How to Add or Change a Billing Agent and Other Claim Submission Options in NCTracks

Overview

This user guide provides step-by-step instructions for adding or changing a billing agent or making other claim submission options in NCTracks. Providers have several options for processing claims and sending/receiving electronic transactions in NCTracks. Providers will configure these options and settings using the Manage Change Request application.

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Logging into the Provider Portal

1. Navigate to www.nctracks.nc.gov

2. The following page will display. Click the Providers tab at the top of the page.

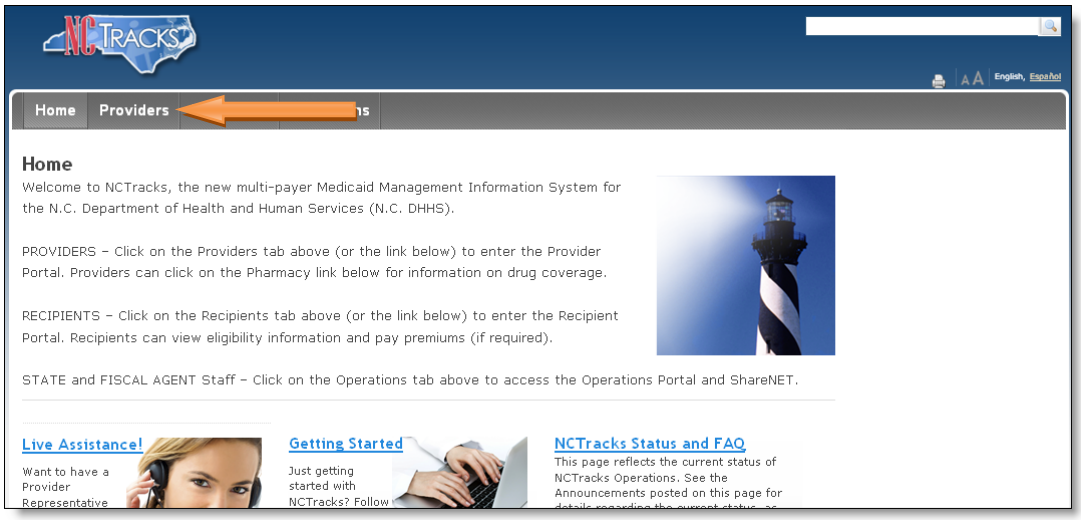

Figure 1: NCTracks Home

3. From the **Providers** page, click the NCTracks Secure Portal icon.

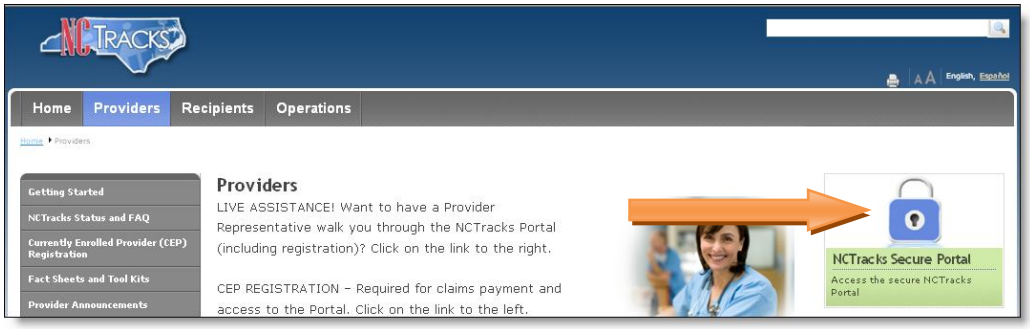

Figure 2: Providers Page

4. The following login screen will display. Enter the NCID and password and click the **Log in** button.

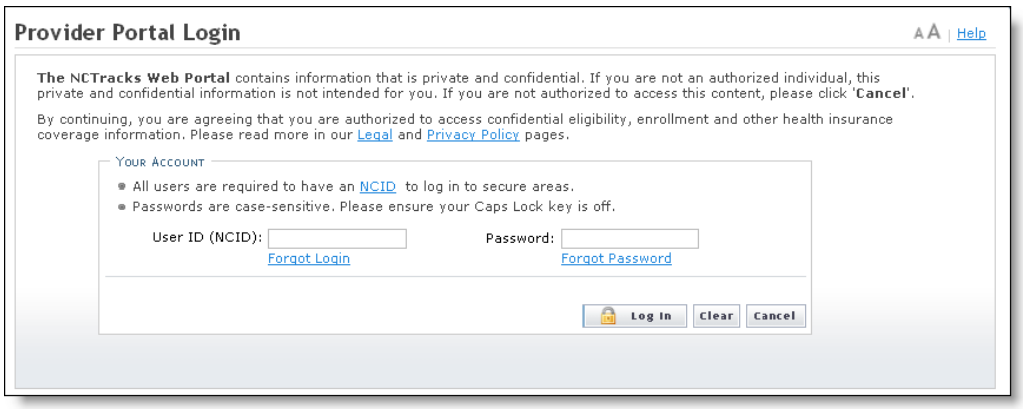

Figure 3: Provider Portal Login

Accessing the Manage Change Request Application

5. The following Providers page will display. Click the **Status and Management** button.

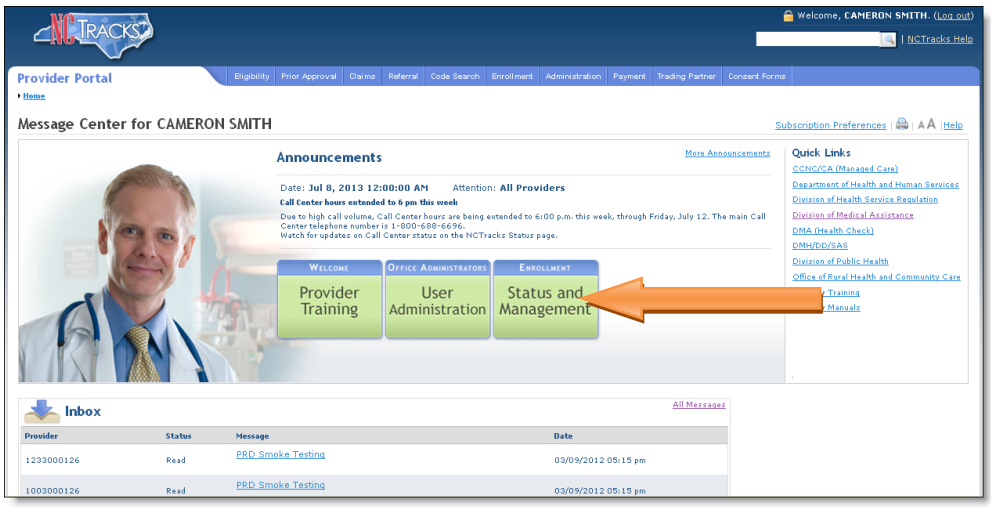

Figure 4: Select Status and Management

6. The **Status and Management** screen will display. The screen is divided into 6 sections.

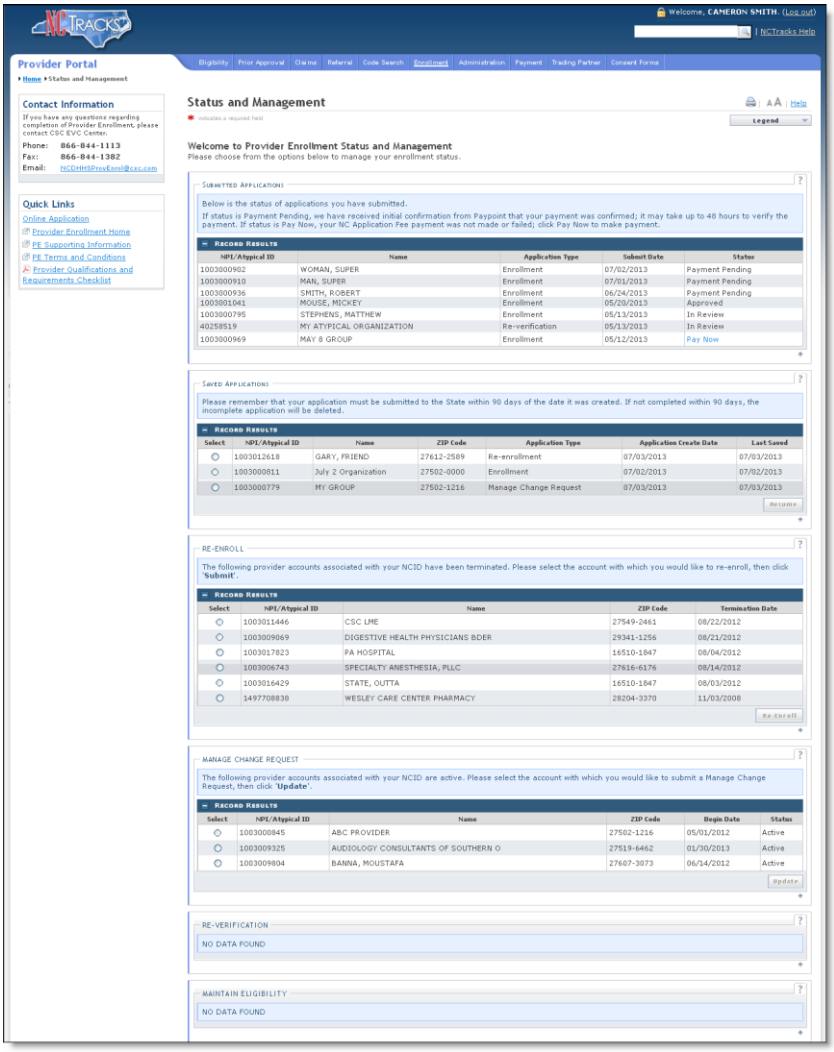

Figure 5: Status and Management Page

Status and Management Sections

1. **Submitted Applications**: Contains enrollment applications or change requests that have already been submitted and are currently in process.

2. **Saved Applications:** Contains enrollment applications or change requests that have been started but not yet submitted. Please remember that your application must be submitted to the State within 90 days of the date it was created. If not completed within 90 days, the incomplete application will be deleted.

