HTP Transaction Manager

User's Guide

Healthcare Transaction Processors, Inc.

Last Revision:

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Introduction

Purpose

This guide will help you use this web site to upload batch files and to download reports.

Format

The guide contains **three key areas:**

- Setup
- Upload/Download
- Inquiries

Getting Help

Please report problems to CUSTOMERSERVICE@HTP-INC.COM.

Minimum System Requirements

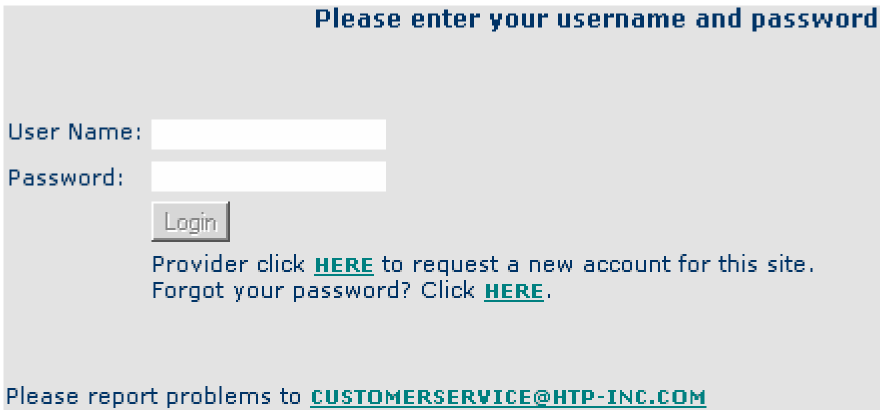
To use the **HTP Transaction Manager**, make sure your computer meets the following minimum requirements:

- 56.6 K modem and internet connection
- Internet Explorer 6.0

Setup

Purpose

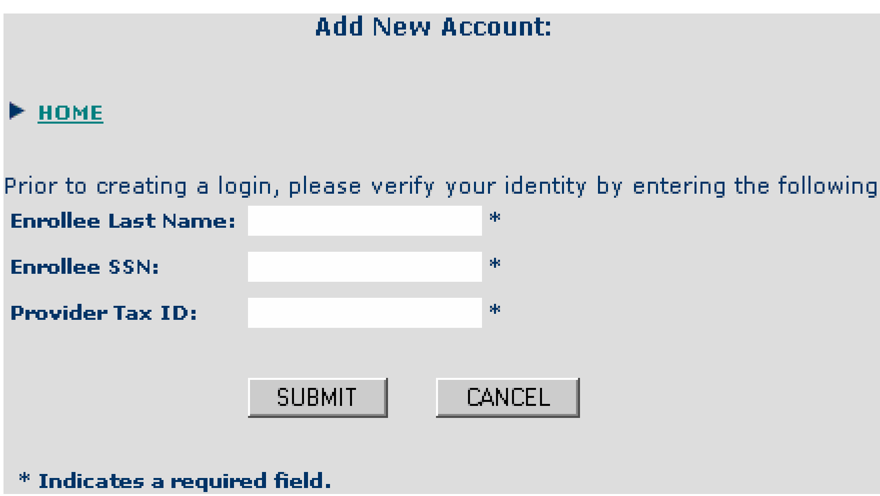
This section will detail how a provider can gain access to a payor's site to be able to upload claims and download reports.



