

## How to Submit to Gateway:

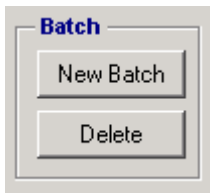
Assuming you have successfully opened OD Professional, and have a patient showing in the Patient Address View window:

### Part 1:

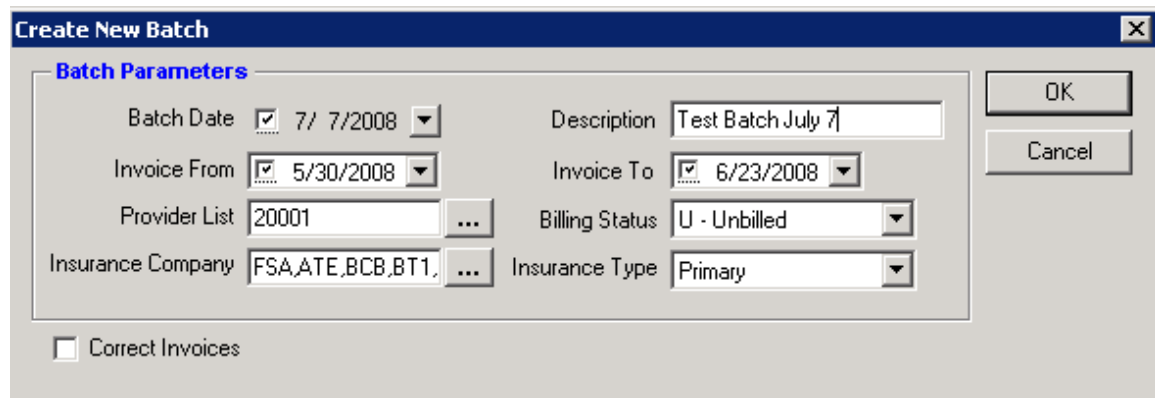
1. Click the Start tab in the Workspace Manager (vertical tabs area on the left).
2. Click on the Back Office / Administration bar at the bottom, and the Back Office icons will appear.
3. Click on the Insurance Billing icon.



4. The Bill Invoice Posting View window will appear.
5. Click on New Batch.





The Create New Batch window will appear:

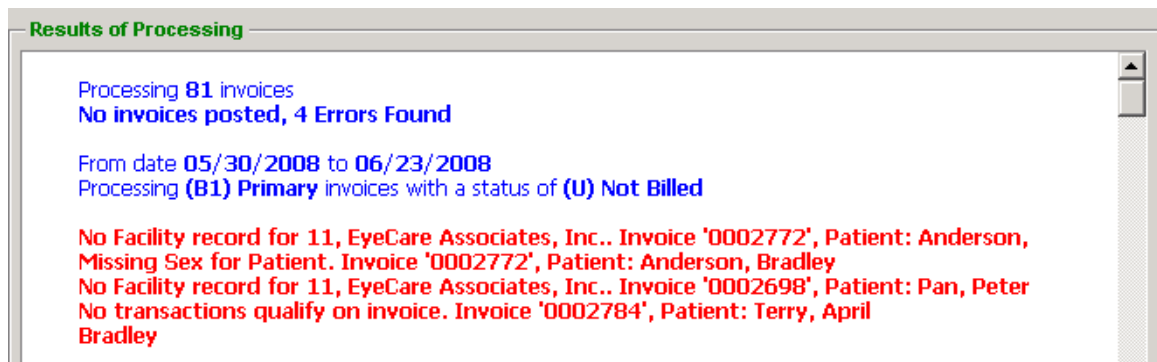

 A screenshot of the "Create New Batch" dialog box. It has a title bar with "Create New Batch" and a close button. Below the title bar is a section titled "Batch Parameters" containing several fields:
 

- Batch Date:  7/ 7/2008
- Invoice From:  5/30/2008
- Provider List: 20001
- Insurance Company: FSA,ATE,BCB,BT1
- Description: Test Batch July 7
- Invoice To:  6/23/2008
- Billing Status: U - Unbilled
- Insurance Type: Primary

 At the bottom left, there is a checkbox labeled "Correct Invoices" which is currently unchecked. On the right side of the dialog, there are "OK" and "Cancel" buttons.

