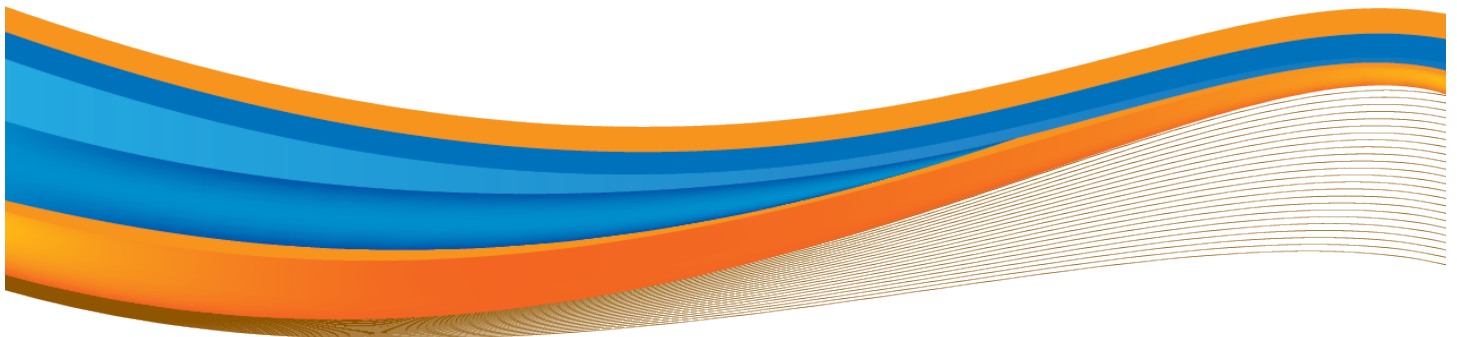




Common Practices for Claims Processing

Last reviewed: March 7, 2024



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Claims Processing Setup for DentalXchange

When setting up your institution to process claims through the DentalXchange clearing house, you may need to review and update a variety of settings in axiUm to avoid common errors.

Errors may be generated if any of the following are missing:

- Practice phone numbers
- Provider phone numbers
- Insurance EDI codes
- Provider dental and medical taxonomy codes
- EOB claim numbers
- Practice and/or insurance office Ids

We recommend that you install a series of views in axiUm and complete any necessary updates to avoid these errors.

Views

Install and Run Views in axiUm

To help identify potential issues before you begin submitting claims, you can install and run a series of views in your database. Depending on the results returned, you can then update the applicable places in axiUm.

Practice Phone Number View

The following view can indicate that the phone number may be missing from one or more practices:

```
CREATE
OR REPLACE
FORCE EDITIONABLE VIEW CLAIM_BLANK_PRAC_PHONE_V AS
SELECT "Name",
"Address1",
"Area",
"Phone",
"EDIOfficeId",
"Inactive"
FROM PRACTICE
WHERE 1=1
AND TRIM("Phone") IS NULL
AND TRIM("Area") IS NULL;
```

For information on updating practice phone numbers, see [Practice Phone Numbers](#).

Provider Phone Number View

The following view can indicate that the phone number may be missing from one or more billing doctor providers:

```
CREATE
OR REPLACE
FORCE EDITIONABLE VIEW CLAIM_BLANK_PROD_PHONE_V AS
SELECT "Producer",
"LastName" "Last Name",
"FirstName" "First Name",
"HomeArea" "Home Area",
"HomeTel" "Home Phone",
"BusinessArea" "Business Area",
"BusinessTel" "Business Phone",
"Inactive"
FROM PRODUCER
WHERE 1=1
AND "Type" IN (0,2)
AND TRIM("HomeArea") IS NULL
AND TRIM("BusinessArea") IS NULL
AND TRIM("HomeTel") IS NULL
AND TRIM("BusinessTel") IS NULL ;
```

For information on updating provider phone numbers, see [Provider Phone Numbers](#).