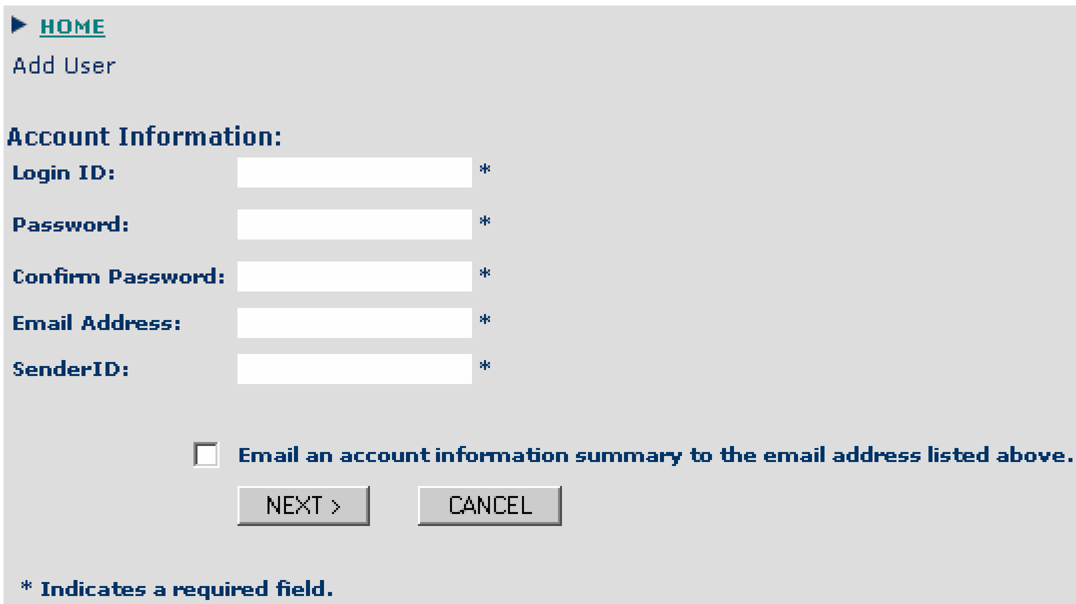
Getting a Login ID and Password

In order to access the site, you must first get a login ID and password. To do this, click on the hyperlinked HERE in the line below the Login to request a new account for the site. Click on the other HERE if you already set up an account, but have forgotten your password. You will be asked for your e-mail address. Enter the same e-mail address you used when setting up the account and click Send Password. You will be shown a message telling you that your password summary has been sent. If you already have a login ID and password, please skip the rest of this section.

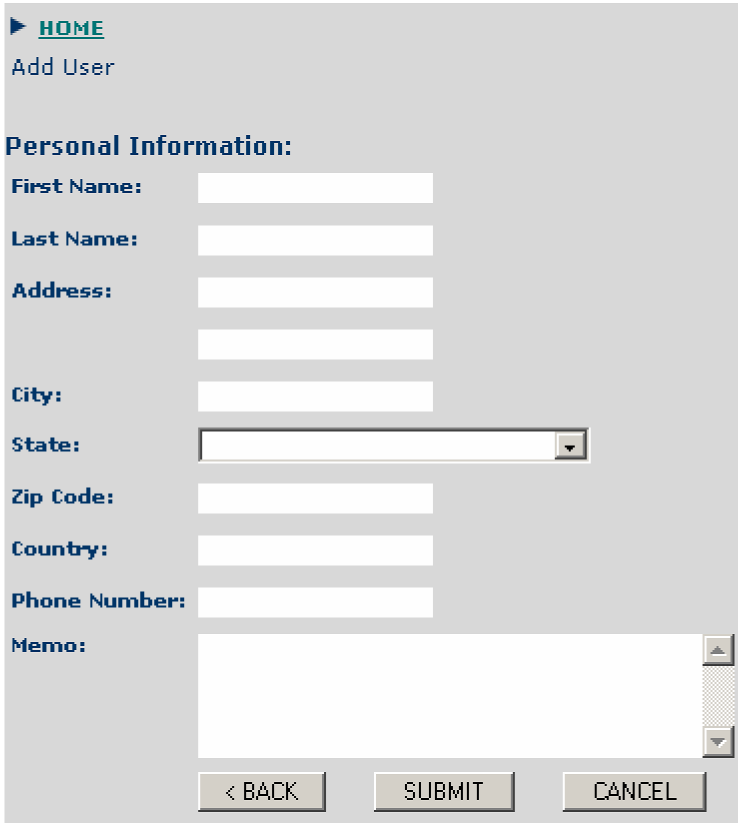
Add New Account



- **Enrollee Last Name:** Enter the last name of a patient you've treated who is an enrollee of this payor. This is for verification purposes.
- **Enrollee SSN:** Enter the social security number corresponding the enrollee whose last name you just entered.
- **Provider Tax ID:** Enter your tax ID.
- Click SUBMIT to continue to the **Account Information** screen.