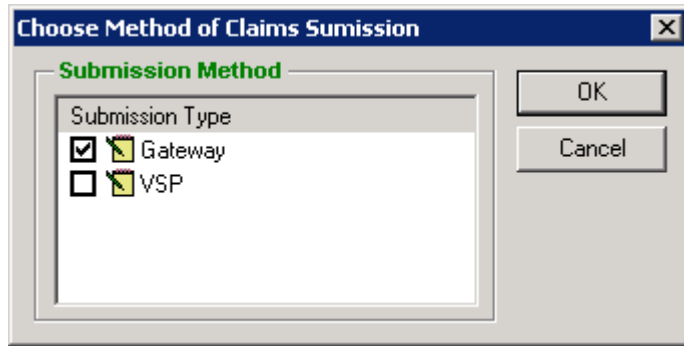
6. On the **Invoice Date FROM** box, select your date parameters.  
 \*Remember that this is the date the invoice was created, and NOT the DATE OF SERVICE.

7. On the **Invoice Date 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.
8. On the **Billing Status** Box, select Unbilled (for new invoices).
9. On the **Insurance Type** Box, you can select either Primary (which is usually the case) or secondary, other or All (although the All button does not work at this time)
10. On the **Description** Box, enter a description for this batch. It can be a date range for the claims you submitted. For example, “Medicare 06/30 – 7/31”
11. **Provider List** Box: click the browse button  and choose the correct provider(s) from the list.
12. **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, Vision Care Plan, Vision Services Plan, and other insurances that you do not intend to send to Gateway.
13. Click OK
14. 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.

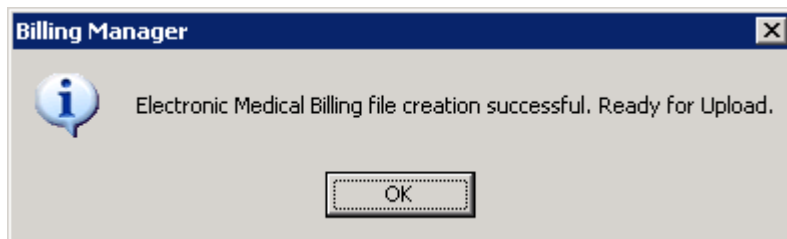


**Note:** An additional Job Aid will explain how to go back and fix errors.

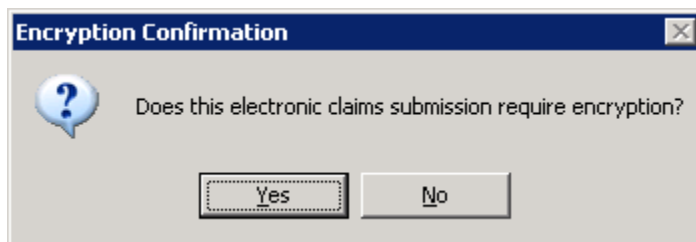
15. Click Finish.
16. From the Batch Control Items tab, select the Submit button, and then select Gateway from the list.



17. You will see the following message (EMB file creation was successful):



18. When asked if you require encryption, select Yes if you are using the FTP site, and No if you are using the Gateway website (Note, using the website is the preferred method.)

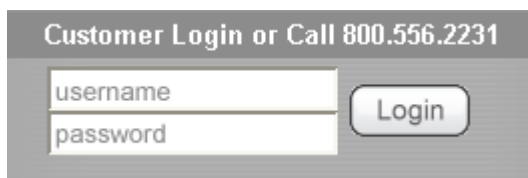


19. You have now completed Part 1, and can continue on to Part 2:

Part 2:

