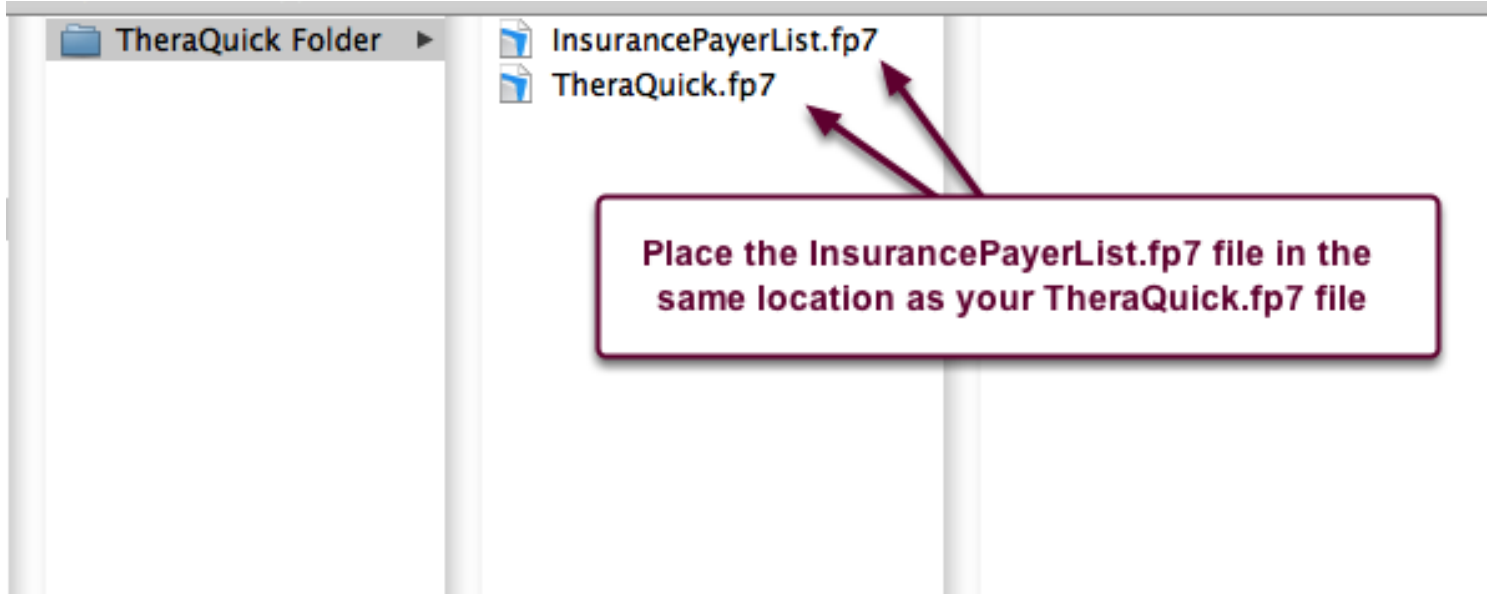


# Using Office Ally as Your Clearing House

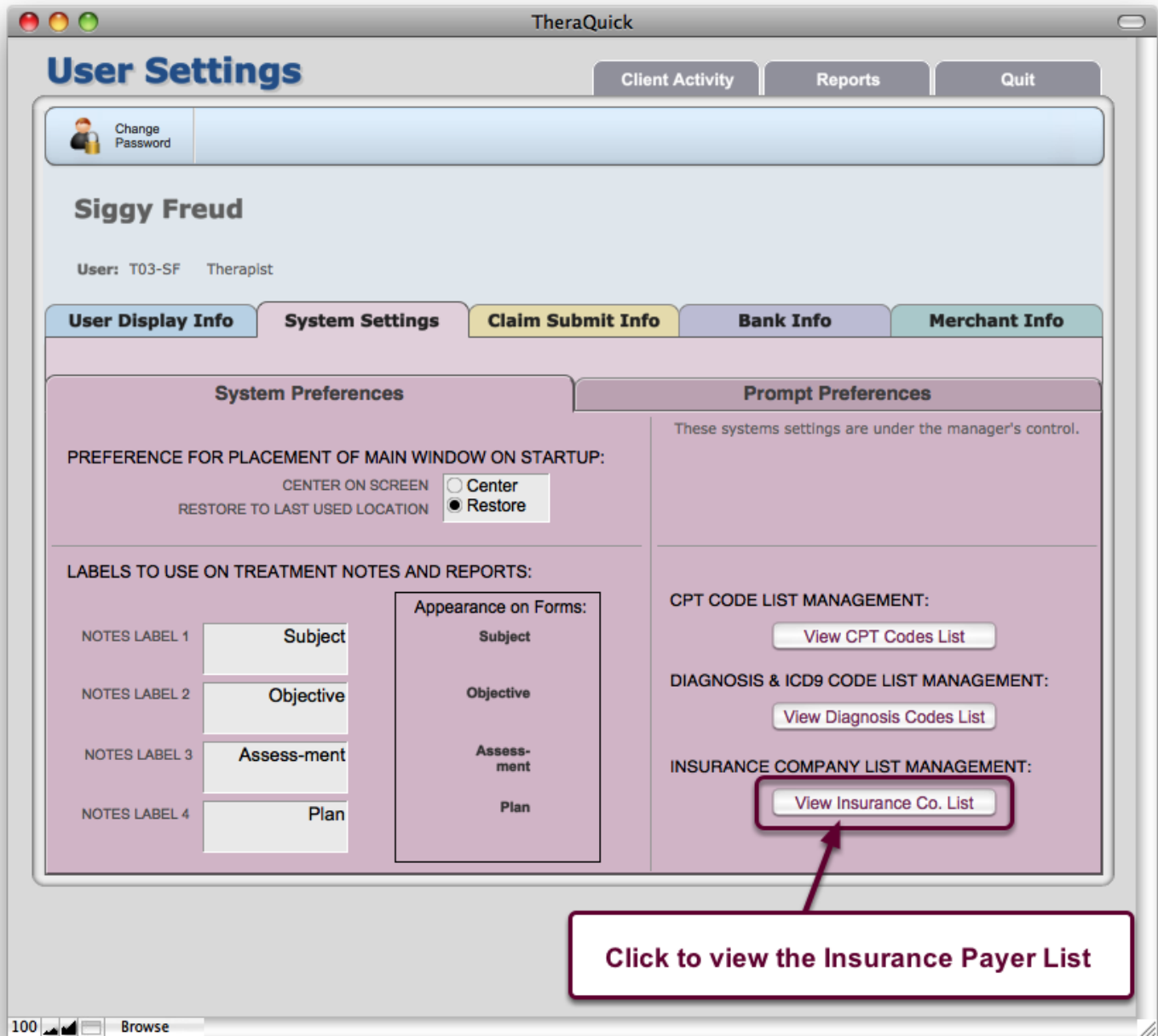
How to use the new capability for submitting electronic claims directly to Office Ally from within TheraQuick, and how to update the insurance payer list with Office Ally's (or any other supported clearing house's) payers.

## Location for placement of the InsurancePayerList.fp7 file



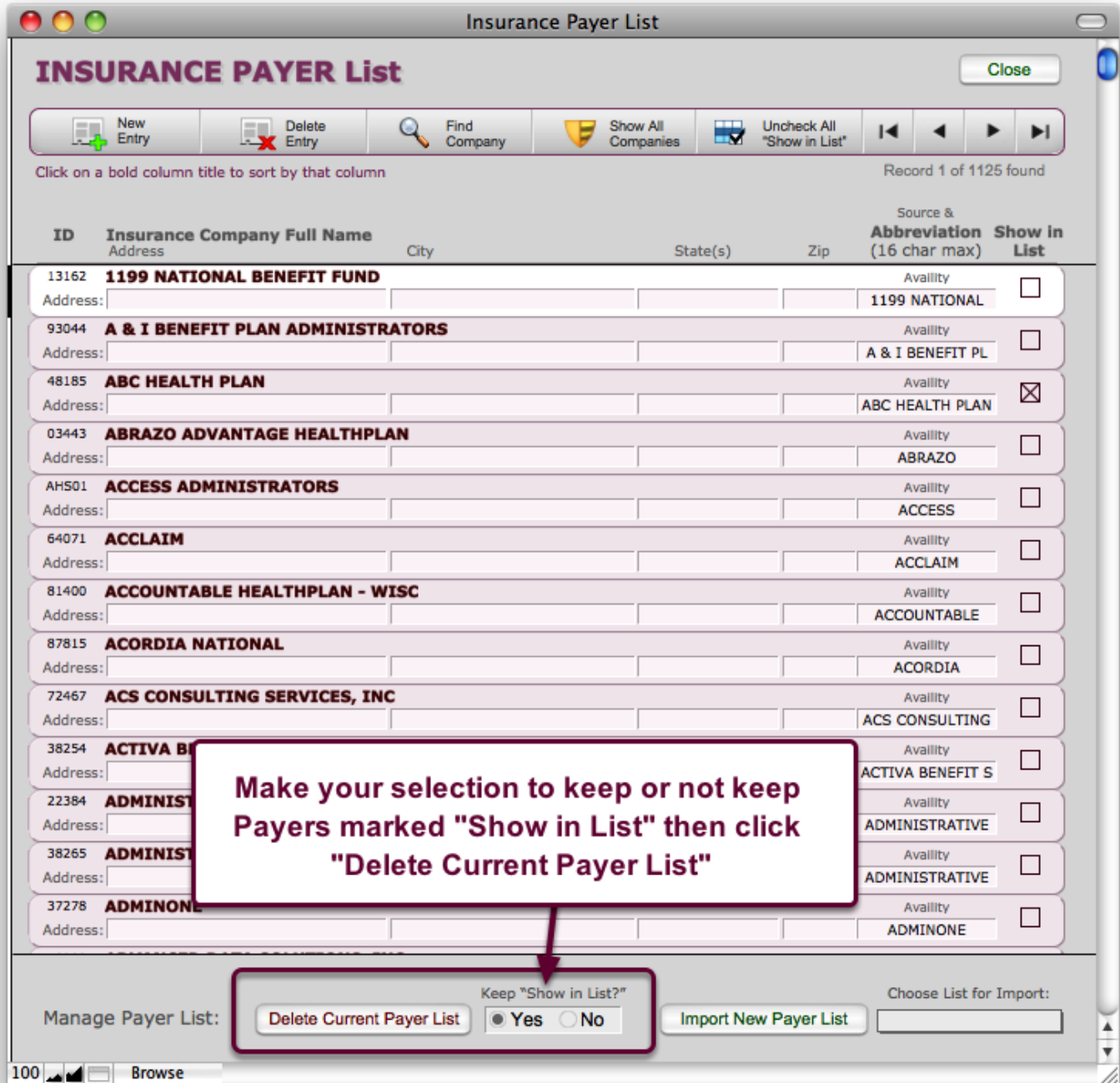
A new file, InsurancePayerList.fp7, was distributed with the 1.8.0 updater. You need to move this file to the same location as your TheraQuick.fp7 file. On a Mac, your TheraQuick.fp7 file was originally installed in a TheraQuick Folder on your desktop. On Windows, your TheraQuick.fp7 file was originally installed in a TheraQuick Folder at the root level of your C drive.