3. **Re-enroll**: This section will list provider accounts associated with the user's NCID that have been terminated. The user can select the account to re-enroll, then click 'Submit'.

4. **Manage Change Request:** This section will list provider accounts associated with the users NCID that are active.

5. **Re-verification:** This section allows the user to submit a required re-verification application for a provider enrollment account.

6. **Maintain Eligibility:** This section allows the user to submit a required maintain eligibility application for a provider enrollment account.

7. To begin a new **Manage Change Request**, under the **Manage Change Request** Section, click the radio button next to the NPI to be changed. Next, click the **Update** button.

	If the Manage Change Request section reads **No Data to Display**, it is possible that a Manage Change Request has already been created and/or submitted, but not yet approved. Check the **Submitted Applications** and **Saved Application**s sections for a Manage Change Request/Enrollment that is already in process.

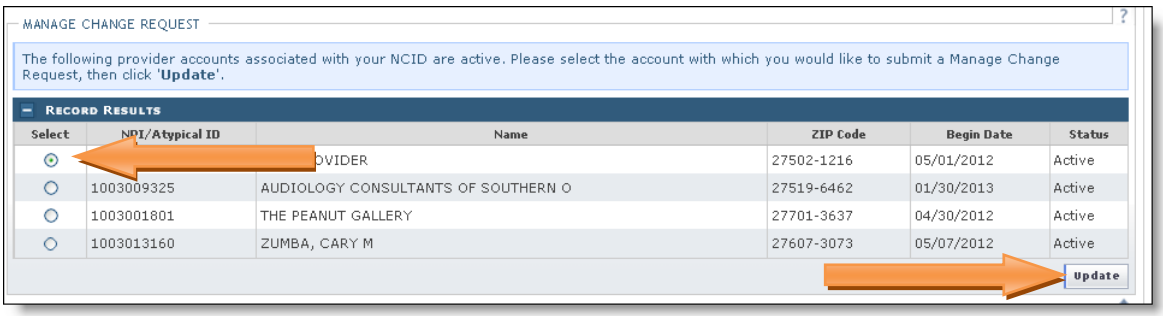

Figure 6: Select Manage Change Request

8. The **Organization Basic Information** screen will display. The left hand side menu will display a list of topics.

	Do NOT click the menu options on the left hand side of the screen, as each page must be accessed/reviewed before the **Manage Change Request** can be submitted. Instead, to navigate to appropriate section, click the **Next** button on the bottom right corner of the screen until you reach the **Addresses** screen.

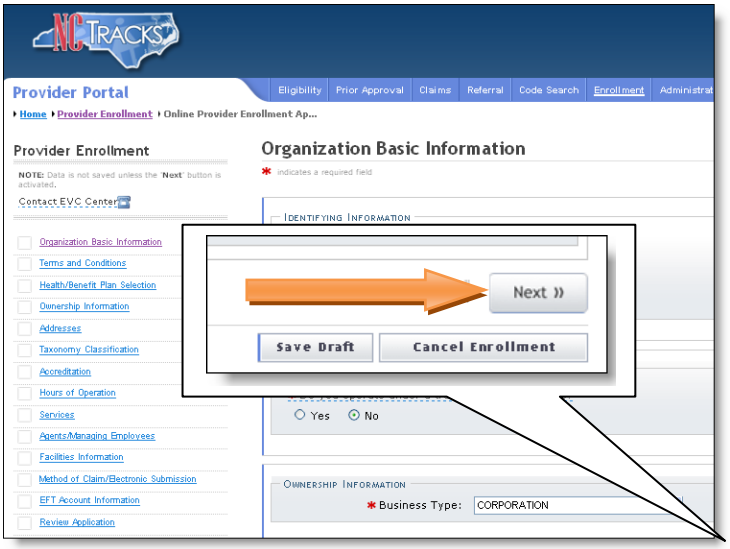

Figure 7: Organization Basic Information Page

9. On the Terms and conditions page, to attest and accept Medicaid Terms and Agreements, click the check box and click the **Next** button.

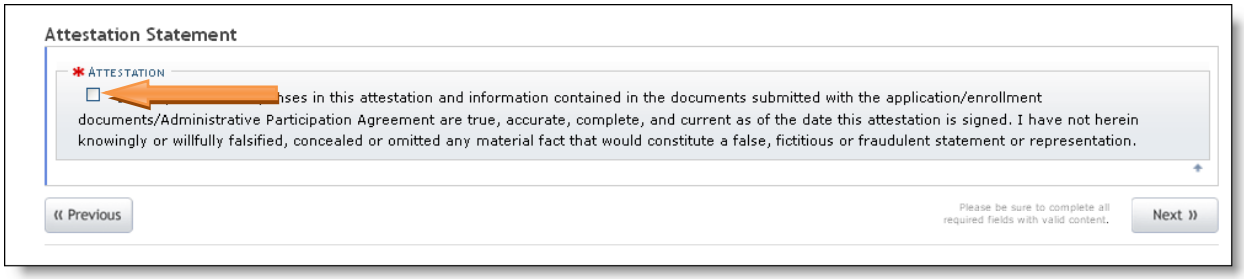

Figure 8: Attestation Statement

10. Once you reach the **Method of Claim and Electronic Transactions** page, read the following information carefully, as each menu option can dictate how electronic transactions are sent and received.

