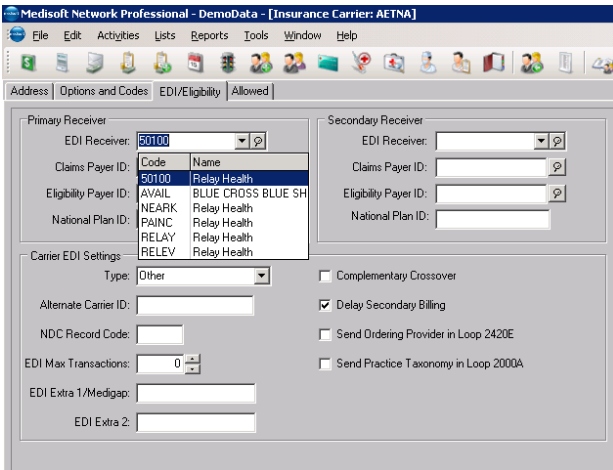
## Step 3 – Attaching the New Receiver

Once the new receiver has been created and configured it will need to be attached to the carriers that you intend to send 5010 claims for. Below are the instructions for attaching the new receiver in Medisoft.

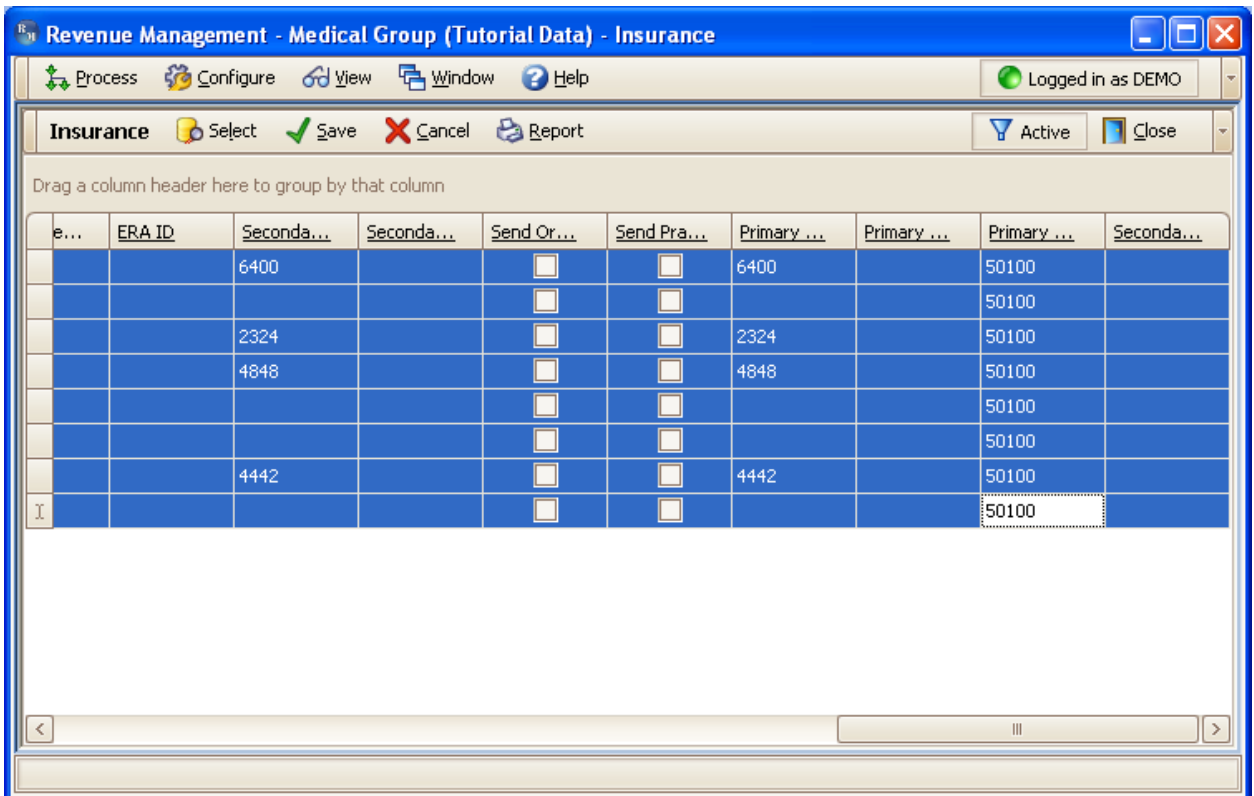
### Attaching the Receiver through Medisoft