Open the Insurance Payer window



Navigate to your User Settings > System Settings > System Preferences tab, and click on the "View Insurance Co. List" button to open the Insurance Payer List window.

**Remove unnecessary Insurance Payers from your file**



**INSURANCE PAYER List** Close

New Entry Delete Entry Find Company Show All Companies Uncheck All "Show in List"

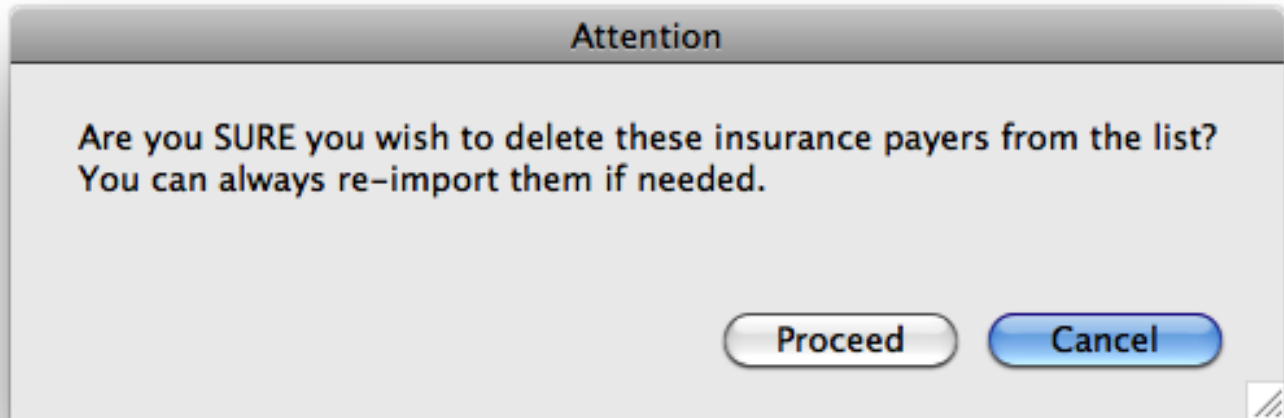
Click on a bold column title to sort by that column Record 1 of 1125 found