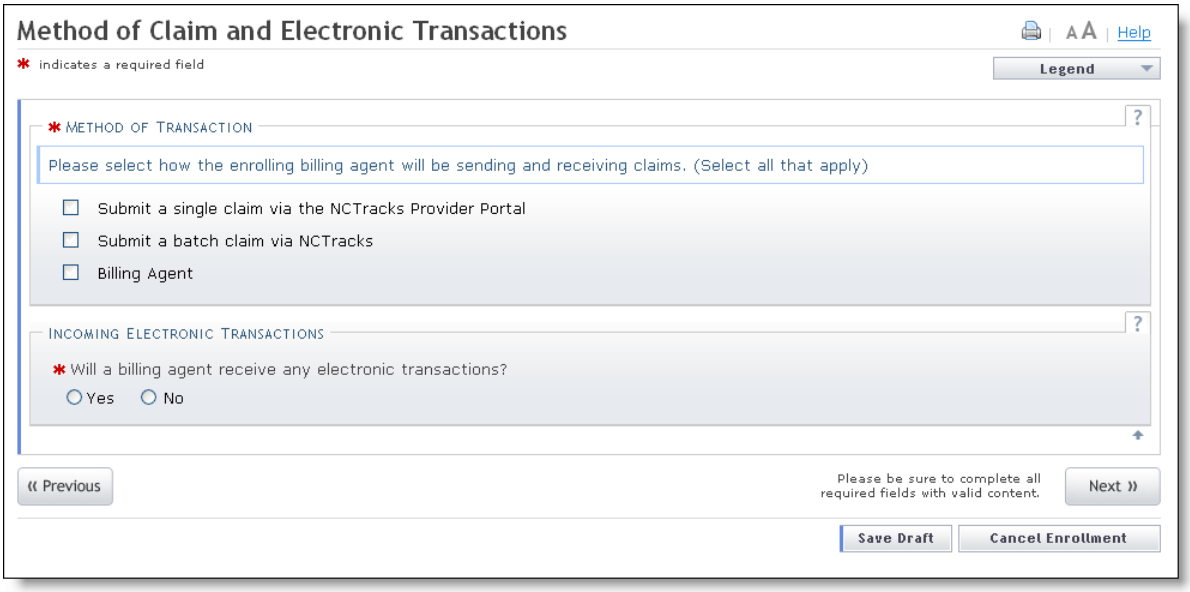

Figure 9: Method of Claim and Electronic Transactions

Submitting Single Claims on Behalf of Yourself or another Provider

If you intend on submitting single, individual claims on behalf of yourself or another provider, select the first option titled “Submit a single claim via the NCTracks Provider Portal”.

	If you do not intend on sending or receiving batch claims or electronic transactions, do NOT select the Batch Claims or Billing Agent Options

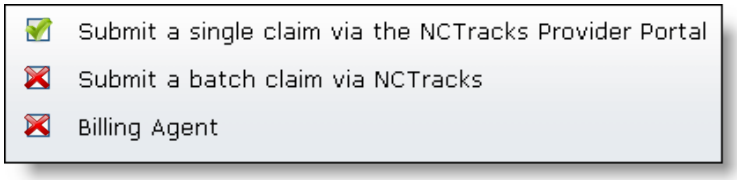

Figure 10: Select Single Claim Option Only

Click here to view the steps for completing the Manage Change Request.

Batch Claims and other Electronic Transaction Types

The following electronic transactions and corresponding responses can submitted through the NCTracks Provider Portal.

There are two main types of transactions:

Inbound: Transactions sent from the billing agent/TP/provider into NCTracks are considered Inbound Transactions.

Outbound: Transactions sent from NCTracks to the billing agent/TP/provider are considered outbound transactions.

Transaction #	Transaction Type	Description
270	Inbound	Inquiry request sent by the provider, billing agent or trading partner to NCTracks to check eligibility benefits of a recipient
271	Outbound	Response sent from NCTracks to the billing agent, trading partner or provider regarding recipient eligibility benefits request when a 270 electronic inquiry has been received
276	Inbound	Inquiry request sent to NCTracks to check claims status
277	Outbound	Response sent from NCTracks to a billing agent, trading partner or providers regarding the claim status request when a 276 electronic inquiry has been received.
820	Outbound	Response from NCTracks to the billing agent/TP/provider regarding payroll deducted and other Group Premium Payment for Insurance Products/payment remittance advise for 834 transaction.
834	Inbound	Benefit enrollment and maintenance
835	Outbound	Response sent from NCTracks to the billing agent/TP/provider regarding Health Care Claim Payment/ Remittance Advice
837P	Inbound	Electronic Batch Claims (Professional) sent by the billing agent/TP/provider to NCTracks
837I	Inbound	Electronic Batch Claims (Institutional) sent by the billing agent/TP/provider to NCTracks
837D	Inbound	Electronic Batch Claims (Dental) sent by the billing agent/TP/provider to NCTracks

Transaction #	Transaction Type	Description
999	Outbound	The 999 is used to return functional acknowledgement for all electronic batch transactions submitted, including 837 claims, 276 Claim Status Request, 270 Eligibility or Benefit Inquiry, and 834 Benefit Enrollment and Maintenance file submissions. In addition, it reports X12 compliance errors and whether the received transaction(s) were rejected or accepted.

Submitting Batch Claims/Electronic Transactions

If you intend on submitting batch claims, or exchange other types of electronic transactions with NCTracks on behalf of yourself or other provider(s), there are several setup steps required. These steps are usually performed by the office administrator or user administrator.

Please note that this process is still required even if you only intend on receiving the 835 Health Care Claim Payment/ Remittance Advice

1. User Provisioning and Mailbox Creation Steps

In order to access the X12 transactions, the OA will need to assign the appropriate user role to each user that will need access to the 835 mailbox. In addition, these users must be assigned to at least one group.

a. From the **Home** screen, click the **User Maintenance** button.