Insurance EDI Code View

The following view can indicate that the EDI code may be missing from one or more insurance companies:

```
CREATE
OR REPLACE
FORCE EDITIONABLE VIEW CLAIM_BLANK_INS_EDV AS
SELECT "Company",
"EDI",
"Name",
"Address1",
"Inactive"
FROM INSURANC
WHERE 1=1
AND "IsParent" = 0
AND
(
TRIM("EDI") IS NULL
OR LENGTH(TRIM("EDI")) < 2
);
```

Note: This script also identifies too short EDI codes that will be rejected. If found, you must extend their length within axiUm.

For information on updating EDI codes, see [Insurance EDI Codes](#).

Dental and Medical Taxonomy View

The following view can indicate that taxonomy codes may be missing from one or more billing doctor providers:

```
CREATE
OR REPLACE
FORCE EDITIONABLE VIEW CLAIM_BLANK_PROD_TAX_V AS
SELECT "Producer",
"LastName" "Last Name",
"FirstName" "First Name",
"ClaimSpecCode" "Dental Taxonomy Code",
"MedSpecCode" "Medical Taxonomy Code",
"Inactive"
FROM PRODUCER
WHERE 1=1
AND "Type" IN (0, 2)
AND
(
TRIM("ClaimSpecCode") IS NULL
OR TRIM("MedSpecCode") IS NULL
);
```

For information on updating taxonomy codes, see [Provider Dental and Medical Taxonomy Codes](#).

EOB Claim Number View

The following view can indicate that the EOB claim number may be missing from one or more claims:

```
CREATE
OR REPLACE
FORCE EDITIONABLE VIEW CLAIM_BLANK_EOBNUMBER_V AS
SELECT T."TreatmentDate" "Treatment Date",
T."Date" "Claim Date",
P."Chart",
T."Id",
T."Procedure",
T."Producer",
T."Deleted",
CE."EOBNumber" "EOB Number"
FROM CLAIMEOB CE,
TRX T,
PATIENT P
WHERE P."Patient" = T."Patient"
AND CE."Id" = T."Id"
AND CE."EOBNumber" IS NULL;
```

For information on updating EOB claim numbers, see [EOB Claim Numbers](#).

Insurance Office Id View

The following view can indicate that the office Id may be missing from one or more insurance companies:

```
CREATE
OR REPLACE
FORCE EDITIONABLE VIEW CLAIM_BLANK_INS_OFFID_V AS
SELECT "Company",
"EDI",
"Name",
"EDIOffId",
"Inactive"
FROM INSURANC
WHERE 1=1
AND TRIM("EDIOffId") IS NULL;
```

For information on updating insurance office Ids, see [Insurance Office Ids](#).

Practice Office Id View

The following view can indicate that the office Id may be missing from one or more practices:

```
CREATE
OR REPLACE
FORCE EDITIONABLE VIEW CLAIM_BLANK_PRAC_OFFID_V AS
SELECT "Name",
"Address1",
"EDIOfficeId",
"Inactive"
FROM PRACTICE
WHERE 1=1
AND TRIM("EDIOfficeId") IS NULL;
```

For information on updating practice office Ids, see [Practice Office Ids](#).