| ID    | Insurance Company Full Name                  | Address | City | State(s) | Zip | Source & Abbreviation (16 char max) | Show in List                        |
|-------|--|---------|------|----------|-----|-------------------------------------|-------------------------------------|
| 13162 | <b>1199 NATIONAL BENEFIT FUND</b>            |         |      |          |     | Avallity<br>1199 NATIONAL           | <input type="checkbox"/>            |
| 93044 | <b>A &amp; I BENEFIT PLAN ADMINISTRATORS</b> |         |      |          |     | Avallity<br>A & I BENEFIT PL        | <input type="checkbox"/>            |
| 48185 | <b>ABC HEALTH PLAN</b>                       |         |      |          |     | Avallity<br>ABC HEALTH PLAN         | <input checked="" type="checkbox"/> |
| 03443 | <b>ABRAZO ADVANTAGE HEALTHPLAN</b>           |         |      |          |     | Avallity<br>ABRAZO                  | <input type="checkbox"/>            |
| AH501 | <b>ACCESS ADMINISTRATORS</b>                 |         |      |          |     | Avallity<br>ACCESS                  | <input type="checkbox"/>            |
| 64071 | <b>ACCLAIM</b>                               |         |      |          |     | Avallity<br>ACCLAIM                 | <input type="checkbox"/>            |
| 81400 | <b>ACCOUNTABLE HEALTHPLAN - WISC</b>         |         |      |          |     | Avallity<br>ACCOUNTABLE             | <input type="checkbox"/>            |
| 87815 | <b>ACORDIA NATIONAL</b>                      |         |      |          |     | Avallity<br>ACORDIA                 | <input type="checkbox"/>            |
| 72467 | <b>ACS CONSULTING SERVICES, INC</b>          |         |      |          |     | Avallity<br>ACS CONSULTING          | <input type="checkbox"/>            |
| 38254 | <b>ACTIVA B</b>                              |         |      |          |     | Avallity<br>ACTIVA BENEFIT S        | <input type="checkbox"/>            |
| 22384 | <b>ADMINIST</b>                              |         |      |          |     | Avallity<br>ADMINISTRATIVE          | <input type="checkbox"/>            |
| 38265 | <b>ADMINIST</b>                              |         |      |          |     | Avallity<br>ADMINISTRATIVE          | <input type="checkbox"/>            |
| 37278 | <b>ADMINONE</b>                              |         |      |          |     | Avallity<br>ADMINONE                | <input type="checkbox"/>            |

Manage Payer List: Delete Current Payer List Keep "Show in List?"  Yes  No Import New Payer List Choose List for Import:

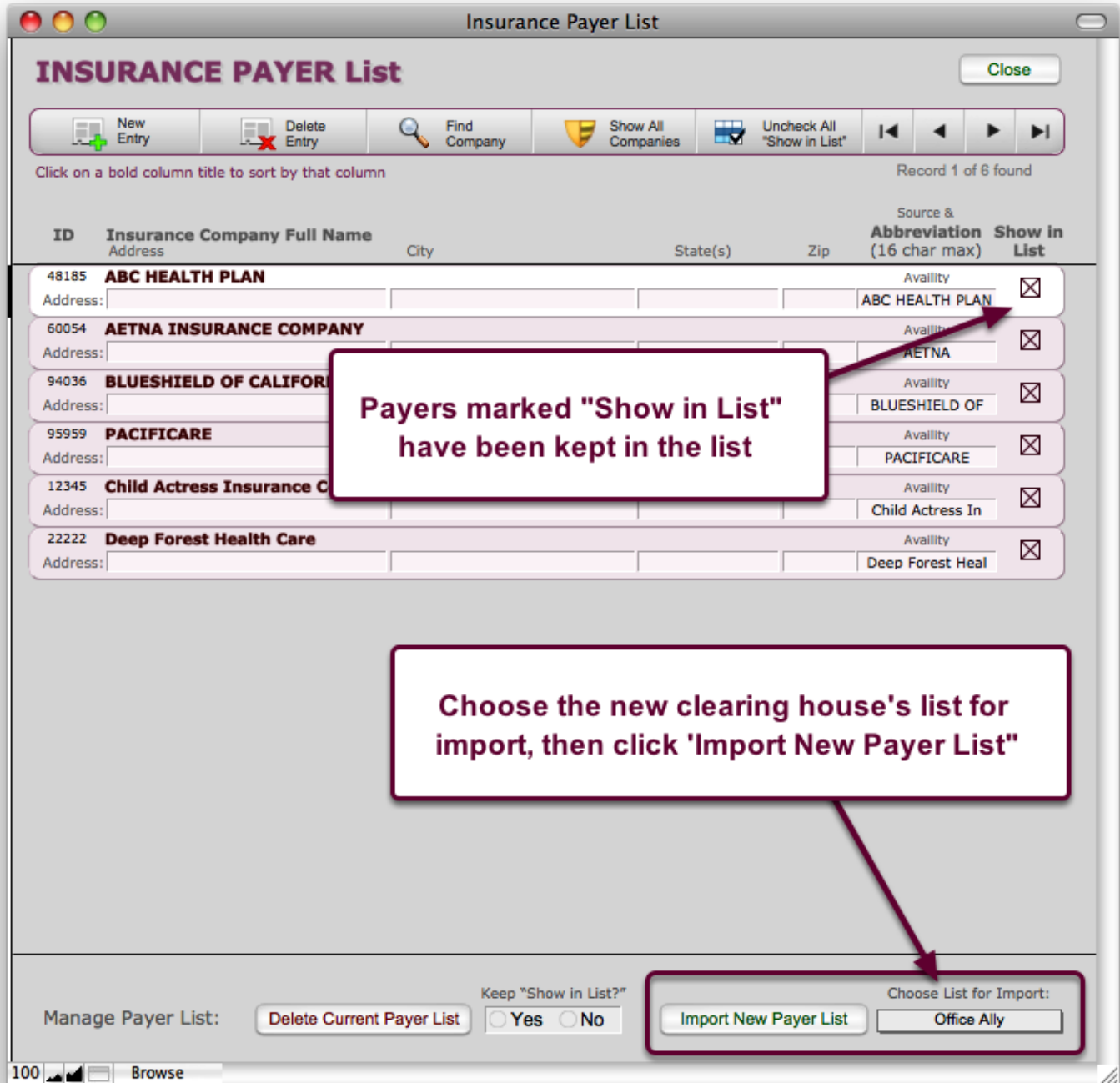
Select "Yes" for Keep "Show in List?" if you want to have the Insurance Companies that you have selected to show in the drop-down list retained in your file. All others will be deleted when you click on "Delete Current Payer List."

