

How to Set-up and Use Electronic Billing (EDI) in DGL Practice Manager

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Overview of EDI

Electronic Billing is the process whereby invoices are sent electronically from your computer to Insurance Companies. This process is also referred to as EDI (Electronic Data Interchange). Practice Manager allows you to submit bills via Healthcode, allowing electronic invoicing to the major UK insurers.

Who are Healthcode ?

Healthcode Ltd is the trusted provider of secure online billing to the UK's private health market. Healthcode Ltd facilitate the sending of private medical insurance claims electronically and process bills for virtually every private UK hospital and medical insurer. For more information on Healthcode, please visit their website at www.healthcode.co.uk.

Advantages of Electronic Billing

Because the entire billing process is electronic - postage, printing and stationery costs are reduced or eliminated. Because information is sent securely from your computer directly to Healthcode, and then on to the Insurance Companies computer for payment, the entire process can take place very quickly and accurately. Claims are validated and errors corrected before they are sent to the Insurer. Possible human error caused by insurers re-keying paper claims is eliminated.

How does it work?

When an invoice is entered into Practice Manager, you will be given the option to send the invoice electronically. If you choose to, the invoice becomes an EDI invoice and you are given a separate Claim Information Screen into which you must enter the patient's membership number and some additional claim details.

All EDI invoices are stored during the course of the day, until you decide to transmit them by clicking on a "Send Electronic Claims" menu option. Practice Manager then validates all waiting claims to ensure that they have the necessary information, and transmits them to Healthcode who forward them to the Insurers.

"What information do I need to be able to send invoices electronically?"

For the initial setup and registration process you will need:

- Your BUPA Provider Number
- Provider Numbers for the Surgeons you work with (Anaesthetists only)
- Details of all hospitals that your consultants work from

For each invoice, you will also need:

- Patient's name and address (including postcode)
- Patient's date of birth
- Patient's insurance company and membership number
- The procedure code for any services performed
- Dates of any services performed, along with admission and discharge dates for in-patient procedures (not necessary for Anaesthetists).
- An approximate "diagnosis" for the patient's condition

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"What else is needed before I can send invoices electronically?"

In addition to the above, you will also need the following items from Healthcode Ltd :

- Healthcode Reference (Site ID)
- A "Web Services" User Name and Password to allow your Practice Manager software to access the Healthcode system
- Confirmation from Healthcode as to which of the participating Insurers will accept electronic claims from your Practice.

"What does it cost ?"

There is no charge to send invoices electronically.

Configuring Practice Manager

How do I set up Practice Manager to send claims electronically?"

Before sending any claims electronically, you must perform the following steps. Although these may look tedious, please bear in mind that these only ever have to be performed ONCE.

1. Enabling EDI – New System
2. Enabling EDI – Old System
3. Set up your list of Hospital Codes
4. Enter your Provider details
5. Select which Insurers to send electronic invoices to