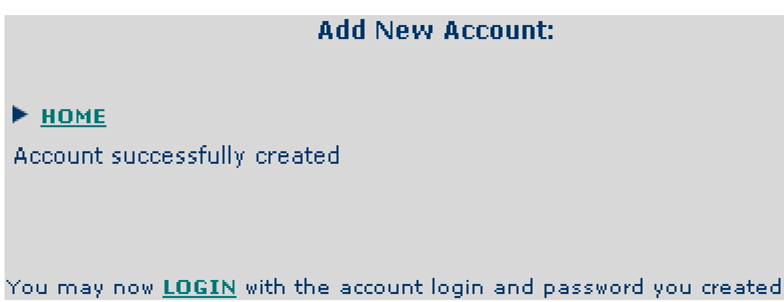
- **Login ID:** Enter the ID you wish to use for login purposes.
- **Password:** Enter the password you wish to use for login purposes.
- **Confirm Password:** Re-enter the password you entered above.
- **Email Address:** Enter your email address, even if you are not having a summary emailed to you. (See below.)
- **Sender ID:** This will be your tax ID number.
- Check the box labeled **Email an account information summary to the email address listed above** if you want your new login information emailed to you.
- Click NEXT > to move on to the **Personal Information** screen, or CANCEL if you wish to exit without setting up a new account.



- The fields on the Personal Information screen are optional. Please enter as much information as possible in order to further identify yourself.

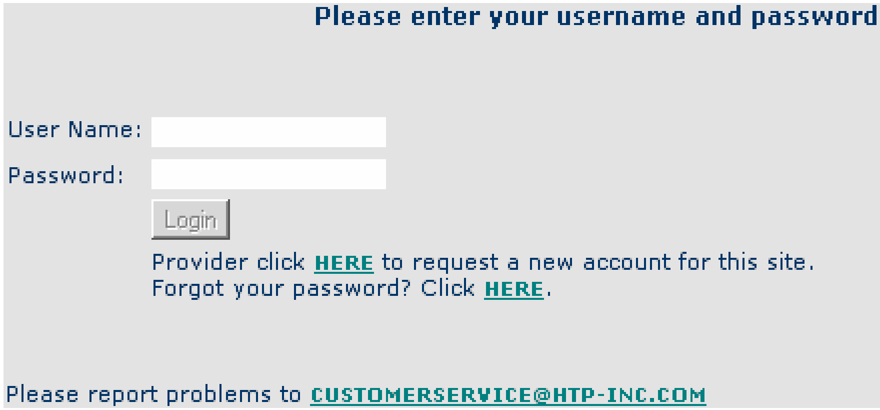
- Click < BACK if you wish to change your login information, SUBMIT if you wish to create the account now, with the information you entered, or CANCEL if you wish to exit without setting up a new account.

- HOME After clicking SUBMIT, you should see a screen similar to the one below. If you opted to have your account information e-mailed to you, it should arrive shortly. If you did not select this option, make sure to write this information down and keep it in a safe place.



- Click HOME or LOGIN to the login screen where you may now log in with your new user name and password.