Proceed with deleting Payers in the current list



Click "Proceed" to confirm you want to delete the unnecessary Payers from your list.

**Choose the new clearing house to use for importing a Payer List**



**INSURANCE PAYER List** Close

Click on a bold column title to sort by that column Record 1 of 8 found

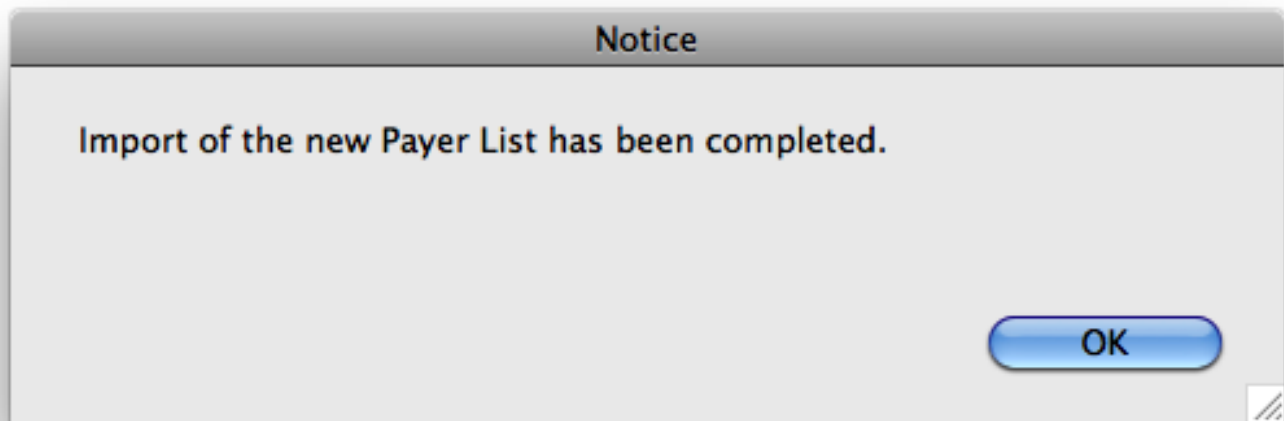
| ID    | Insurance Company Full Name      | Address | City | State(s) | Zip | Source & Abbreviation (16 char max) | Show in List                        |
|-------|----------------------------------|---------|------|----------|-----|-------------------------------------|-------------------------------------|
| 48185 | <b>ABC HEALTH PLAN</b>           |         |      |          |     | Avalitty<br>ABC HEALTH PLAN         | <input checked="" type="checkbox"/> |
| 60054 | <b>AETNA INSURANCE COMPANY</b>   |         |      |          |     | Avalitty<br>AETNA                   | <input checked="" type="checkbox"/> |
| 94036 | <b>BLUESHIELD OF CALIFORNI</b>   |         |      |          |     | Avalitty<br>BLUESHIELD OF           | <input checked="" type="checkbox"/> |
| 95959 | <b>PACIFICARE</b>                |         |      |          |     | Avalitty<br>PACIFICARE              | <input checked="" type="checkbox"/> |
| 12345 | <b>Child Actress Insurance C</b> |         |      |          |     | Avalitty<br>Child Actress In        | <input checked="" type="checkbox"/> |
| 22222 | <b>Deep Forest Health Care</b>   |         |      |          |     | Avalitty<br>Deep Forest Heal        | <input checked="" type="checkbox"/> |

**Manage Payer List:**

 Keep "Show in List?"  Yes  No
 
 Choose List for Import:

If you selected "Yes" to Keep "Show in List?" then only those Payers marked "Show in List" will remain at this point. Make your selection of the clearing house whose Payer List you now wish to import. In this case, we're switching to Office Ally. Click on the "Import New Payer List" button.