axiUm Setup


Practice Phone Numbers

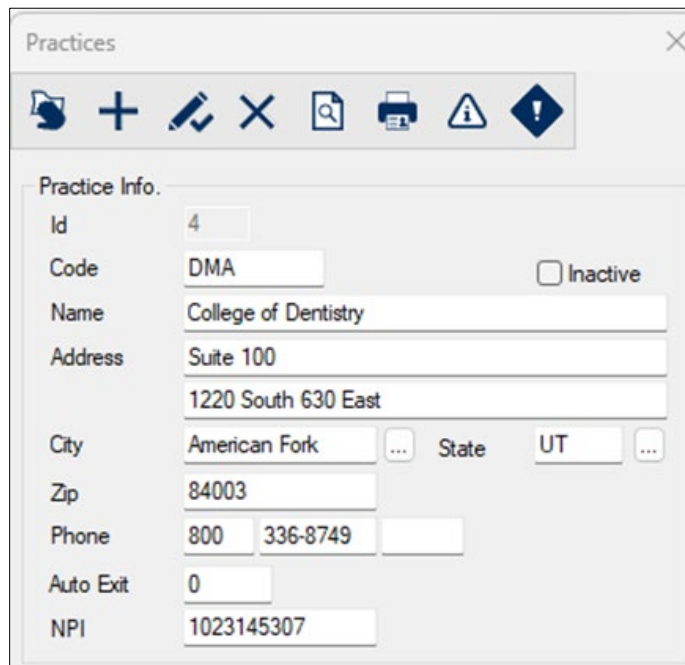
If the **Practice Phone Number View** indicates that the phone number may be missing from one or more practices, you must modify the practice to add a phone number or an area code.

You can modify the practices manually or using a script.

Important: *If you do not ensure a phone number or area is added, a PER~ segment error may be generated when claims are submitted for processing.*

Add Practice Phone Numbers Manually

1. Open Maintenance > **Office** > **Practices** to display the **Practices** window.
2. Select the correct practice.
3. In the **Phone** field, enter a number/area code and click the **Modify Record** () icon.



The screenshot shows a window titled "Practices" with a close button (X) in the top right corner. Below the title bar is a toolbar with icons for a folder, a plus sign, a pencil, a cross, a magnifying glass, a printer, a warning triangle, and a diamond with an exclamation mark. The main area is labeled "Practice Info." and contains the following fields:

Id	4	
Code	DMA	<input type="checkbox"/> Inactive
Name	College of Dentistry	
Address	Suite 100	
	1220 South 630 East	
City	American Fork	...
State	UT	...
Zip	84003	
Phone	800	336-8749
Auto Exit	0	
NPI	1023145307	

Run Script

If you want to set a phone number on all practices with a missing phone number at once, you can run the following SQL script:

```
update practice pr1
set pr1."Area" = nvl((select pr3."Area"
                      from (select
                          pr2."Area",
                          count(*)
                        from practice pr2
                        where 1=1
                        and trim(pr2."Area") is not null
                        group by pr2."Area"
                        order by
                          2 desc,
                          1) pr3
                      where 1=1
                      and rownum = 1), '0000')
where 1=1
and trim(pr1."Phone") is null
and trim(pr1."Area") is null;
```

Provider Phone Numbers

If the **Provider Phone Number View** indicates that the phone number may be missing from one or more billing doctor providers, you must modify the provider to add a phone number or an area code.

Important: *If you do not ensure a phone number or area is added, a PER~ segment error may be generated when claims are submitted for processing.*

You can modify the billing doctor providers manually or using a script.

Add Provider Phone Numbers Manually

1. Open Maintenance > **Office** > **Billing Doctors & Fee Schedules** to display the **Billing Doctors / Schedules List** window.
2. Double-click the correct provider to display the **Billing Doctors / Schedules** window.

3. In the **Home Phone** and **Bus. Phone** fields, enter a number/area code and click **OK**.

Billing Doctors / Schedules			
Name			
Prov. Type	\$	Billing ID	DENTIC
Title		<input type="checkbox"/> Inactive	
Last Name	Fees		
First Name	DentiCal		
Middle Name			
		OK	
		Cancel	
		Signature...	
Claim Information			
Billing Entity	<input type="radio"/> Organization <input checked="" type="radio"/> Provider		
Last Name	Training School		
First Name	Robins		
Address	Suite 100		
	1220 South 630 East		
City	American Fork	State	UT
Zip	84003	County	
Home Phone	800	336-8547	
Bus. Phone			
Name on Claim	Billing Entity		
Billing Info			
Fee Schedule	DENTIC	Dental Taxonomy Code	132300000X
License#	2087	Medical Taxonomy Code	132300000X
<input checked="" type="radio"/> SSN <input type="radio"/> TIN	*****754	Dental Specialty Code	301
UPIN-USIN Id		Medical Specialty Code	301
NPI	123451		
NPI (Type 2)			