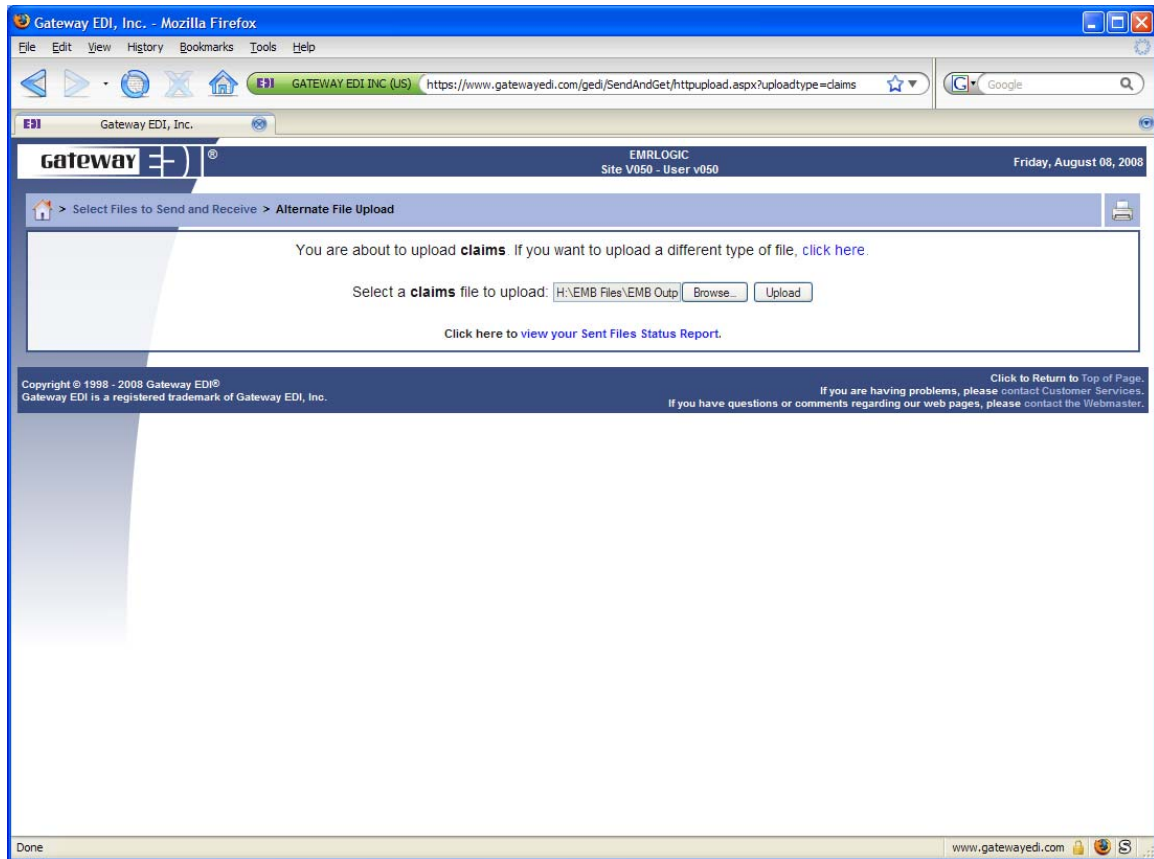
20. Go to the Gateway website: <http://www.gatewayedi.com/>