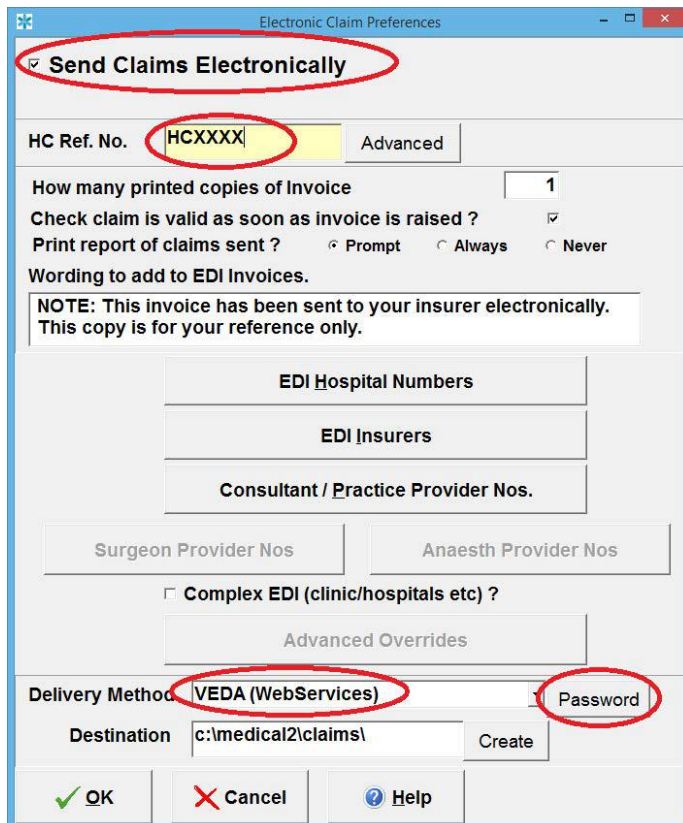
1. Enabling EDI – New System

From the main menu of Practice Manager, select Misc, Preferences, Billing Preferences, EDI Preferences.

- Tick "Send Claims Electronically"
- Type in your "Healthcode Ref" - this is usually in the form HCXXXX
- Set Delivery Method to "VEDA (webservices)"

From the main menu of Practice Manager, select Misc, Preferences, Billing Preferences, EDI Preferences.

- Tick "Send Claims Electronically" (this may already be on if other consultants on your practice are already setup)
- Type in your "Healthcode Ref" (this is usually in the form HCXXXX). If there is already a "Healthcode Ref" entered then do not remove this, proceed to "Enabling EDI (Existing System)"



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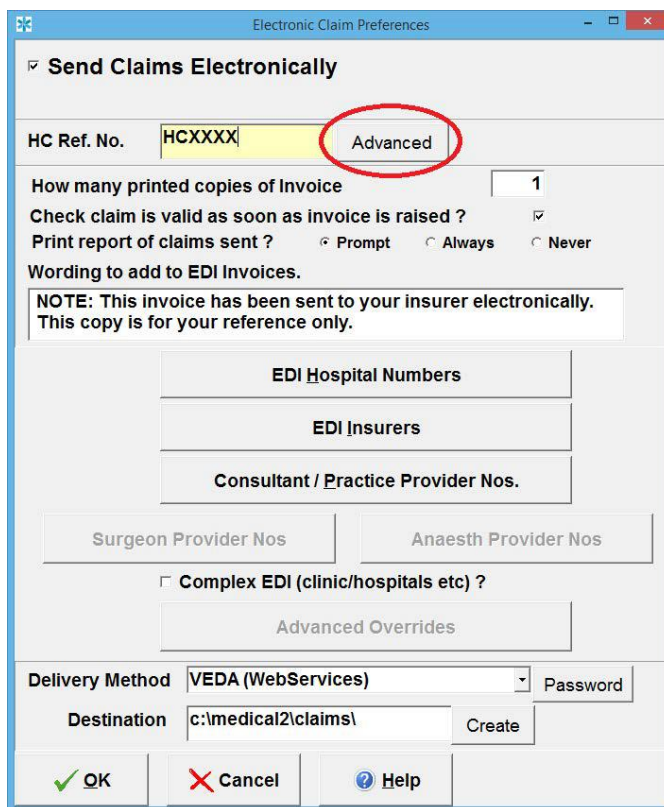
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- Set Delivery Method to "VEDA (webservices)"
- Click Password then enter in Web Services username and password. If there is already a username and password entered then do not remove them.

2. Enabling EDI – New System

From the main menu of Practice Manager, select Misc, Preferences, Billing Preferences, EDI Preferences.

- Click advanced next to HCA Ref. No.



Electronic Claim Preferences

Send Claims Electronically

HC Ref. No. **Advanced**

How many printed copies of Invoice

Check claim is valid as soon as invoice is raised ?

Print report of claims sent ? Prompt Always Never

Wording to add to EDI Invoices.

NOTE: This invoice has been sent to your insurer electronically. This copy is for your reference only.

EDI Hospital Numbers

EDI Insurers

Consultant / Practice Provider Nos.

Surgeon Provider Nos

Anaesth Provider Nos

Complex EDI (clinic/hospitals etc) ?

