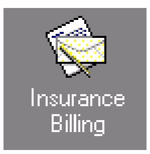
How to Submit Claims using a Print Image File (i.e. Cortex)

This Job Aid assumes that you have successfully opened OD Professional, and have a patient showing in the Patient Address View window:

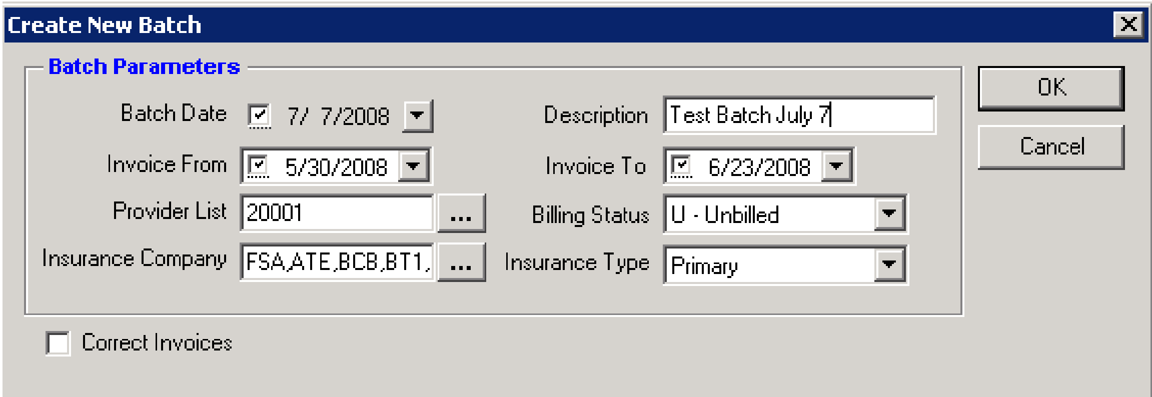
Part 1:

1. Click the Start tab in the Workspace Manager (vertical tabs area on the left).
2. Click on the Back Office / Administration bar at the bottom, and the Back Office icons will appear.
3. Click on the Insurance Billing icon.



4. The Bill Invoice Posting View window will appear.
5. Ensure that you are on the right location when filing. To do this, click on Records from the top menu bar, then Locations, and select your location.
6. Also, from this same window, ensure that you are on CORTEX CMS when filing. To do this click on the **CMS Report** drop down menu and choose PrintImagecms1500 from the list. The menu option could also be listed as Cortex depending on how the print image file was named.
7. Keep in mind that Guy must set up a “print image” and Cortex folder. The print image file is a text file, and you can rename this to say Cortex if you desire.
8. Guy will also add a transfer button to print, which will be required for Step 25.
9. Click on New Batch.

The Create New Batch window will appear:



10. On the **Invoice From** box, select your date parameters. *Remember that this is the date the invoice was created, and NOT the DATE OF SERVICE.

11. On the **Invoice To** box: select the Date you want your billing to end. *Remember that you need to do a complete day. Therefore, if you are filing today, select YESTERDAY'S date.

12. On the **Billing Status** Box, check Unbilled (for new invoices).

13. On the **Insurance Type** Box, you can check either Primary (which is usually the case) or secondary, other or All (although the All button does not work at this time).

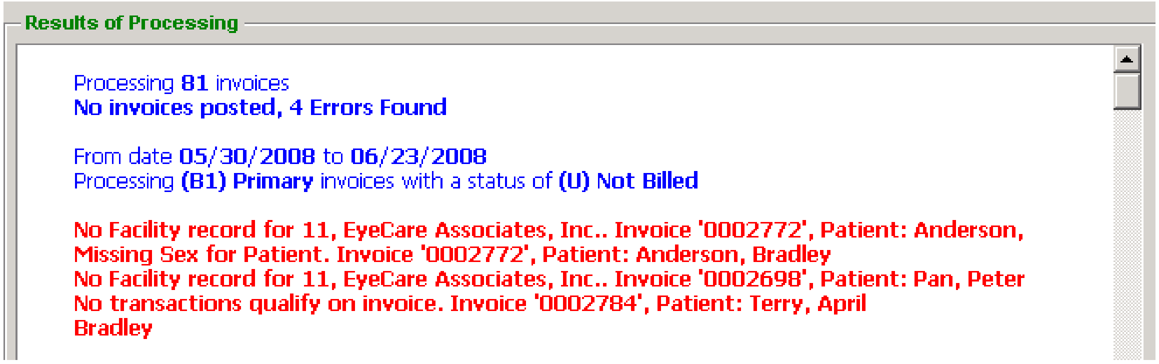
14. On the **Description** Box, put a description for this batch. It can be a date range for the claims you submitted. For example, "Medicare 06/30 – 7/31".