Run Script

If you want to set a phone number on all providers with a missing phone number at once, you can run the following SQL script:

declare

```
vUserID users."User"%type := 0;
vStationID station."StationId"%type := -1;
vAuditHisID audithis."Audit"%type := 0;
vDate audithis."Date"%type := trunc(sysdate);
vTime audithis."Time"%type := (to_number(to_char(sysdate, 'HH24')) *
60) + to_number(to_char(sysdate, 'MI'));
vStep simple_integer := 0;
```

begin

```
--
-- enable dbms output
--

vStep := 10;
dbms_output.enable;

--
-- get overnight user
--

vStep := 20;
select a."OvernightUser"
into vUserID
from axiumopt a
where 1=1
and exists (select 1
            from users u
            where 1=1
            and u."Deleted" = 0
            and u."User" = a."OvernightUser");

--
-- make sure there is at least one PRODUCER record to update; do nothing if none
--

vStep := 30;
select 30
into vStep
from producer
where 1=1
and "Type" in (0, 2)
and trim("HArea") is null
and trim("BArea") is null
and trim("HTel") is null
and trim("BTel") is null
```

```

and rownum = 1;

--
-- establish a savepoint to rollback to in case there is any error encountered
--

vStep := 40;
savepoint spBeforeUpdateProducer;

--
-- get AUDITHIS ID
--

vStep := 50;
select audithis_audit_seq.nextval
into vAuditHisID
from dual;

--
-- insert into AUDITHIS
--

vStep := 60;
insert into audithis values
(
    vAuditHisID,
    vDate,
    vTime,
    vUserID,          -- audit user ID
    vStationID,       -- audit station ID
    'PRODUCER',
    2                 -- edit
);

--
-- update PRODUCER area codes
--

vStep := 70;
update producer prod1
set
    prod1."HArea" = nvl((select prod3."HArea"
                        from (select
                                prod2."HArea",
                                count(*)
                            from producer prod2
                            where 1=1
                            and trim(prod2."HArea") is not null
                            group by prod2."HArea"
                            order by
                                2 desc,
                                1) prod3
                        where 1=1

```

```

        and rownum = 1), '0000'),
prod1."BArea" = nvl((select prod5."BArea"
                    from (select
                        prod4."BArea",
                        count(*)
                    from producer prod4
                    where 1=1
                    and trim(prod4."BArea") is not null
                    group by prod4."BArea"
                    order by
                        2 desc,
                        1) prod5
                    where 1=1
                    and rownum = 1), '0000'),
    prod1."Audit" = vAuditHisID
where 1=1
and prod1."Type" in (0, 2)
and trim(prod1."HArea") is null
and trim(prod1."BArea") is null
and trim(prod1."HTel") is null
and trim(prod1."BTel") is null;
/*
--
-- save changes
--

vStep := 80;
commit;
*/

exception
when no_data_found then
    --
    -- do nothing (overnight user is not set in axiUm or no PRODUCER record to update)
    --
    --

    vStep := 90;
    null;

when others then
    --
    -- log error then rollback any changes
    --
    --

    vStep := 100;
    ax_pkg.LogEvent_P('UpdateProducerAreaCodes_P', trim(sqlerrm)||'
(Error at step '||vStep||')');
    rollback to spBeforeUpdateProducer;

```


end UpdateProducerAreaCodes_P;

Insurance EDI Codes

If the **Insurance EDI Code View** indicates that the EDI code may be missing from one or more insurance companies, you must modify the insurance company to add an EDI code.

Important: *If you do not ensure an EDI code is added, a PI~ segment error may be generated when claims are submitted for processing.*

You can modify the insurance companies manually or using a script.

Add Insurance EDI Codes Manually

1. Open Maintenance > **Insurance** > **Insurance Companies** to display the **Insurance Companies List** window.
2. Double-click the correct insurance company to display the **Insurance Company** window.
3. In the **EDI Code** field, enter an EDI code and click **Save**.