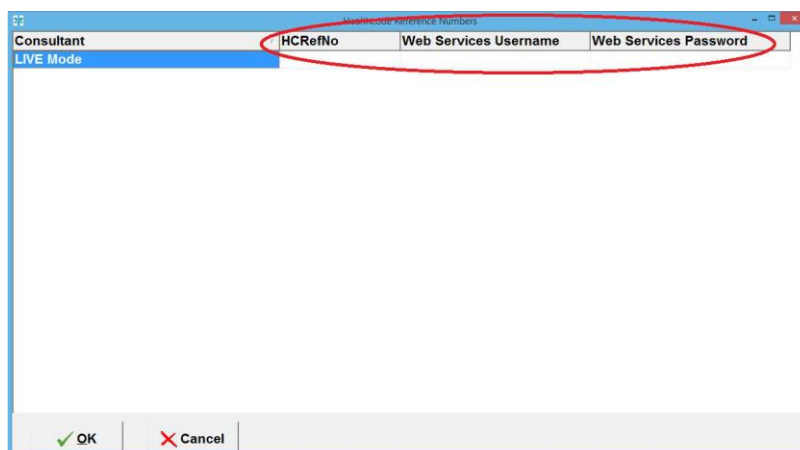
Advanced Overrides

Delivery Method Password

Destination Create

OK Cancel Help

- In line with your consultants name type in your "Healthcode Ref" (this is usually in the form HCXXXX) then Web Services Username and Password.



EDI Hospital Numbers

Consultant	HCARefNo	Web Services Username	Web Services Password
LIVE Mode			

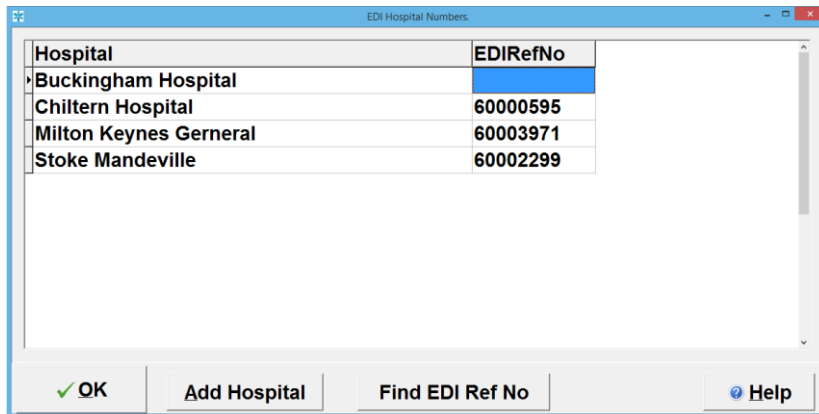
OK Cancel

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2. Setting Up Hospital Codes

From the EDI Preferences screen, click the "EDI Hospital Numbers" button.

You will be presented with a list of hospitals that Practice Manager has listed for your practice. EVERY one of your hospitals must be assigned its correct "EDI Reference Number" in order to identify the exact hospital to the Insurers. The ONLY exception to this is if any of the entries that refer to Consulting Rooms where only consultation will take place (i.e., no procedures) – in which case their reference number can be left blank. This screen below will allow you to find the correct reference number for each hospital.



Click on the first hospital in your list that does not have a reference number entered, then click the "Find EDI Ref No" button.