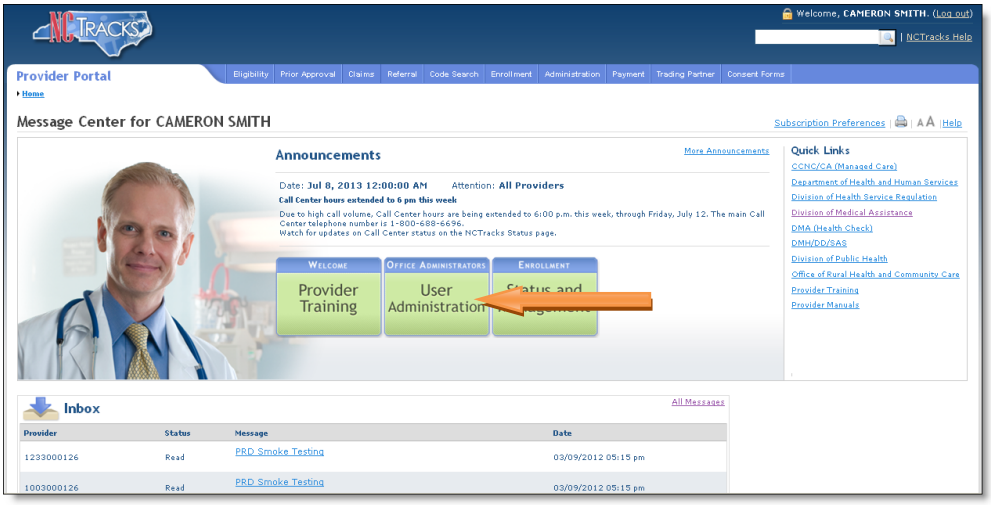

Figure 11: Home - Select User Maintenance

b. The **User Maintenance** screen will display.
c. In the **Search Criteria** window, enter the user's last name in the Last Name field.
d. Click the **Search** button.
e. The search results will appear below the Search Criteria window. To open the **Edit User** window, double click on the user ID hyperlink.
f. Scroll down to locate the **Access Rights** window on the lower right hand side of the screen.
g. Availed roles to be added, will be listed in the Available Roles pane.
h. To add user roles, highlight the applicable role and click the **Add** button to move the role to the right side pane titled Assigned Roles. The following roles should be added:
   – ***Claims***
   – ***Outbound-IND-4010-835***
   – ***Outbound-IND-5010-835***
i. Click the **Save** button to save the changes.

2. Complete the Manage Change Request - Trading Partner Registration

To register as a Trading Partner, you will need complete the Manage Change Request process. On the **Method of Claim and Electronic Transactions** page, and click the option titled "Submit a batch claim via NCTracks".

	Do NOT select the "Billing Agent" option if you do not use a billing agent. For instructions on using a billing agent click here.

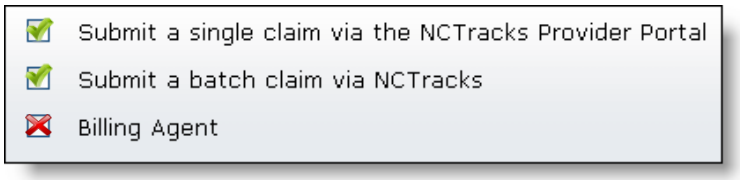

Figure 11: Select Single Claim and Batch Claim Options

STOP	**At this time, the Transaction Supplier Number (TSN) is generated. Proceed to the end of the application. At the REVIEW screen, click the REVIEW APPLICATION button to review the application so that you may write down the TSN number as it is needed for the next step.**

Click here to view the steps for completing the Manage Change Request.

CONTINUED ON THE NEXT PAGE

3. Complete and Submit the Trading Partner Contact Document

The MCR must be in an **Approved** status before the next step can be completed. Once the MCR is approved, complete the **Trading Partner Contact Document**, which can be access from the NCTracks portal at the following link.

https://www.nctracks.nc.gov/content/public/dms/public/doc/contactdocument072413.docx

Complete all the fields on the form.

- Remember to include your TSN number on the form.
- For the type of sender, select from the following options:

Type of Sender	Description
Provider	– Sends/receives EDI transactions on behalf of their own organization
Clearinghouse	– Transfers EDI transactions for a provider – Translates the provider data into the required format – Accepts multiple types of claims and sends them to various payers including Medicare – Accepts EDI transactions from payers for routing to and/or reformatting for providers – Performs general and payer-specific edits on claims, and usually handles all of the transactions for a given provider – Frequently reformats data files to submit to various payers and manage response reports including acknowledgements, edit reports, and remittance advices
Billing Service	– Collects the provider's claim information and creates the electronic claim to bill to the appropriate insurance companies, including Medicare – May provide claims billing services only or provide full financial accounting and/or other services – May view beneficiary or provider data to perform their obligations to the provider, if the provider designates them for that access – Must submit initial claims on the provider's behalf in order to quality as a billing service.

- Select the type(s) of transactions that will be sent/received
  - Institutional Claims 837I □
  - Professional Claims 837P □
  - Dental Claims 837D □
  - Eligibility Inquiry 270/271 □
  - Claims Inquiry 276/277 □
  - Benefit Enrollment and Maintenance 834 □
  - Electronic Remittance 835 □ (Testing is not required)

- Email the completed form to NCMMIS_EDI_Support@CSC.COM

Once the form is received, the EDI Team will update the provider record in the Operations portal to enable the provider to receive the 835 transactions. No testing is required to complete this setup. Once the provider setup is complete, the EDI team will notify the provider via email.

4. Complete Transaction Testing

If you intend on submitting electronic transactions to NCTracks, you will need to submit test transactions to ensure that the transactions are compliant with HIPAA standards. Plan ahead, as this can take some time. For detailed instructions regarding testing, please reference the companion guides located at the following link.

https://www.nctracks.nc.gov/content/public/providers/provider-trading-partners.html

The NCTracks Trading Partner Connectivity Guide provides screen shots and steps for submitting batch claims. Reference the following link to view this guide.

https://www.nctracks.nc.gov/content/public/dms/public/pdf/companion-guides/NCTracks_Trading_Partner_Connectivity_Guide_V3.pdf

Using Billing Agent(s) or Trading Partner(s)

a. If you intend on using one or more billing agents or TPs to submit claims or send and receive all electronic transactions, select the third option. It is recommended that you also select the first option, to allow you to submit a single claim if needed.

   With this option, the billing agent/TP sends and receives all transaction types

	For this configuration, do **NOT** select the Batch Claim option. If you select this option, the billing agent/TP will **NOT** receive the outbound transactions such as the 835 Health Care Claim Payment/ Remittance Advice). This option, by default routes the 835 transaction to the provider in lieu of the billing agent/TP.

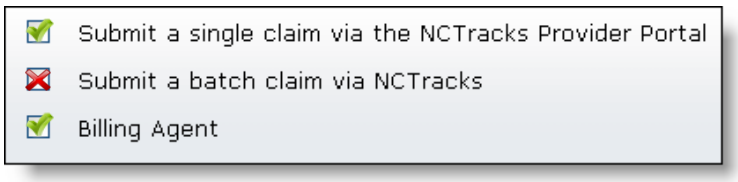

Figure 12: Select Single Claim Option Only

b. The **Associate Billing Agent** page will display. To link the provider to a billing agent or clearinghouse, click the **Yes** radio button.

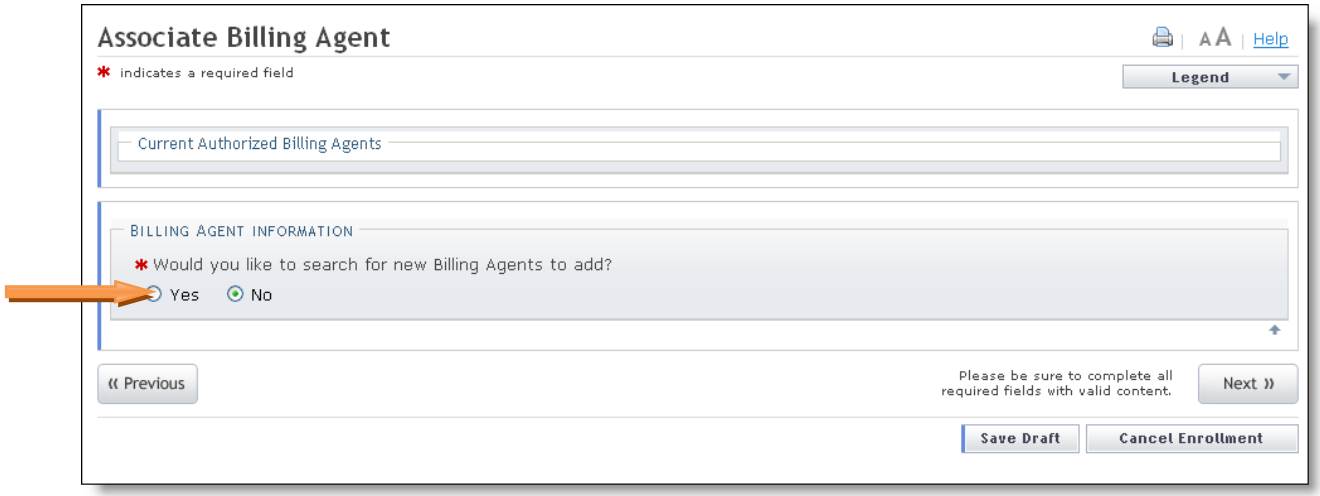

Figure 13: Associate Billing Agent

c. The **Search** window will display. Enter the Billing Agent ID, Last Name/First Name or Organization name. Click the **Search** button to search for a billing agent.