Tip: *06126 can be used as a default value when no EDI code is available for the payor or it is not a real payor, such as a non-participating payor.*

Insurance Company

Insurance Company
 Code AET ☐ Inactive
 EDI Code 06126 Office Id NOCD NPI 3334445566
 Name AETNA
 Address PO BOX 91555
 City ARLINGTON ... State TX ...
 Zip 76015 County
 Phone# 800 272-9556
 Contact
 Note

Settings

Contract Code HMO ...
 Service Type MEDI ...
 Default Fee LOCAL ...
 Co-pay Amt 0.00
 For Manual and 835 payments:
 Payment Process Auto transfer
 Adjust Code TRNSFB ...
 Unless Amount is below 2.00 then w-off
 Write-off Code FWO ...
 Over-pmt Process Transfer to pt
 Over-pmt Code TRNSFB ...
☐ 835 Intelli-Adj ☐ 835 Overrides...

Claims

Assignment Full
 Claim Form ADA12
 Pre-Auth ADA12
☐ Claim Inquiry
 Type of Cvg Dental
 Plan Type Medicaid
 ID Qualifier
 Medical Type
 Diag. code type ICD-10

Ortho Save
 Sites Close
 Form Text
 EDI Exempt Billing Numbers
 Exemptions Billing Definitions
 Pre-Auth Bill ID Overrides
 Oral Cavity Coverage
 Attachments EDI Overrides
 Advanced

EDI

EDI Claims Participating
 EDI Version X12N5010 Dental
 EDI Settings...

Contract Billing

☒ Contract Fees (Always)
☐ Office Fees (Up to Contract Fees)
☐ Bill \$0.00 if not covered
☒ Print Customary Total on Claims

Run Script

If you want to set an EDI code on all insurance companies with a missing EDI code at once, you can run the following SQL script:

```
update insuranc
set "EDI" = '06126'
where 1=1
and "IsParent" = 0
and trim("EDI") is null;
```

Provider Dental and Medical Taxonomy Codes

If the **Dental and Medical Taxonomy View** indicates that a taxonomy code may be missing from one or more billing doctor providers, you must modify the provider to add taxonomy code(s).

Important: If you do not ensure taxonomy code(s) are added, a PXC~ segment error may be generated when claims are submitted for processing.

You can modify the billing doctor providers manually or using a script.

Add Provider Dental and Medical Taxonomy Codes Manually

1. Open Maintenance > **Office** > **Billing Doctors & Fee Schedules** to display the **Billing Doctors / Schedules List** window.
2. Double-click the correct provider to display the **Billing Doctors / Schedules** window.
3. In the **Dental Taxonomy Code** and **Medical Taxonomy Code** fields, enter the correct codes and click **OK**.

The screenshot displays the 'Billing Doctors / Schedules' window, which is divided into several sections for entering provider information.

Name Section: Includes fields for Name, Prov. Type (set to \$), Billing ID (DENTIC), Title, Last Name (Fees), First Name (DentiCal), and Middle Name. There are checkboxes for 'Inactive' and 'Signature...'. Buttons for 'OK' and 'Cancel' are on the right.

Claim Information Section: Features a 'Billing Entity' section with radio buttons for 'Organization' and 'Provider' (selected). Below are fields for Last Name (Training School), First Name (Robins), Address (Suite 100, 1220 South 630 East), City (American Fork), State (UT), Zip (84003), Home Phone (800 336-8547), Bus. Phone, and Name on Claim (Billing Entity).

Billing Info Section: Contains fields for Fee Schedule (DENTIC), License# (2087), SSN (selected over TIN), UPIN-USIN Id, NPI (123451), Dental Taxonomy Code (132300000X), Medical Taxonomy Code (132300000X), Dental Specialty Code (301), and Medical Specialty Code (301).