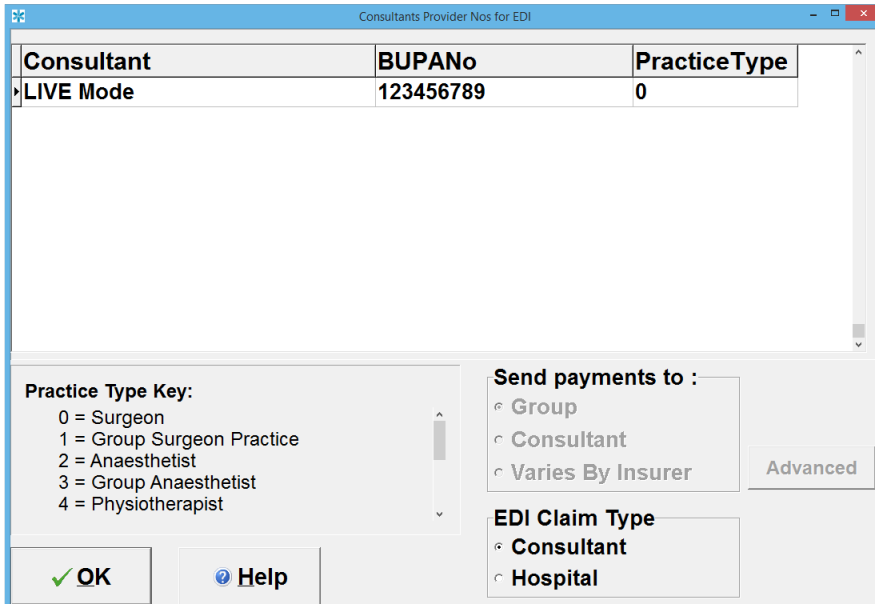
Note: If not all of the hospitals you work from are shown on your hospital list, click "Add Hospital" – you will then be able to add procedures) – in which case their reference number can be left blank.

A complete list of all hospitals in the UK will be displayed. To find the hospital you require either type part of the hospital name into the "Hospital Name" box, or type the town into the "Town" box. The list will then change to only show hospitals that match your entry.

Click on the required hospital, then click the "OK" button. The correct EDI Reference Number will then be added to your hospital list. Once all of your hospitals have their correct Reference Numbers entered, click "OK" to return to the Preferences screen.

3. Provider Numbers

From the EDI Preferences screen, click on the "Consultant / Practice Provider No" button. This screen allows you to record the BUPA Provider Numbers for each Practice Manager license you own.



Consultant	BUPANo	PracticeType
LIVE Mode	123456789	0

Practice Type Key:
 0 = Surgeon
 1 = Group Surgeon Practice
 2 = Anaesthetist
 3 = Group Anaesthetist
 4 = Physiotherapist

Send payments to :
 Group
 Consultant
 Varies By Insurer Advanced

EDI Claim Type
 Consultant
 Hospital

OK Help

For each entry in the list (except for the Training Mode) click into the "BUPA No." column and enter the correct 8 digit BUPA provider number for this consultant or practice, ie, if this is a single-consultant practice enter your BUPA Provider Number. For a Group Practice, enter your Group Provider Number.

Ensure that the "Practice Type" is correct for each entry. A list is displayed in the bottom left corner of the screen showing what each Practice Type number means.

Click the "OK" button when complete.

