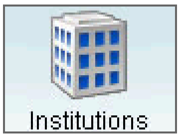
Optomate
Premier Series

Using Online Claiming with Optomate Premier

The following instructions are for Online Claiming with Medicare and DVA.

Account Setup
When creating an account to send through Online Claiming, you will need to define which Institution is being billed in the [Charge To] column for each line item. Do this by selecting the Institution from the drop-down list in the Charge To field. If the institution is not in the drop-down menu, you will need to go into the Institutions module from the main screen and add them in.

You must ensure that the correct Optometrist and Branch are defined on the account before trying to create a batch. This is because Optomate creates a batch based on the Branch and Optometrist information.



Batching
Access the **Institutions** module by clicking on the icon (as shown) from the main screen.

1. Click on the [Preview Batch] button at the top of the screen and choose the relevant **Institution**, **Optometrist** and **Branch**, then click on [Preview].

   Check that the list on screen is correct (by matching your DB4 forms). If you have anyone on the list that was seen by a different Optometrist or the Medicare Item number billed was incorrect, cancel the report and return to the Patient's Account, and fix it.

   Preview the batch again. If you are sure that the report is correct, print and keep with the DB4 forms, which you retain in the practice for future Auditing/history purposes.

   If there is a Medicare number missing, or any other personal details, exit and then fix in the Patient’s screen.

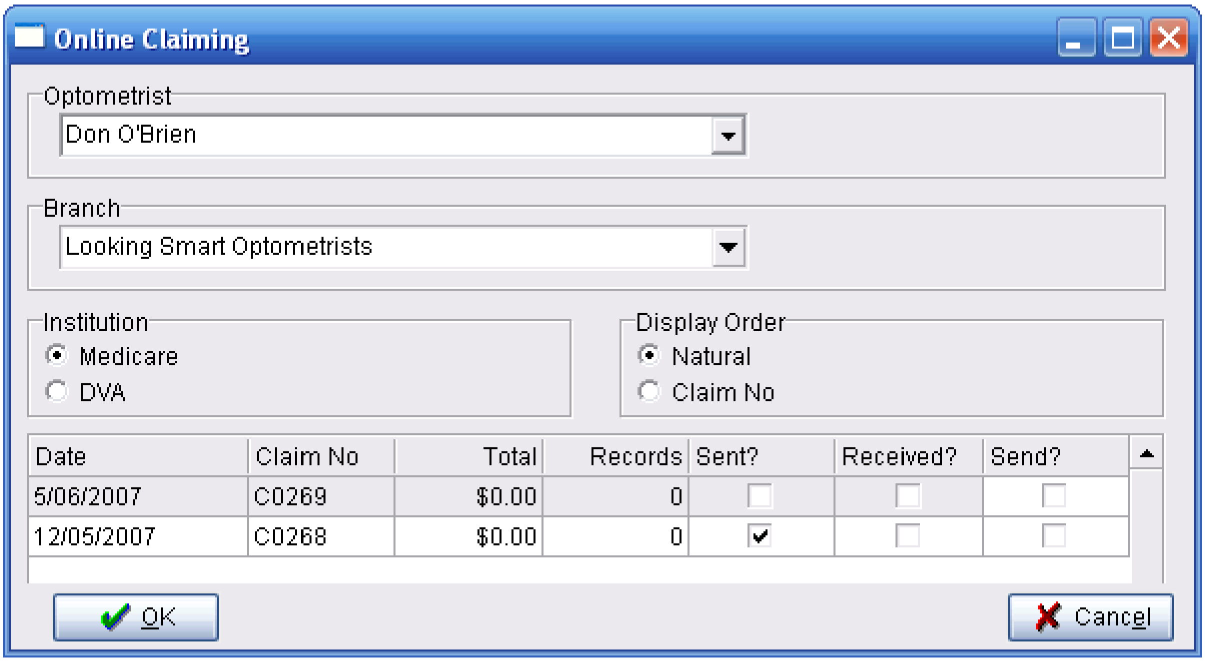
2. Next click on the [Create Batch] button at the top of the Institutions screen. Again select the correct Institution, Optometrist and Branch. A Claim Number will be allocated (overtype this number with the number given from your Healthpoint unit, if alternatively used).
   Select OK and the Batch will be created.

   NOTE: Online Claiming has a restriction of 80 claims per Batch, so a second Batch will need to be created if you have more than 80 accounts waiting to be batched.

3. Make sure your computer is connected to the Internet. If you are using iKeys ensure that the correct Optometrists’ iKey is inserted into the computer.

   If you have Firewall software installed on your computer, and you are receiving a “No ISP found” error while trying to transmit data to HIC, temporarily disable your firewall and try again. If the transmission is now successful, you will either need to change a setting in your firewall to allow the transmission in future, or disable each time you transmit.
   Re-enable once transmission have completed.

4. Click on **Online Claiming ▶ Send** at the top of the Institutions screen.
   - Select the appropriate Optometrist, Branch and Institution.
   - Tick the 'Send?' checkbox for all of the batches you want to send, then click [OK].