## Import of the new Payer List



When the import of the new Payer List is complete, click "OK."

## New Payer List

Insurance Payer List
Close

New Entry Delete Entry Find Company Show All Companies Uncheck All "Show in List"

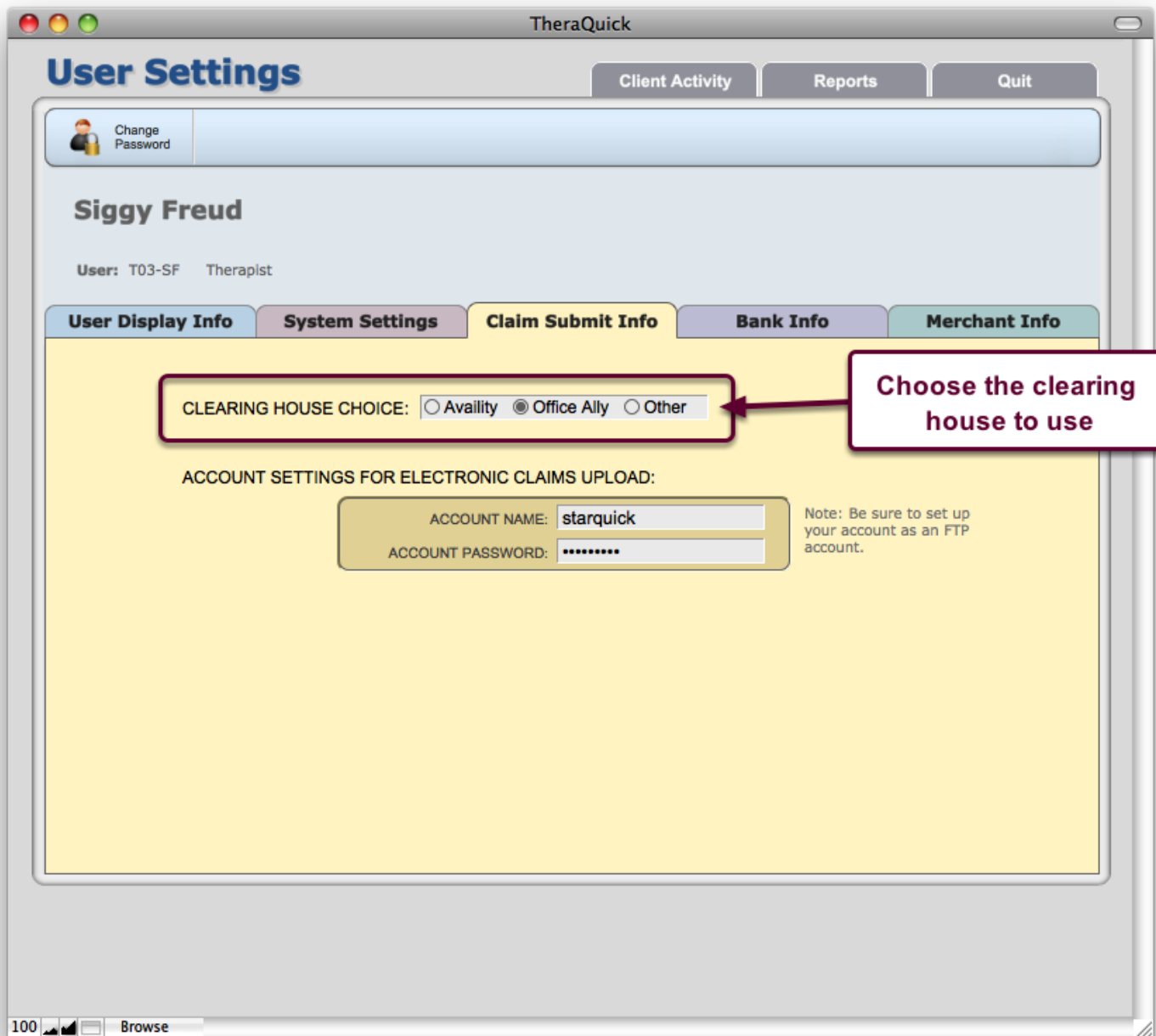
Click on a bold column title to sort by that column Record 1 of 615 found