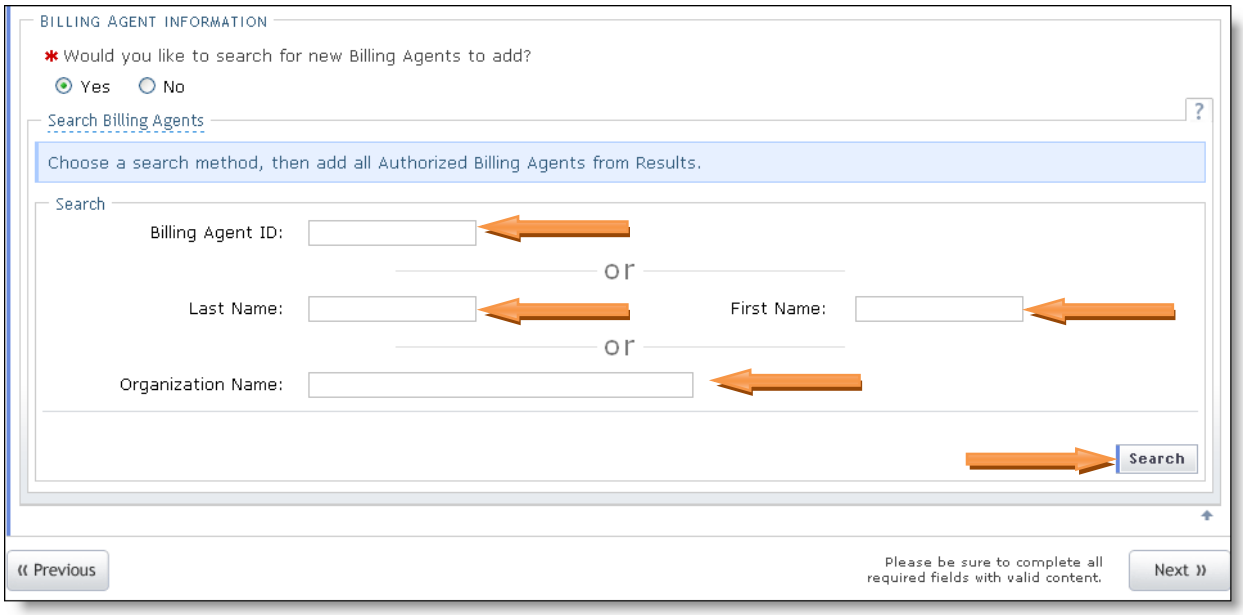

Figure 14: Billing Agent Information

d. The search results will display. Click the radio button next to the appropriate billing agent, and click the **Add** button to link the provider to the billing agent.

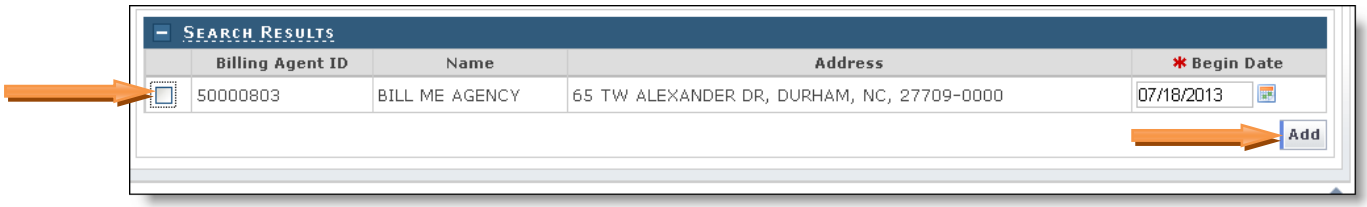

Figure 15: Billing Agent Search Results

e. The Selected Authorized Billing Agents screen will display.

	If you are using multiple billing agents or TPs, you may specify that each billing agent/TP handle, manage or receive different types of electronic transactions. For example, you may designate one billing agent to process all professional claims (837P Transactions), while designating the other billing agent/TP to receive the remittance advices (835 transactions). Reference the attached screen shots to assign/designate different transaction types for multiple billing agents/TPs. Otherwise, click the **Next** button.

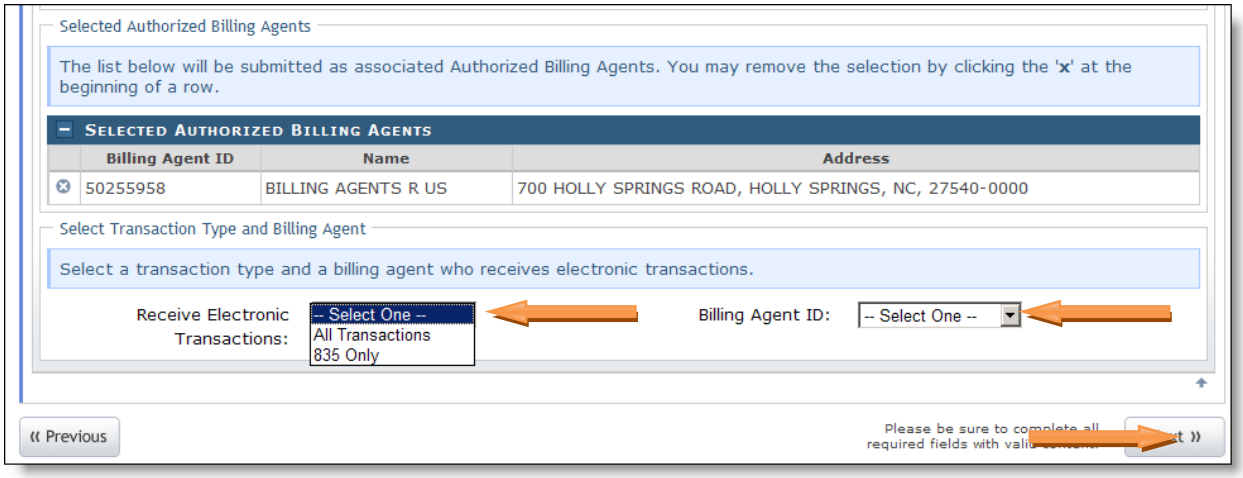

Figure 16: Designate Transactions to Billing Agent

Click here to view the steps for completing the Manage Change Request.

CONTINUED ON THE NEXT PAGE

Submitting Batch Claims in Conjunction with using Billing Agent(s)/Trading Partner(s)

Some providers select both the “Batch Claim” and “Billing Agent” options. The benefit of this configuration is that the billing agents/TPs can be setup to submit the inbound transactions, such as batch claims into NCTracks, while the outbound transactions such the Remittance Advices can route directly to the provider.