15. **Provider List** Box: click the browse button and choose the correct provider(s) from the list.

16. **Insurance Company** Box: click the browse button and then deselect the insurances you do not need. For example: Blank, Assigned Fee Schedules, Fee Schedule New, Insurance Balance Forward, Self Pay, Test, Visions Care Plan, Vision Services Plan, and other insurances that you do not intend to send to Cortex.

17. Click OK

18. An error checking box will pop up going through the error checking process. Once it's done, it will show you all the errors in that batch. If you see red in the results, click on the Batch Edits Required tab.



Notes:

- make sure you are on one location (ie. State College at top left).
- To do this, click on Records from the top menu bar, then Locations, then select CMS Report or Print Image CMS.
- For multiple locations, select a different location (beside Handler drop-down), then go back up to Records >> Locations and re-select the proper location to activate it.
- Also note that the provider location must match the chosen location.

19. Remember the Batch ID (you can also see your batch ID if you scroll to the top of the list in the Current Batches area), and click on the Print button

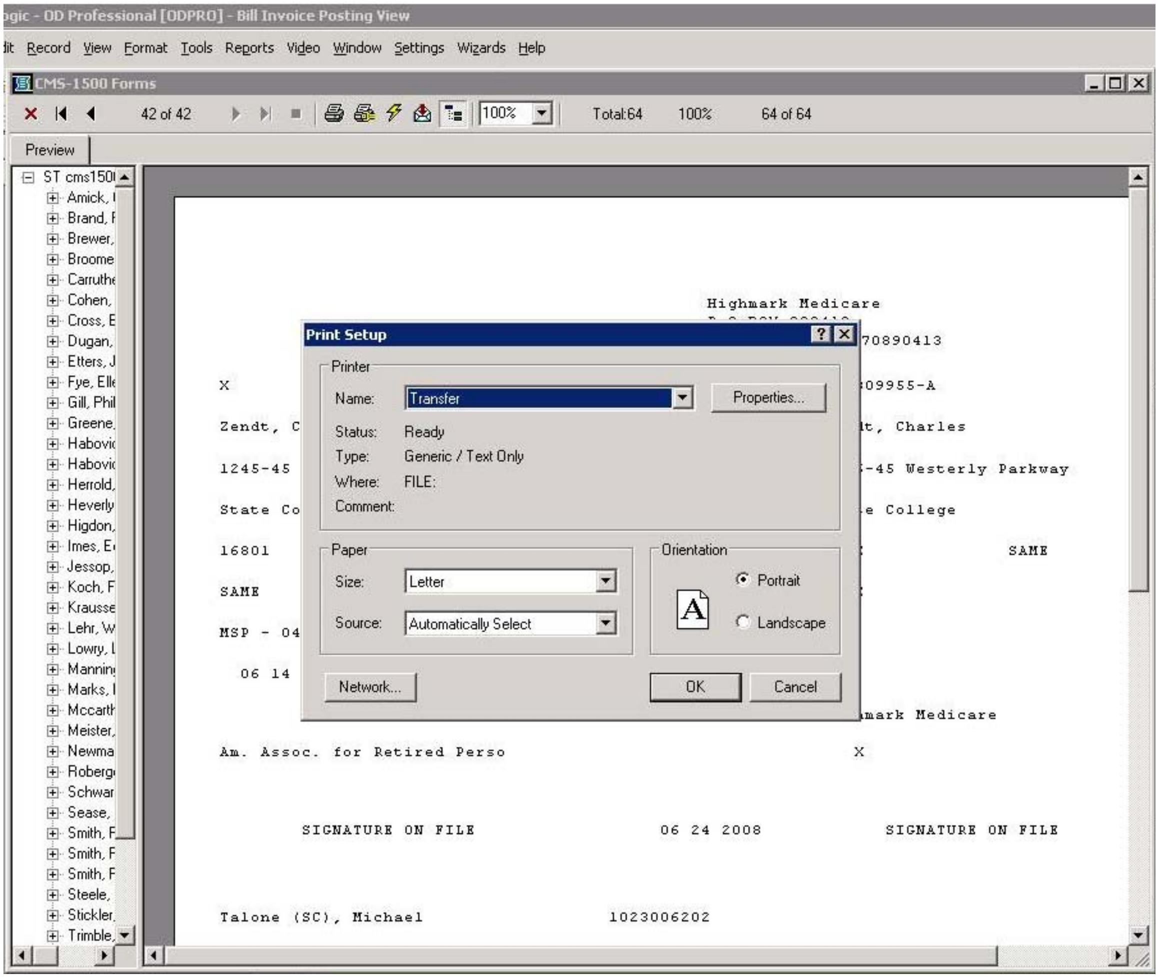
Note: you will need this Batch ID number when you name your transfer file (see #25 below)