| ID    | Insurance Company Full Name<br><small>Address</small>                     | City | State(s) | Zip | Source & Abbreviation<br><small>(16 char max)</small> | Show in List                        |
|-------|---|------|----------|-----|---|-------------------------------------|
| 51028 | <b>21st Century Insurance and Financial Services (For Minnesota only)</b> |      | MN       |     | Office Ally<br>21st Century                           | <input type="checkbox"/>            |
| 20413 | <b>3P Admin</b>   |      |          |     | Office Ally<br>3P Admin                               | <input type="checkbox"/>            |
| 48185 | <b>ABC HEALTH PLAN</b>  |      |          |     | Avality<br>ABC HEALTH PLAN                            | <input checked="" type="checkbox"/> |
| 21356 | <b>Acclaim Repricing</b>  |      |          |     | Office Ally<br>Acclaim Repricin                       | <input type="checkbox"/>            |
| AHP01 | <b>Accountable Health Plan - Wisconsin &amp; Iowa</b>                     |      |          |     | Office Ally<br>Accountable Heal                       | <input type="checkbox"/>            |
| AHIPA | <b>Accountable IPA (California)</b>                                       |      |          |     | Office Ally<br>Accountable IPA                        | <input type="checkbox"/>            |
| 36112 | <b>ACS Rewards Administration Center</b>                                  |      |          |     | Office Ally<br>ACS Rewards                            | <input type="checkbox"/>            |
| AHC01 | <b>ActivHealthCare</b>  |      |          |     | Office Ally<br>ActivHealthCare                        | <input type="checkbox"/>            |
| 59141 | <b>Administrative Services, Inc.</b>                                      |      |          |     | Office Ally<br>Administrative S                       | <input type="checkbox"/>            |
| ADVTK | <b>Advantek Benefit Administrators</b>                                    |      |          |     | Office Ally<br>Advantek Benefit                       | <input type="checkbox"/>            |
| 23225 | <b>Aetna Better Health</b>  |      |          |     | Office Ally<br>Aetna Better                           | <input type="checkbox"/>            |
| ADOC5 | <b>Affiliated Doctor's of Orange County (ADOC)</b>                        |      | CA       |     | Office Ally<br>Affiliated Docto                       | <input type="checkbox"/>            |
| APG01 | <b>Affiliated Physicians Group (APG)</b>                                  |      | IL       |     | Office Ally<br>Affiliated Physi                       | <input type="checkbox"/>            |

Manage Payer List:
Delete Current Payer List
Keep "Show in List?"  Yes  No
Import New Payer List
Choose List for Import:

The Insurance Companies in the new Payer List will appear in the list, along with any you elected to keep from the previous list. (The ID is displayed in red if the clearing house for the Payer does not match your current choice in your User Settings.)

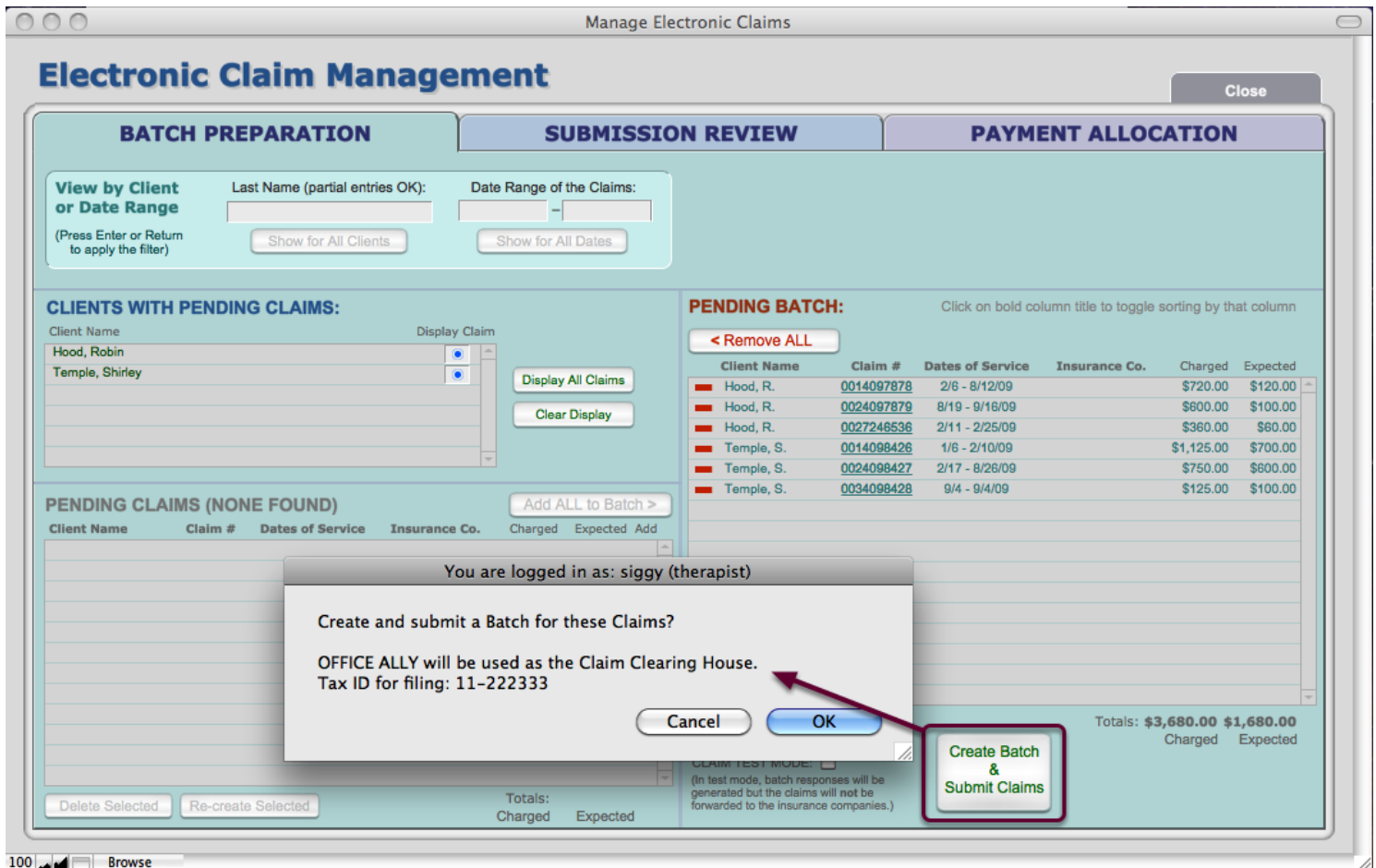
## Change your clearing house choice to Office Ally