To complete this configuration, your provider will need to register as a trading partner and complete other steps. Click here for the complete process to register as a trading partner.

For additional information on the Trading Partner/Provider registration and testing, please reference the companion guides located at the following link:

https://www.nctracks.nc.gov/content/public/providers/provider-trading-partners.html

a. If you intend on using one or more billing agents/TPs to submit claims or send and receive other electronic transactions but would also like to receive the batch outbound transactions such as the remittance advices, select all three options.

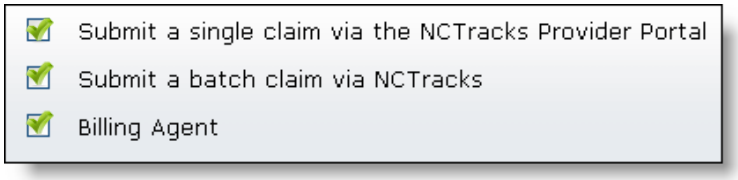

Figure 17: Select Single Claim Batch Claim and Billing Agent Options

b. The **Associate Billing Agent** page will display. To link the provider to a billing agent or clearinghouse, click the **Yes** radio button.

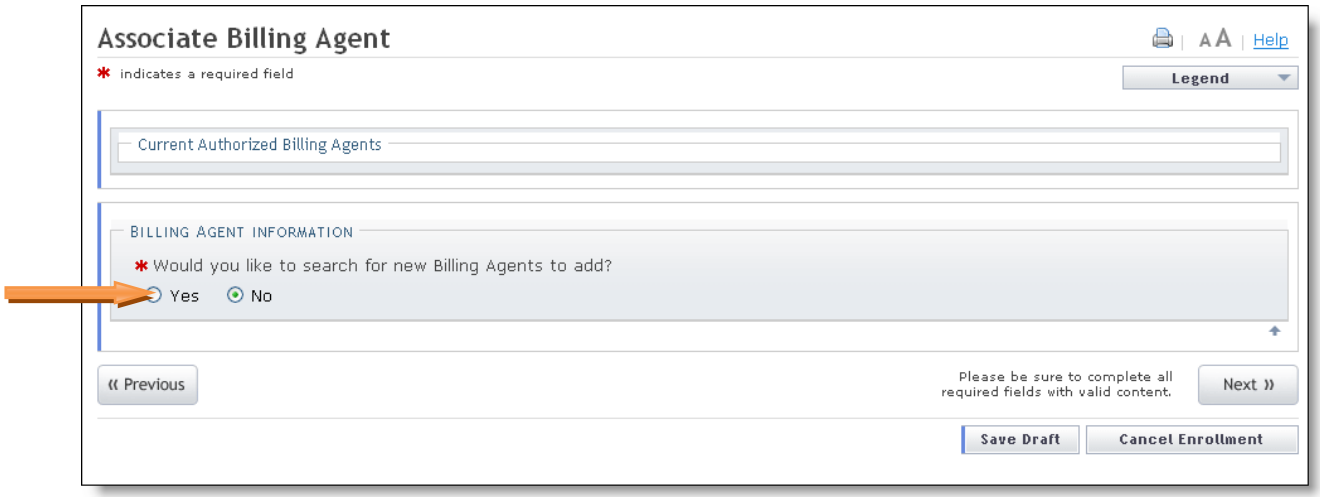

Figure 18: Associate Billing Agent

c. If you selected **Yes** to add a billing agent, the **Search** window will display. Enter the Billing Agent ID, Last Name/First Name or Organization name. Click the **Search** button to search for a billing agent.

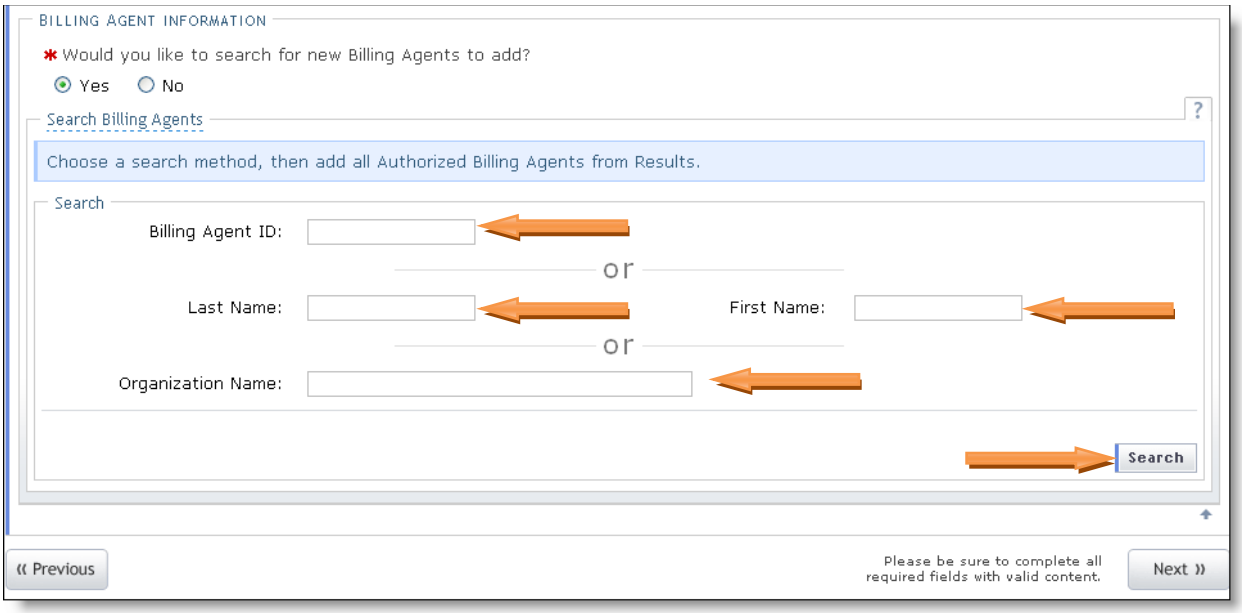

Figure 19: Billing Agent Information

d. The search results will display. Click the radio button next to the appropriate billing agent, and click the **Add** button to link the provider to the billing agent.

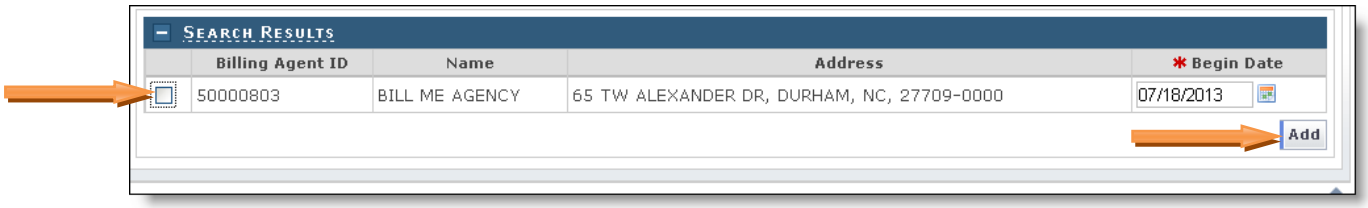

Figure 20: Billing Agent Search Results

f. The Selected Authorized Billing Agents screen will display.

	If you are using multiple billing agents or TPs, you may specify that each billing agent/TP handle, manage or receive different types of electronic transactions. For example, you may designate one billing agent to process all professional claims (837P Transactions), while designating the other billing agent/TP to receive the remittance advices (835 transactions). Reference the attached screen shots to assign/designate different transaction types for multiple billing agents/TPs. Otherwise, click the **Next** button.