EOB Claim Numbers

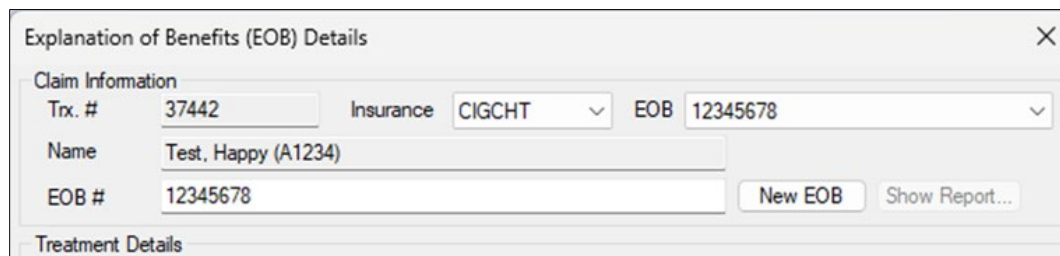
If the **EOB Claim Number View** indicates that the EOB claim number may be missing from one or more claims, you must modify the claim to add an EOB claim number.

Important: *If you do not ensure an EOB claim number is added, a REF*F8 segment error may be generated when the claim is submitted for processing.*

You can modify the claims manually or using a script.

Add EOB Claim Numbers Manually

1. Open the EDI module and click the **Submitted Procedures** tab.
2. Search for the problematic claim.
3. Right-click the claim and select **EOB Details...** to display the **Explanation of Benefits (EOB) Details** window.
4. In the **EOB #** field, enter the correct claim number and click the **Modify Record** (✎) icon.



Explanation of Benefits (EOB) Details			
Claim Information			
Trx. #	37442	Insurance	CIGCHT
			EOB 12345678
Name	Test, Happy (A1234)		
EOB #	12345678		New EOB Show Report...
Treatment Details			

Insurance Office Ids

If the **Insurance Office Id View** indicates that the office Id may be missing from one or more insurance companies, you must modify the insurance company to add an office Id.

Important: *If you do not ensure an office Id is added, a REF*FY~ segment error may be generated when claims are submitted for processing.*

You can modify the insurance companies manually or using a script.

Add Insurance Office Ids Manually

1. Open Maintenance > **Insurance** > **Insurance Companies** to display the **Insurance Companies List** window.
2. Double-click the correct insurance company to display the **Insurance Company** window.

3. In the **Office Id** field, enter the Id code and click **Save**.

Note: *NOCD* should be used instead of blank.

The screenshot shows a software window titled "Insurance Company" with a close button (X) in the top right corner. The window is divided into several sections:

- Insurance Company Section:** Contains fields for Code (AET), Office Id (NOCD), NPI (3334445566), Name (AETNA), Address (PO BOX 91555), City (ARLINGTON), State (TX), Zip (76015), Phone# (800 272-9556), Contact, and Note. There is an "Inactive" checkbox.
- Settings Section:** Contains fields for Contract Code (HMO), Service Type (MEDI), Default Fee (LOCAL), Co-pay Amt (0.00), Payment Process (Auto transfer), Adjust Code (TRNSFB), Unless Amount (2.00), Write-off Code (FWO), Over-pmt Process (Transfer to pt), Over-pmt Code (TRNSFB), and checkboxes for "835 Intelli-Adj" and "835 Overrides...".
- Claims Section:** Contains fields for Assignment (Full), Claim Form (ADA12), Pre-Auth (ADA12), Claim Inquiry (checkbox), Type of Cvg (Dental), Plan Type (Medicaid), ID Qualifier, Medical Type, and Diag. code type (ICD-10).
- EDI Section:** Contains fields for EDI Claims (Participating) and EDI Version (X12N5010 Dental), with an "EDI Settings..." button.
- Contract Billing Section:** Contains radio buttons for "Contract Fees (Always)" (selected) and "Office Fees (Up to Contract Fees)", a checkbox for "Bill \$0.00 if not covered", and a checked checkbox for "Print Customary Total on Claims".
- Buttons:** On the right side, there are buttons for "Ortho", "Save", "Sites", "Close", "Form Text", "EDI Exempt", "Billing Numbers", "Exemptions", "Billing Definitions", "Pre-Auth", "Bill ID Overrides", "Oral Cavity", "Coverage", "Attachments", "EDI Overrides", and "Advanced".