The screenshot shows the TheraQuick application window with the 'User Settings' page. The 'Claim Submit Info' tab is selected. Under the 'CLEARING HOUSE CHOICE:' section, the 'Office Ally' radio button is selected. Below this, the 'ACCOUNT SETTINGS FOR ELECTRONIC CLAIMS UPLOAD:' section contains fields for 'ACCOUNT NAME' (starquick) and 'ACCOUNT PASSWORD' (masked with dots). A note on the right states: 'Note: Be sure to set up your account as an FTP account.' A callout box with an arrow points to the 'Office Ally' radio button, containing the text 'Choose the clearing house to use'. The top navigation bar includes 'Client Activity', 'Reports', and 'Quit' buttons. The user's name 'Siggy Freud' and role 'Therapist' are displayed at the top of the settings page.

Navigate to your User Settings > Claim Submit Info tab, and select Office Ally as your clearing house choice. Enter the account information you use to login to your Office Ally account. Now, in the Manage Electronic Claims window, when you choose the "Create Batch and Submit Claim" to submit an electronic claim, the batch EDI file will be securely uploaded to your Office Ally account.

**Using Office Ally to submit claims via FTP**



**Electronic Claim Management**

**BATCH PREPARATION** | **SUBMISSION REVIEW** | **PAYMENT ALLOCATION**

**View by Client or Date Range** Last Name (partial entries OK): \_\_\_\_\_ Date Range of the Claims: \_\_\_\_\_  
 (Press Enter or Return to apply the filter) Show for All Clients Show for All Dates

**CLIENTS WITH PENDING CLAIMS:**

| Client Name     | Display Claim            |
|-----------------|--------------------------|
| Hood, Robin     | <input type="checkbox"/> |
| Temple, Shirley | <input type="checkbox"/> |

Display All Claims Clear Display

**PENDING BATCH:** Click on bold column title to toggle sorting by that column

< Remove ALL

| Client Name | Claim #    | Dates of Service | Insurance Co. | Charged    | Expected |
|-------------|------------|------------------|---------------|------------|----------|
| Hood, R.    | 0014097878 | 2/6 - 8/12/09    |               | \$720.00   | \$120.00 |
| Hood, R.    | 0024097879 | 8/19 - 9/16/09   |               | \$600.00   | \$100.00 |
| Hood, R.    | 0027246536 | 2/11 - 2/25/09   |               | \$360.00   | \$60.00  |
| Temple, S.  | 0014098426 | 1/6 - 2/10/09    |               | \$1,125.00 | \$700.00 |
| Temple, S.  | 0024098427 | 2/17 - 8/26/09   |               | \$750.00   | \$600.00 |
| Temple, S.  | 0034098428 | 9/4 - 9/4/09     |               | \$125.00   | \$100.00 |

Totals: **\$3,680.00** Charged **\$1,680.00** Expected

**CREATE BATCH & SUBMIT CLAIMS**

**Dialog Box:**  
 You are logged in as: siggy (therapist)  
 Create and submit a Batch for these Claims?  
 OFFICE ALLY will be used as the Claim Clearing House.  
 Tax ID for filing: 11-222333  
 Cancel OK

Now, in the Manage Electronic Claims window, when you click on "Create Batch and Submit Claim" to submit an electronic claim, the batch EDI file will be securely uploaded to your Office Ally account. When responses are ready (Office Ally can take up to 24 hours), you can click on "Get Responses for Batch" under the Submission Review tab. TheraQuick will retrieve the response files and will automatically indicate which claims have been accepted or rejected.