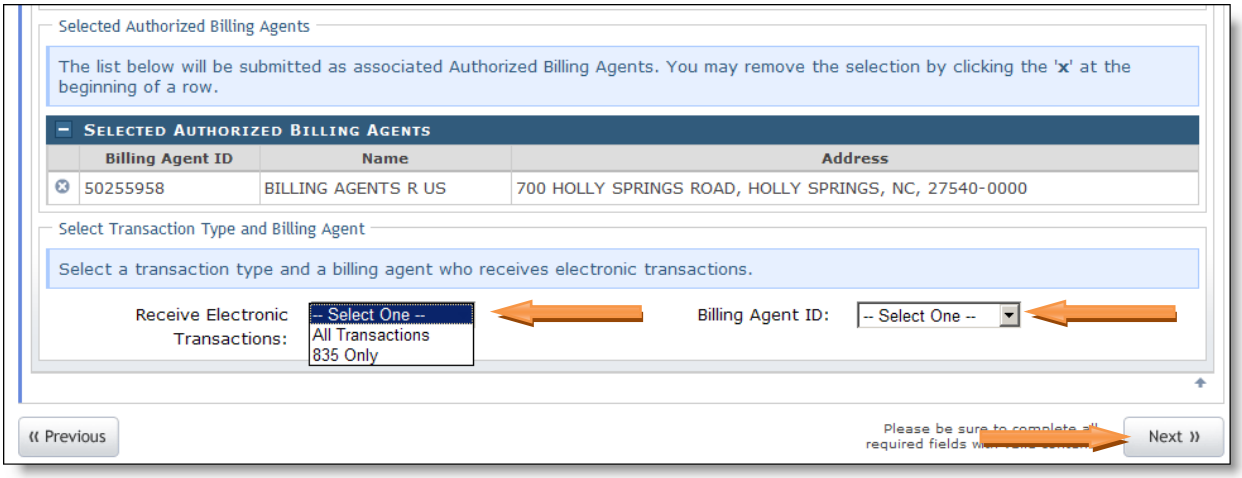

Figure 21: Designate Transactions to Billing Agent

Completing the Manage Change Request

11. Continue to click the next button through the Change Request application until you reach the Terms and Conditions page.

	The **Save Draft** button will only save your progress and will not submit the Change Request for processing.

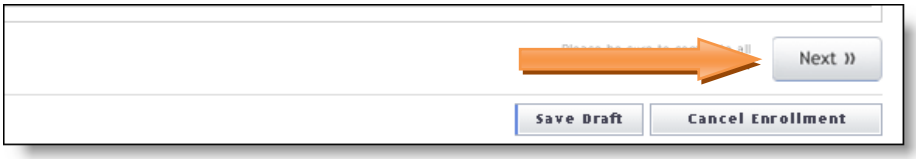

Figure 22: EFT Account Information Click Next

12. The Review Application screen will display. On the left hand margin, verify that all application pages have a green check mark next to each page. In addition, verify the contact email address listed on the page. This can be updated on the **Basic Information** page.

STOP	**If you have selected the "Batch Claims" option, you must click the REVIEW APPLICATION button so that you may write down the TSN number as it is needed to complete the Trading Partner Registration process.**

To review the application in Adobe PDF format, click the **Review Application** button. If you have successfully completed all required information for your provider enrollment application and are satisfied the information is complete and accurate, Click the **Next** button to proceed to the **Attachments/Submit Electronic Application** page.

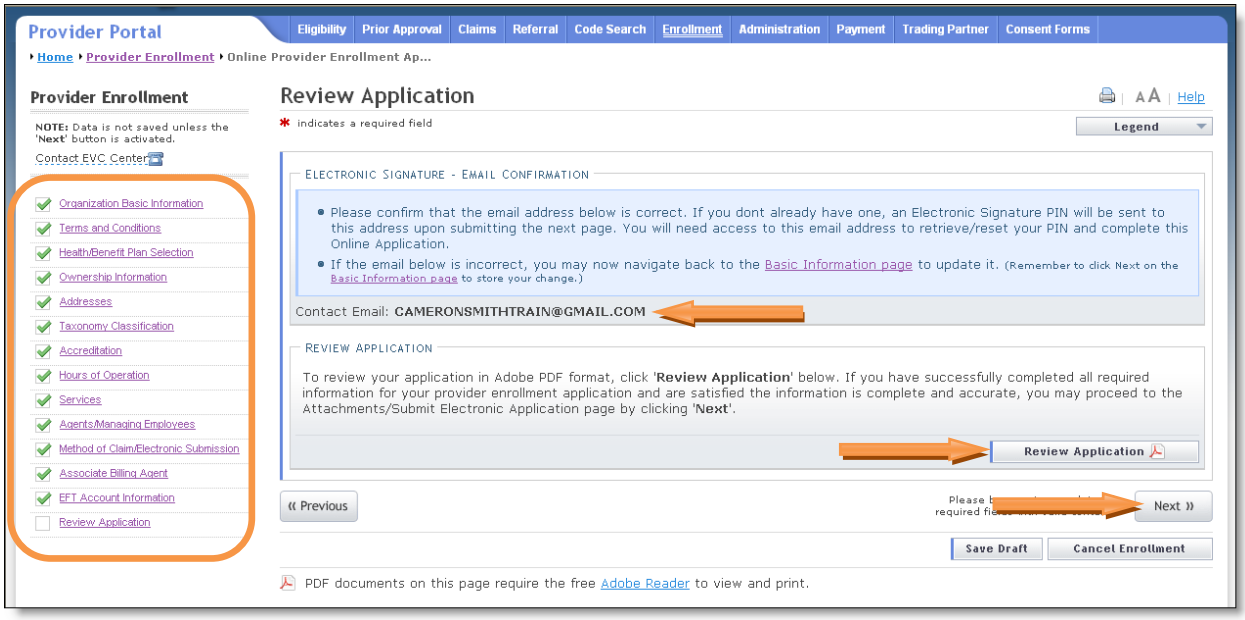

Figure 23: EFT Review Application

13. The **Sign and Submit Electronic Application** page will display. Enter the NCID and password, as well as the **PIN** number and click the **Submit Now** button.