Getting Started

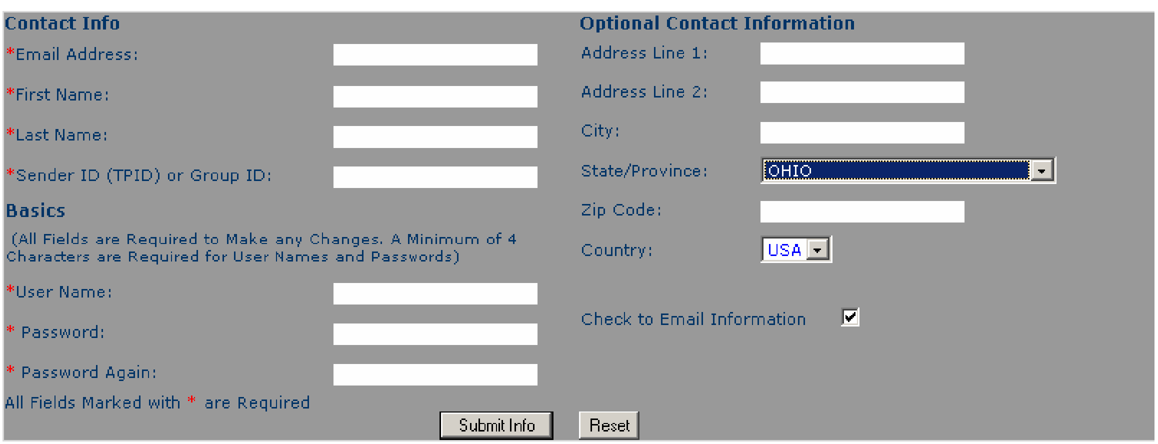


Logging In

Once you enter your User Name and Password, click Login. You will see a navigation bar on your screen like the one below.

Modify Profile

Click on Modify Profile in the navigation bar to bring up your personal profile.



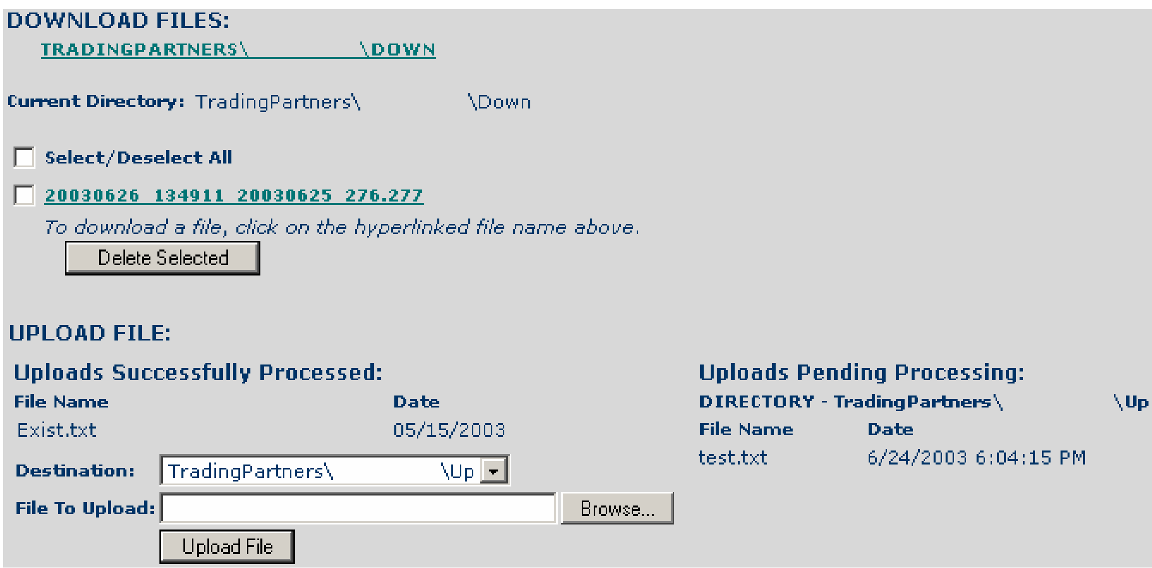
The information displayed is that which you entered when creating the account. Use this screen to verify or change required information, or to add to optional contact information. Instructions for updating this information follow. ***NOTE:*** If your e-mail address changes, or was entered wrong, be sure to change it here. If you forget your password, you will only be able to have it e-mailed to this address.

- Enter the desired information in the appropriate fields.
- If you want your updated information e-mailed to you, be sure to check the box labeled "Check to Email Information."
- If you make a mistake, click Reset to set all fields to their last saved state.
- Click Submit Info when you have finished, in order to save the changes you have made.