1. In Medisoft click on Lists > Insurance > Carriers
2. Select the carrier that you want to send 5010 claims to and double click to open
3. Go to the EDI/Eligibility tab



4. Click on the drop down arrow for the EDI Receiver field and select the 5010 receiver. Then Save
5. If you want to change the EDI Receiver for all your carriers you can do that in the Revenue Management program
6. In Revenue Management click on Configure>Insurance>Insurance List
7. Highlight the carrier at the top of the list then scroll down to the bottom and while holding down the Shift key highlight the last carrier in the list.

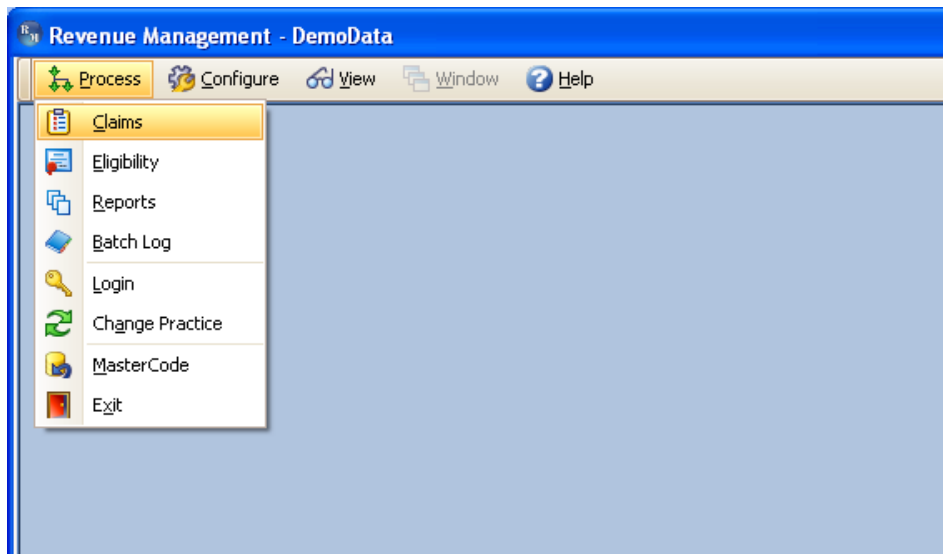


8. Scroll to the right to the Primary EDI Receiver column and type in the Code for the 5010 Receiver and then Save. This will change the Primary EDI Receiver for all the carriers in the list

## Steps to Take to Test 5010 Transmission (see if the claims get paid)

Following are the steps to take if you want to send a batch of claims with the 5010 IGuide, to see if they will be paid, and then switch back to continue to send 4010 claims.

1. Assign the 5010 EDI Receiver to the Insurance Carrier that you want to conduct 5010 testing.
2. In Medisoft prepare a batch of claims as you normally would so that they will be in a Ready to Send state and then proceed to Revenue Manager



3. Click on Process>Claims
4. Check Claims for the 5010 EDI Receiver.
5. Send the claims for the 5010 EDI Receiver. This batch of claims will be sent in the 5010 format.
6. Once the claims have been sent and the reports received, assign the original EDI Receiver back to the Insurance Carrier.

7. You will now be able to send your claims in the 4010 format while waiting to see if the 5010 claims are paid.
8. Once the claims have been paid, assign the 5010 EDI Receiver to the Insurance Carrier.