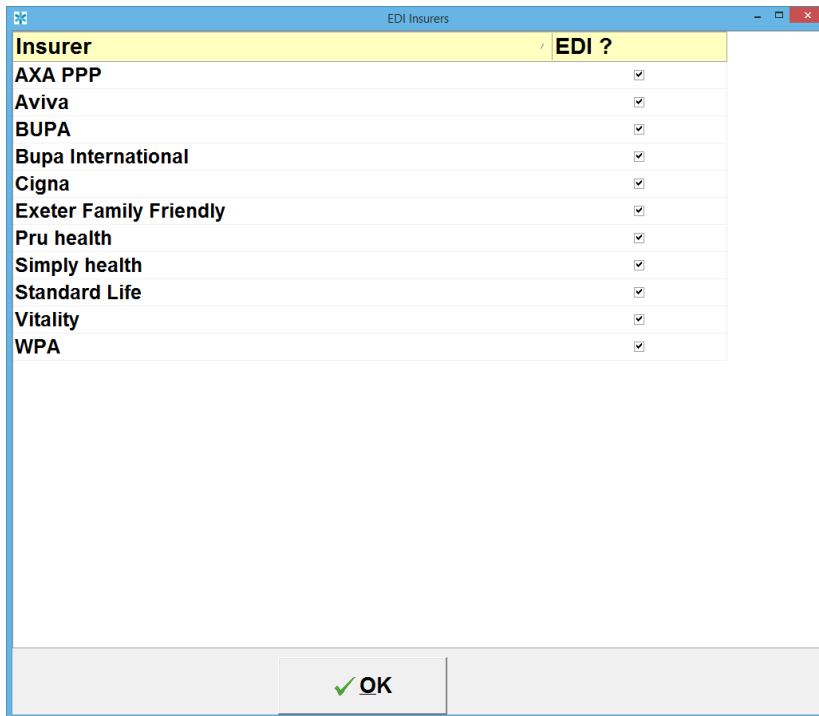
Group Practices

If you have a Group Surgical Practice version of Practice Manager, you should click on the "Surgeon Provider Nos" button to record the Provider Number for each consultant within your group. Ensure that every entry in the list has their correct 8-digit BUPA Provider Number entered.

Group Anaesthetist versions should click "Surgeon Provider Nos" button AS WELL AS the "Anaesth Provider No".

4. Selecting Available Insurers

From the EDI Preferences screen, click the "EDI Insurers" button.



Insurer	EDI ?
AXA PPP	<input checked="" type="checkbox"/>
Aviva	<input checked="" type="checkbox"/>
BUPA	<input checked="" type="checkbox"/>
Bupa International	<input checked="" type="checkbox"/>
Cigna	<input checked="" type="checkbox"/>
Exeter Family Friendly	<input checked="" type="checkbox"/>
Pru health	<input checked="" type="checkbox"/>
Simply health	<input checked="" type="checkbox"/>
Standard Life	<input checked="" type="checkbox"/>
Vitality	<input checked="" type="checkbox"/>
WPA	<input checked="" type="checkbox"/>

Tick the insurers that Healthcode have confirmed will accept claims electronically from your practice.

Note: Insurers that you can send claims for are:

- Allianz Worldwide Care (Only Hospitals can bill)
- Aviva
- AXA PPP
- Bupa
- Bupa International
- Cigna
- Exeter Family Friendly
- Healix Health Services
- Pru health
- Simply health
- Standard Life
- Vitality
- WPA

Click the OK button.

Click the OK button on EDI preferences screen then restart Practice Manager.

Your computer will now be ready to start sending invoices electronically!

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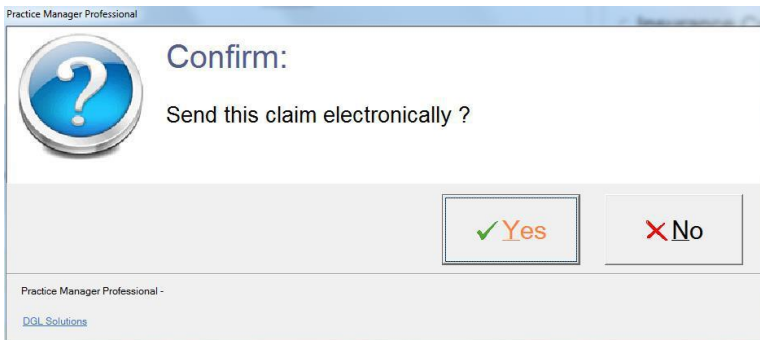
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Creating an Invoice

Differences between a Paper Invoice and an Electronic Invoice

When you use the "Service Invoice" screen in Practice Manager to create an invoice for a patient who is insured by one of the participating Insurers, you will be asked

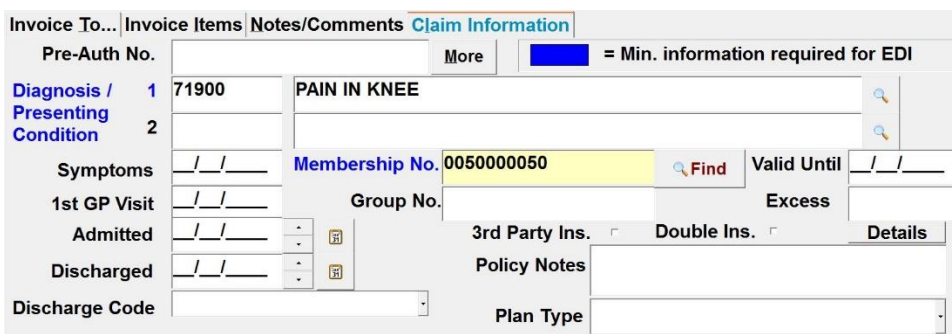


Click "Yes" to specify that this claim is an EDI invoice instead of a paper invoice. Enter the rest of the invoice in exactly the same way as you would for a normal paper invoice.