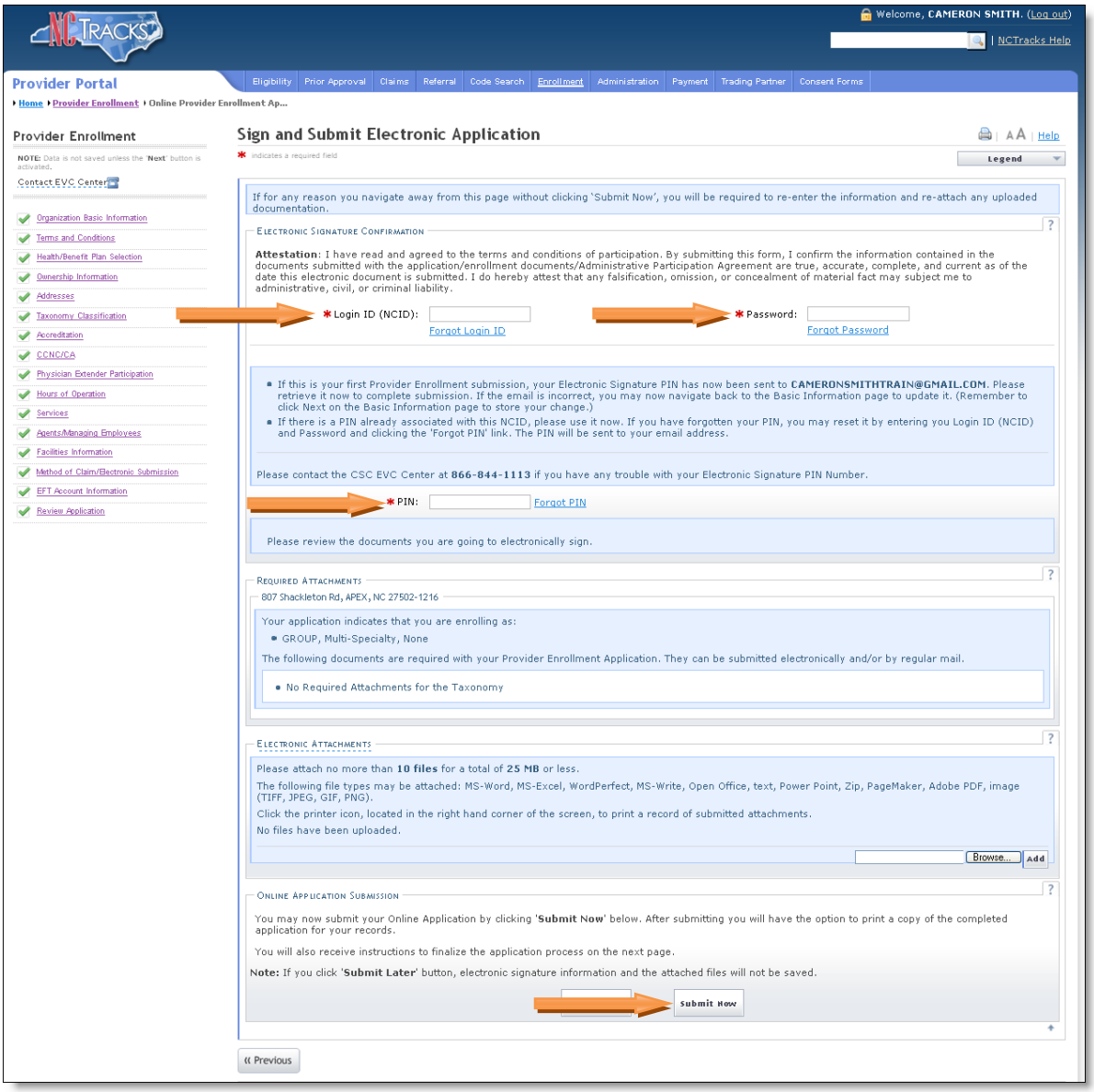

Figure 24: Sign and Submit

Steps for Sending/Receiving Batch Claims and Other Electronic Transactions

The NCTracks Trading Partner Connectivity Guide provides screen shots and steps for submitting batch claims. Reference the following link to view this guide.

https://www.nctracks.nc.gov/content/public/dms/public/pdf/companion-guides/NCTracks_Trading_Partner_Connectivity_Guide_V3.pdf

Removing a Billing Agent

To remove a billing agent, click the X icon next to the billing agent.

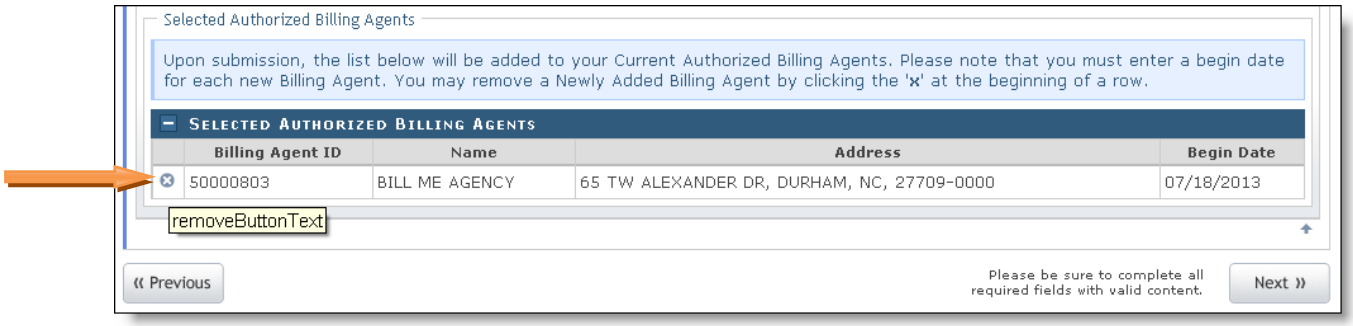

Figure 25: Remove Billing Agent

Tips for Navigating the Mange Change Request Application

All pages must be reviewed prior to continuing. If you receive the following error, click on the pages that do not have check marks next to the section and click Next through those sections.

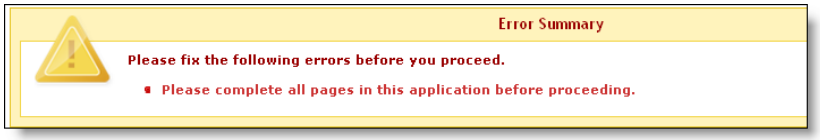

Figure 265 Error - Complete all Pages in the Application

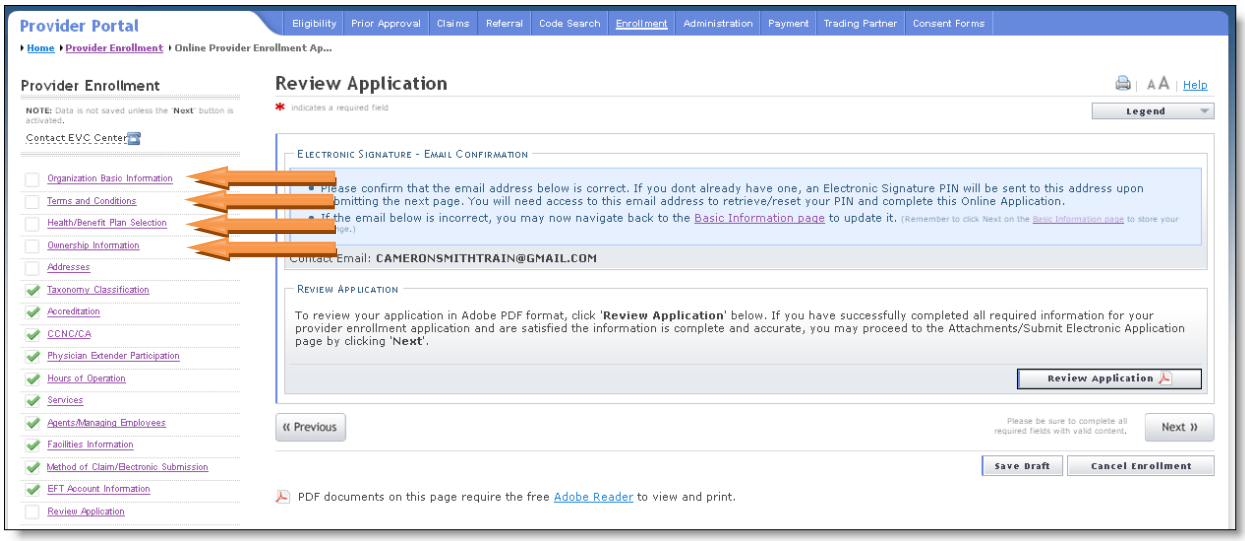

Figure 27: Review Application - Incomplete Pages