Upload/Download

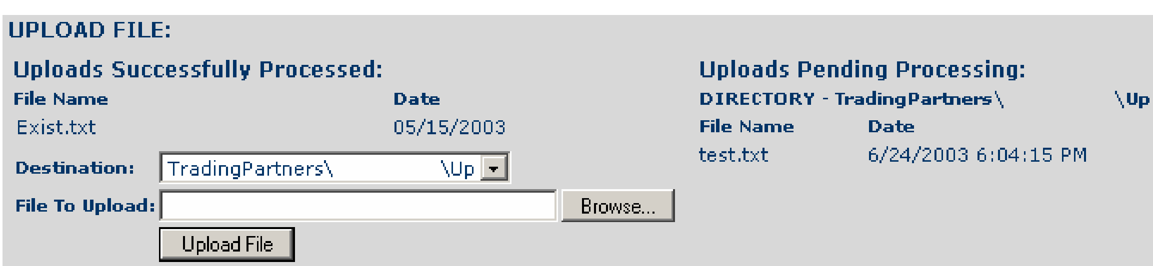
Purpose

This section will detail how to upload batch files for processing and how to download responses sent back by the payor.

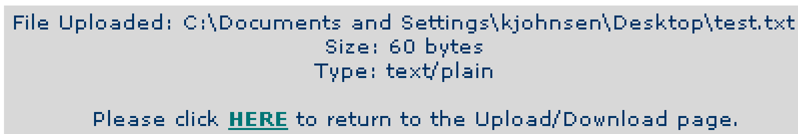


Upload

- Click on UPLOAD/DOWNLOAD in the navigation bar bring up a screen similar to the one above.



- Click Browse... to bring up a window that will let you choose the file to upload.
- Navigate to the file you wish to upload and either double-click on it, or click once to highlight it, then click Open.
- You will see the full path to the file you selected listed in the space to the left of the Browse... button.
- Click Upload File to send your file for processing.
- You should see a confirmation like the one below.



- Click on the link labeled HERE to return to the Upload/Download page.
- You will see your file listed on the right side of the screen under the heading **Uploads Pending Processing**, along with the date and time it was uploaded.
- Once your file has been processed, you will see it listed on the left side of the screen under the heading **Uploads Successfully Processed**, along with the date it was processed.

Download

- Downloading files is done using the upper portion of the Upload/Download screen.

- Beneath the words "DOWNLOAD FILES:" there will be a list of one or more directories where files will be stored.
- Clicking on the underlined directory will set it as the "Current Directory," below, displaying all files in the directory.
- If it is already the current directory, clicking on the link will refresh the list of available files for download.
- Clicking on an underlined filename will allow you to download that file.

- Clicking in the box to the left of any filename will put a check in the box allowing you to then delete the remote copy of that file by clicking Delete Selected.
- Clicking in the box to the left of **Select/Deselect All** will put a check in the boxes to the left of all filenames listed, allowing you to then delete them all by clicking Delete Selected.

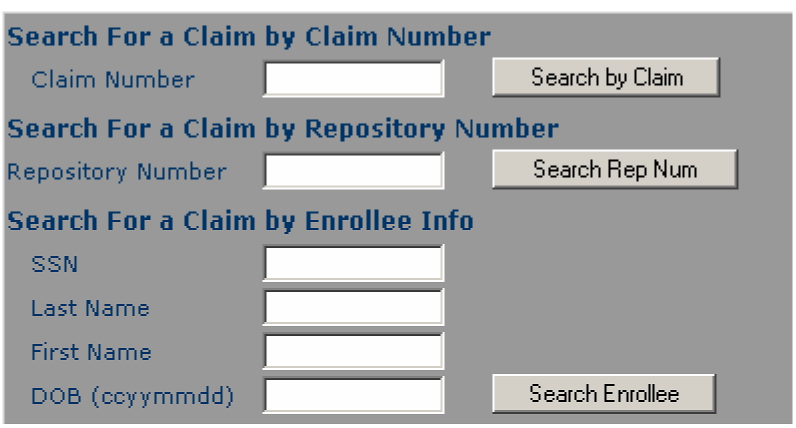
Inquiries

Purpose

The purpose of this section is to detail the methods available for checking into the status of individual claims and for checking into the eligibility of coverage for individual patients.

Claim Status

- The Claim Status screen is reached by clicking **CLAIM STATUS** in the navigation bar.
- The screen is divided into three sections:
    - Search For a Claim by Claim Number
    - Search For a Claim by Repository Number
    - Search For a Claim by Enrollee Info
- You will only be using one of these sections at a time, so filling out the boxes in all three sections is not necessary.