If you have not entered your Location Pass phrase into system settings you will be prompted to enter it now. (To avoid having to enter this each time you send or receive, add it into System Settings. Go to: **File ▶ System Settings** then select **Online Claiming** from the left menu.)

If you have an iKey you will then be prompted for your Individual pass phrase, and when entered correctly it will then begin to send.

Receiving information from Online Claiming
HIC Online sends you Exception information (problems with claims submitted) as well as notification of funds deposited into your account. First you have to retrieve the data:

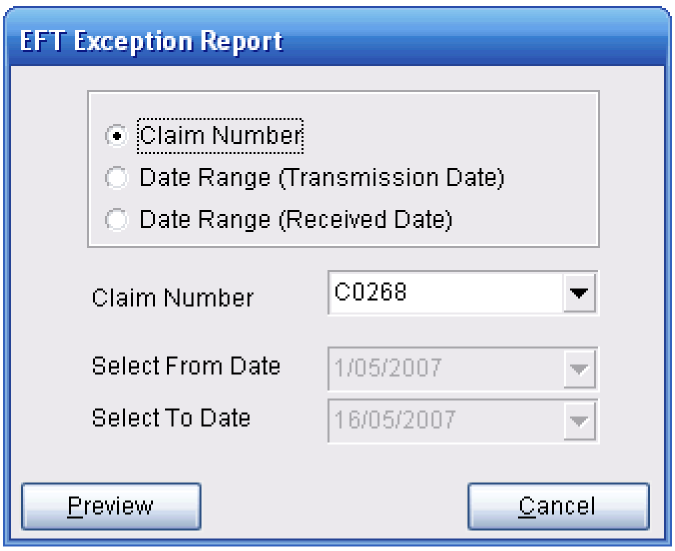
1. Make sure you are connected to the Internet and if using iKeys then ensure you have the correct iKey inserted, as you did when transmitting claims.

2. From the Institutions screen click on **Online Claiming ▶ Receive**. You will be prompted for the Location pass phrase (if not entered in system settings). Data will be retrieved from HIC, however you need to view the following two reports to see the data.

EFT Exception Report

Between 24 – 48 hours after sending the claim, Exceptions are made available for you to take appropriate action. You must first Receive Data from the Online Claiming though, as in the section above.

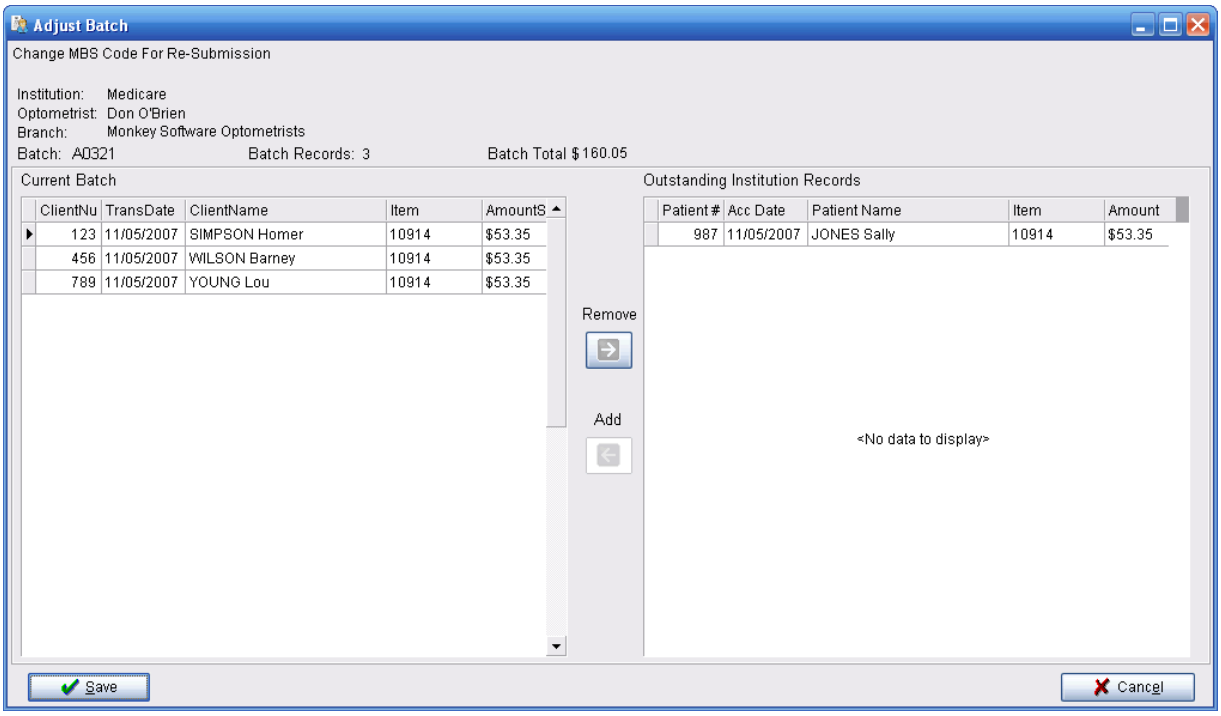
To receive an EFT Exception Report, from the Institutions screen go to:
Online Claiming ▶ Receive ▶ EFT Exception Report



You can do a report for a single batch by selecting the Claim Number, or show a list of batches for a selected date range (showing perhaps, several Batches). Exceptions are noted per Batch. If you are unsure as to the reason for the item being rejected, you may need to contact HIC.