Run Script

If you want to set **NOCD** on all insurance companies with a missing office Id at once, you can run the following SQL script:

```
UPDATE
INSURANC
SET "EDIOffId" = 'NOCD'
WHERE 1=1
AND TRIM("EDIOffId") IS NULL
AND "IsParent" = 0;
```

Practice Office Ids

If the **Practice Office Id View** indicates that the office Id may be missing from one or more practices, you must modify the practice to add an office Id.

Important: If you do not ensure an office Id is added, a REF*G5~ segment error may be generated when claims are submitted for processing.

Add Practice Office Ids Manually

1. Open Maintenance > **Office** > **Practices** to display the **Practices** window.
2. Select the correct practice and click the **Practice Options** (△) icon to display the **Practice Options** window.
3. In the **Office Id** field, enter the correct Id and click **OK**.

Note: Please contact axiUm Support to receive this ID.

The screenshot shows the 'Practice Options' dialog box with the following sections and settings:

- Patient Options**
 - Default patient type: [Empty field] ... Req'd Fields...
 - ☒ Default Accept Assignment when adding patients
 - ☒ Using Trojan lookup for insurance information
 - Chart ordered by last: Letters of chart# [4]
 - User definable sort order: Length of chart# [0]
 - Chart [Empty field] Pattern [Empty field]
 - External chart sort function: Function GETCHARTSORT
- Recall Settings**
 - Recall Status when associated appointment is:
 - Booked: SCHD
 - Unbooked: UNSCHD
 - Checked In: COMPLT
- EHR Options**
 - Pop up lab sublist when treatment is:
 - ☒ Planned
 - ☐ Completed
 - ☐ Not applicable
 - Use SOAP Notes: Yes (not the default)
 - Use Template Notes: Yes (not the default)
 - ☒ Show headings when selecting notes
- Patient Electronic Signature Options**
 - ☒ Required for treatment estimates
 - ☒ Required for payment plan contracts
 - ☒ Warn if changes made to plan schedule (plan edits always warn)
 - ☒ Required for treatment plan contracts
- EDI Settings**
 - Office ID: 123456 Medicaid...
 - Prefix / Login: ax/axium
 - Password: password
- Transaction Options**
 - Default Billing ID: \$PREDO Pre Doctorate Fees Overrides...
 - Facility: FP Faculty Practice
 - NEA Facility: FP
 - ☐ One discipline per claim
 - Warn if Discipline is not entered: Yes (for I/C txs)
 - ☒ Treatment Tx Status considered inactive
 - as: STALE after 120 days
 - use: RECT to re-activate treatment from Tx History
 - ☒ Prompt for Tx Status when re-activating treatment
 - ☐ Payment discounts
 - ☒ Auto batch claim upon Patient Approvals
 - ☐ Financial warning on Auto batch claim error
 - ☒ Add Patient sticky note on Auto batch claim error
 - ☒ Patient Balance includes Payment Plan Transactions
 - Tax Rate: 5.00 %
 - Bill total amount at start of In Process: No
 - Insurance co-assignment override by: Billing doctor
- Messenger Auto Message**
 - ☒ When assigning patient
 - ☒ When lab order in / out
- Ortho Settings**
 - Ortho Visit Procedure Code: [Empty field] ...
 - Ortho Appointment Code: [Empty field]
- Lab Tracking**
 - ☐ Bill patient the lab charge total from the lab order
 - Patient balance checks: Both
- Auto Note**
 - When: ☒ In Progress ☒ Complete ☒ Redo ☒ Reopen

Buttons: OK, Cancel