Search by Claim Number

- Enter the claim number in the box labeled "Claim Number" on the left.
- Click Search by Claim to see the results.

Search by Repository Number

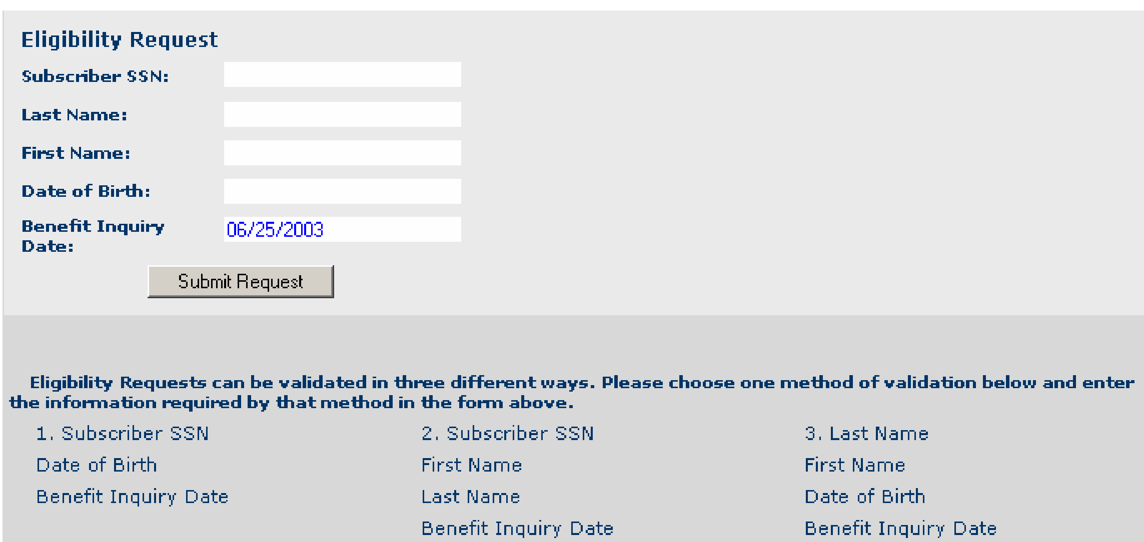
- Enter the repository number in the box labeled "Repository Number" on the left.
- Click [Search Rep Num] to see the results.

Search by Enrollee Info

- Enter the enrollee's social security number in the box labeled "SSN" on the left.
- Enter the enrollee's last name in the box labeled "Last Name" on the left.
- Enter the enrollee's first name in the box labeled "First Name" on the left.
- Enter the enrollee's date of birth in the box labeled "DOB" on the left. ***NOTE:*** This must be in ccyymmdd format.
- Click [Search Enrollee] to see the results.

Eligibility

- The Eligibility screen can be reached by clicking **ELIGIBILITY** in the navigation bar.
- Not all of the boxes need to be filled out for an eligibility inquiry, though certain combinations of boxes must be filled in for an inquiry to be successful.
- The three valid combinations are listed at the bottom of the screen, as shown below.



Eligibility Request

Subscriber SSN:

Last Name:

First Name:

Date of Birth:

Benefit Inquiry Date: 06/25/2003

[Submit Request]

Eligibility Requests can be validated in three different ways. Please choose one method of validation below and enter the information required by that method in the form above.

1. Subscriber SSN	2. Subscriber SSN	3. Last Name
Date of Birth	First Name	First Name
Benefit Inquiry Date	Last Name	Date of Birth
	Benefit Inquiry Date	Benefit Inquiry Date

- Enter the subscriber's social security number in the box labeled "Subscriber SSN" on the left.

- Enter the subscriber's last name number in the box labeled "Last Name" on the left.
- Enter the subscriber's first name in the box labeled "First Name" on the left.
- Enter the subscriber's date of birth in the box labeled "Date of Birth" on the left. ***NOTE:*** This must be in mm/dd/ccyy format.
- Enter the date the inquiry is for in the box labeled "Benefit Inquiry Date" on the left. ***NOTE:*** This defaults to the current date, which is all that is needed in most cases. It also must be in mm/dd/ccyy format.