Adjusting a Batch, after an Exception

► Click on the [Adjust Batch] button from the Institutions screen.
Enter the Batch claim number then click [OK].



The adjust batch screen will present you with people that are currently in the batch on the left and people that are waiting to be put into a batch on the right.

► To remove a person from the batch, simply select that account from the left (ensure the arrow cursor is pointing to the correct item) and then press the Remove button. Click Save and then 'Yes'.

Items that have been removed from the Batch are now outstanding and waiting to be batched again, however, you need to take action first, depending on the Exception:

1. If the Medicare Item code needs to be changed, click on the [Change MBS Code For Resubmission] button, adjust the item code and Save.
2. If the Exception was due to an incorrectly spelt Patient Name or incorrect Medicare details, adjust the information in the Patient's screen.

When you create your next Batch, these corrections will be in the Batch, ready for submission again.

TIP: If you would like a revised report of a Batch after modifications, go to:
Reports ► Institutions ► Batch Report from the main screen.

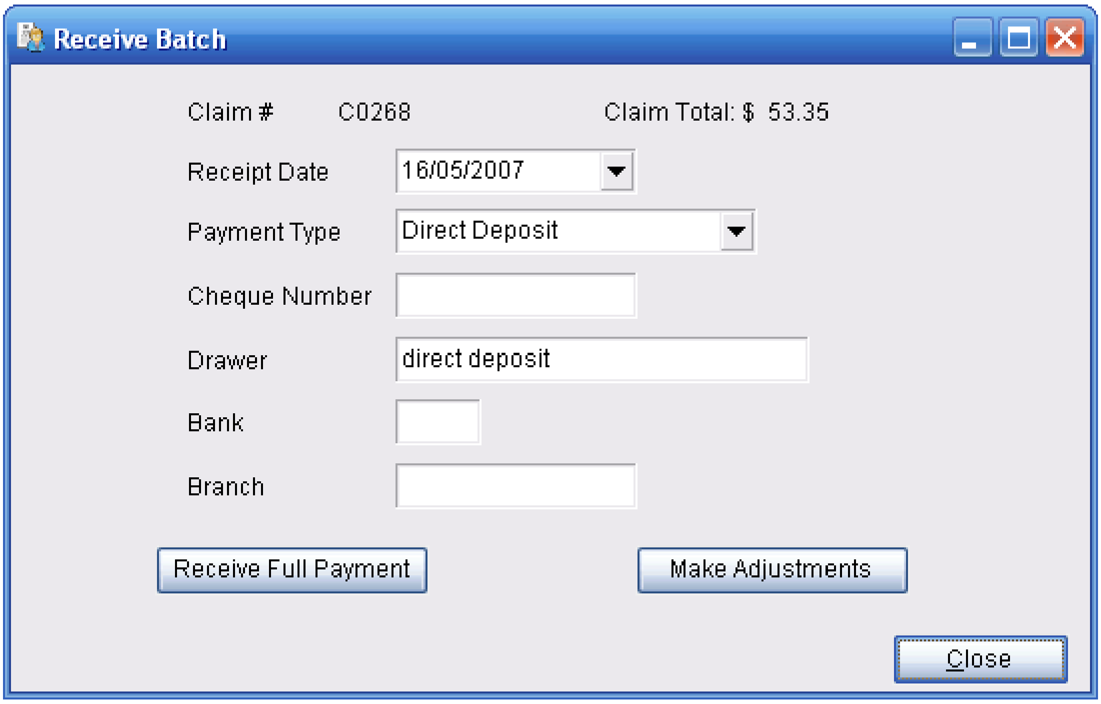
EFT Report

To receive an EFT Report, from the Institutions screen go to:
Online Claiming ▶ Receive ▶ EFT Report.
Select a date range, and any deposits made into your account will be shown, identifying which batches were paid in each deposit.

*You must have received data prior to printing, otherwise there will be no information to print.

Receiving Payment for a Batch, once it appears on the EFT Report

1. Click on the [Receive Batch Payment] button on the institutions screen.
   Enter the Batch number and click [OK].



2. Select the Payment Type (i.e. Eftpos or Direct Deposit) and any other Bank details where necessary. Click on [Receive Full Payment] then answer ‘Yes’ to pay and ‘Yes’ if you want the payment to appear on today's Banking.

Changing your Password/Location Pass phrase

If you have been sent a new Location Certificate with a new Password, please refer to our help note “Updating Online Claiming Certificates”.