21. Sign in to the website:

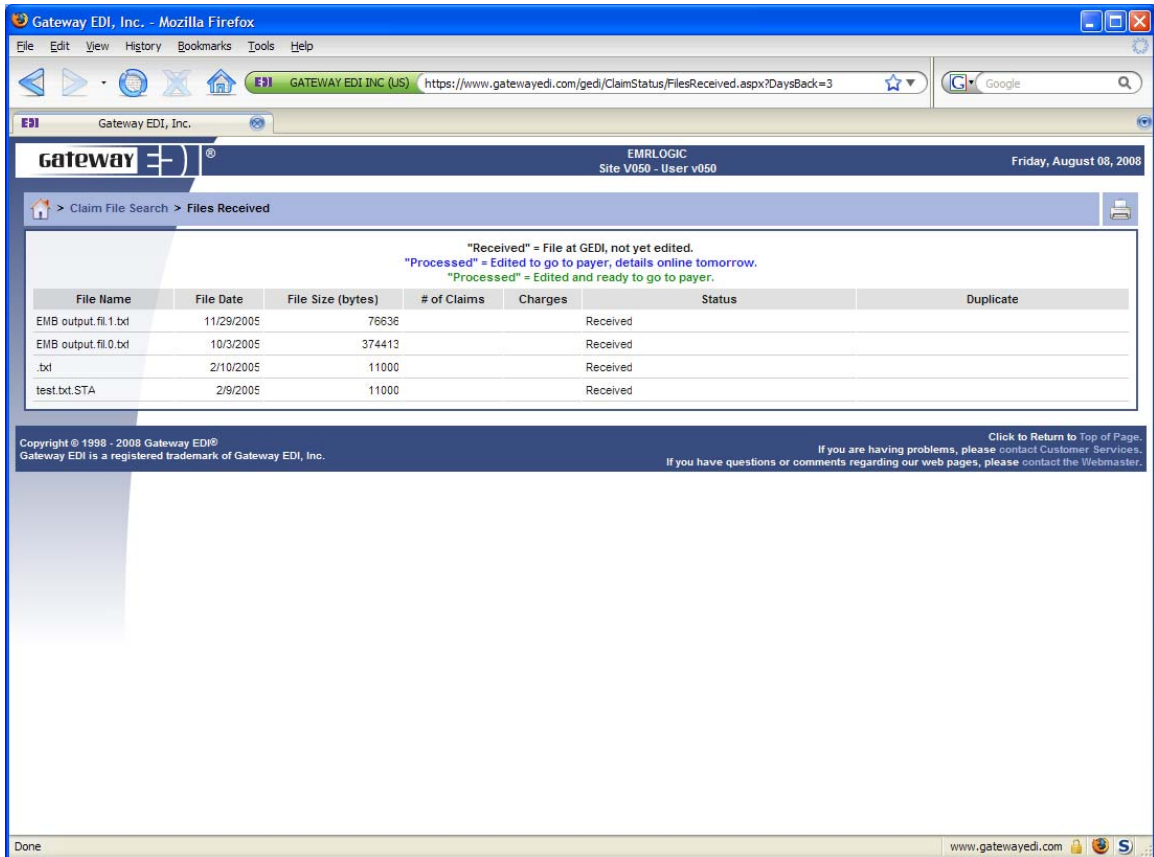


22. Click on send/receive (the left menu option), and then Browse for the file on your system. The file will be named “EMB output.fil”, and should be

located in a folder named H:\EMB file (the drive letter may be different on your system). **DO NOT** send the text file named EMB output.txt.



23. Highlight the file, and then click on the Upload button.
24. Wait for a “file uploaded” message and then click on the link “Click here to view you Sent Files Status Report” to see a list of uploaded files.
25. An example file name would be EMB.output.fil.0.txt



The screenshot shows a web browser window displaying the Gateway EDI, Inc. website. The page title is "Gateway EDI, Inc. - Mozilla Firefox". The address bar shows the URL: "https://www.gatewayedi.com/gedi/ClaimStatus/FilesReceived.aspx?DaysBack=3". The page content includes a navigation menu with "Claim File Search" and "Files Received". Below the navigation is a table with the following data:

File Name	File Date	File Size (bytes)	# of Claims	Charges	Status	Duplicate
EMB output.fil.1.txt	11/29/2005	76636			Received	
EMB output.fil.0.txt	10/3/2005	374413			Received	
.txt	2/10/2005	11000			Received	
test.txt.STA	2/9/2005	11000			Received	

Below the table, there is a footer with copyright information: "Copyright © 1998 - 2008 Gateway EDI® Gateway EDI is a registered trademark of Gateway EDI, Inc." and a link to "Return to Top of Page".

26. You will see a Status Report where you can check the status. If you see “False” in the Duplicate column this is GOOD, if you see “True”, then this is BAD.

27. Once you have confirmed that the file has arrived at Gateway you are done.