20. Click Finish

21. In order to send the batch off to Cortex, you must click on the Print button. This will bring up the CMS Forms page with all the patients you are sending.

22. Go to the very last page to make sure that all the claims are good (ie. 42 / 42 claims show). If you see something such as 11 / 42, then something is wrong.

23. Go to the top of the page and press the printer button icon. The Print Setup box will pop up.



24. Make sure that the Name field is set to Transfer

25. Type in: drive letter:\cortex\batch#.txt

    Note: the drive letter depends on where OD Professional is located on your computer.

26. Click OK.

Note: *You should receive training on this section from Cortex EDI (or other clearinghouse that submits claims using a print image file).*

Part 2:

From EBILLER (a program icon located on your / your client's computer)

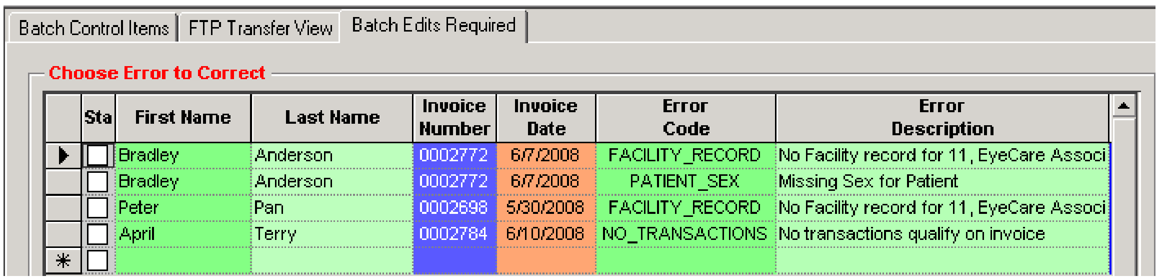
27. Minimize the ODPro screen and click on the EBILLER icon (on your desktop).

28. Click on Import, and there should be a Cortex folder. Select the text file that was saved in Step 25, and click on Open.

29. Click on the Audit button, and the user will audit their claims and send them from there

30. NOW: Go back to ODPro to edit the claims that did not go into that batch (the ones with errors).

31. To edit those claims, go to the Batch Edits Required Tab at the top. All the patients that need editing will be sitting there.



32. Go to each patient individually with the arrow, Press F2, and this will bring up the patient's name in the tree on the left hand side of your screen.

33. Read what you need to correct. Go to the invoice in the patient's account and do the necessary edits.

34. Follow steps 1 to 29 again. You will send the edited batch to Cortex now.

35. The parameters for this new batch will stay the same.