When entering items onto the invoice, please remember the following:

- ALL items on the invoice must have either a valid CCSD Code or a valid ISC Code (Industry Standard Code).
- Each invoice can have as many outpatient items as required, but any in-patient items must be for a single treatment episode. For example, an invoice may contain items for several consultations on different dates, but all operations on an invoice must be for a single date. If you need to invoice for more than one in-patient episode, split each episode onto a separate invoice.

Before clicking on the "Finish Invoice" button (to complete the invoice), click on the "Claim Information" tab along the top of the screen.



For the purposes of an Electronic Invoice, the items shown in blue are mandatory and must be completed. Other items are optional. Please note that the mandatory fields may vary between different Insurers, and also vary depending on the items you are invoicing for (ie, "Date Admitted" only applies if you are invoicing for an in-patient procedure).

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The most common fields are:

Diagnosis/Presenting Condition

- Practice Manager and the Healthcode VEDA system both use the ICD9 coding system for diagnoses. If you know the correct ICD9 code, enter it into the box on the left. If you do not know the code, type a "keyword" into the box on the right instead (such as "knee" or "hip").
- A list of all codes and descriptions containing your keyword will then be displayed for you to select from. If there is no exact description for the patient's diagnosis, select the closest match. Only one diagnosis is usually required, but there is space for a second diagnosis if you so wish.

Membership No.

- Enter the correct Membership Number for this patient. Practice Manager will check to ensure that the number entered is of the correct format for this patient's Insurer and will display a warning if the number is invalid.

Once all of the required fields have been completed, finish the invoice in the same way as normal (by either clicking the OK button in the bottom left corner of the screen, or clicking "Finish Invoice" from the Service Items page).

The invoice will then be created (and a paper copy printed if required), however the invoice DOES NOT get sent to the Healthcode VEDA system immediately. Instead, all electronic invoices are batched together to await upload (see section 4 of this document).

Sending Electronic Invoices to Healthcode

As mentioned in the previous chapter, electronic invoices are not sent immediately to the Healthcode system when each invoice is created. Instead they are held in a batch so that they can be sent all in one go.

To do this, click on "Send Electronic Claims" from the Billing Menu.

After a few seconds, the following screen will be displayed:

Send Electronic Claims (web services)

All medical bills submitted electronically are validated and cleared by Healthcode Ltd to the criteria determined by the recipient

Send	Valid	Consultant	Invoice No	Patient	Insurer
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Training Mode	12345	Adam, Jillian	AXA PPP Healthcare
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Training Mode	12346	Bladen, Adrian	BUPA
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Training Mode	12347	Alderson, Hilda G	BUPA
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Training Mode	12348	Adams, Linda	AXA PPP Healthcare
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Training Mode	12349	Adams, Bridget	BUPA

5

Just show claims for this consultant ?

Send Claims

Any invoice shown in red are not "valid" (as they have mandatory information missing), but claims shown in black ARE valid and can be sent without additional information.

Only invoices that are shown as "valid" can be transmitted. In order to fix an invalid claim, click the faulty invoice then click the "Fix Claim Info" button. You will then be shown a list of problems relating to that particular invoice. Clicking the "Fix" button will then take you to the appropriate screen where the missing or incorrect information will be highlighted and can be corrected.

Click the "Send Claims" button to send the claims

(Note: Any claims which are still invalid will be ignored and will not be included. These can be corrected and transmitted at a later date).

You have now sent your first electronic invoice!