Xerox EDI Direct
Electronic Claims Acquisition Services
WINASAP5010 Quick Reference Guide
BrickStreet Mutual Insurance

This document was developed for the BrickStreet Mutual Insurance provider community. It is intended to provide download and setup instructions for WINASAP5010, a claim creation and submission software program.

Updated 06.07.2012

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WINASAP5010 Minimum Requirements

To use WINASAP5010, your personal computer must meet the following minimum requirements:

- Windows 98 Second Edition, Windows, NT, Windows 2000 (Service pack 3 or higher) and Windows XP Professional Operating Systems. (Window XP Home may cause some issues with installing.)
- Pentium Processor
- CD-ROM Drive
- 25 megabytes of free disk space
- 128 megabytes of RAM
- Monitor resolutions of 800 x 600 pixels
- Hayes compatible 9600 baud asynchronous modem
- Telephone connectivity

Converting WINASAP2003 Database to WINASAP5010 Database

Please be advised, it is not recommended that WINASAP trading partners perform the standard database conversion from WINASAP2003 to WINASAP5010. The database structures are different between the two software applications and may cause patient, provider or claim data to be converted improperly.

If you choose to perform the database conversion, refer to section *"12.7 Converting WINASAP2003 db to WINASAP5010 db"* AND *SECTION "12.7.1 Notes in Using Converted WINASAP2003 db on WINASAP5010".*

After downloading the WINASAP5010 software please follow the below steps to perform the conversion correctly.

Note**: Don't use the "Restore Database" of WINASAP5010 when converting the database from WINASAP2003. WINASAP5010 is unable to read the restored database.**

Converting WINASAP2003 db to WINASAP5010 database

WINASAP5010 allows users from WINASAP2003 to convert all the reference table information, such as claim, patient and provider. After the conversion it will still be necessary to open each claim, patient and provider record in WINASAP5010 to enter any additional information now required by HIPAA since this information either did not exist or was not required in WINASAP2003. The information that will have to be added is listed below:

- Additional Claim Information that will need to be added to each record converted from WINASAP5010
- Additional Patient Information that will need to be added to each record converted from WINASAP5010
- Additional Provider Information that will need to be added to each record converted from WINASAP5010

Steps to perform the correct database conversion

1. Click on the Windows Start button.

2. Select Programs. Highlight WINASAP5010, then select, Convert WINASAP2003 files to WINASAP5010.

3. Click the convert button. This will now copy the database of WINASAP2003 and then convert it to a format which is usable in WINASAP5010. Note: **WINASAP2003 should also be installed in the same machine since the converter would copy its database then convert it to WINASAP5010 format.**

4. Once the conversion is complete, open WINASAP5010 and verify that your data is there. Then you will need to go into each patient and provider record and add any additional required information as explained above.

Required Review by WINASAP5010 Users
WINASAP users will be required to review the following WINASAP5010 sections due to the updated database structure from WINASAP2003 to WINASAP5010. Some changes in the database are new columns, increased length, and deleted values of the fields' qualifiers. This will assist the WINASAP5010 user to submit their 5010 files successfully. The sections to review are listed below.

Trading Partner Information – the information from WINASAP2003 in this Section was designed not to be copied to WINASAP5010 to ensure that the users would not accidentally transmit WINASAP2003 files to WINASAP5010 system and vice versa. Fill the necessary fields and then click the Save button to ensure that the values entered are compliant. Please refer to page 11 of this guide for further information on setting up your Trading Partner Information.

Provider Data – there are several changes and corrections in this section. The biggest change, which is essential, is the change in the Secondary Identification information. There is a new Identification Type (Provider Tax Identification Number) which is required and needs to be entered first. Some Identification Types were also deleted (which would show as blanks) in 5010. The resolution is to delete their respective Identification Number or update them with their corresponding new Identification Types from the drop down menu. Click the Save button to ensure that the values entered are 5010 compliant. Please refer to page 14 of this guide for further information on the Provider Data table.

Patient Data – new fields such as Property and Casualty Information can be seen in both the Patient Data and Insured's Data tabs, these fields are situational so leave them blank if no information is available or if your claim is not a Property and Casualty Claim. In addition, there is a new button named Payer Secondary ID in the Insured's Data tab on the bottom right. The Payer Secondary ID fields are classified situational (not required) fields. Click the Save button to ensure that the values entered are 5010 compliant. Please refer to page 16 of this guide for further information on the Patient Data and Insured Data tabs.

Claims Data (Dental Claim, Institutional Claim, Nursing Facility Claim, Nursing Facility Template, and Professional Claim) – several fields and dropdown items were removed in WINASAP5010. There are some new fields which are required and should be entered first prior to sending the claim. **Note:** Do not copy any claims that were used in the WINASAP2003 software. The WINASAP user is required to key any new claims in the WINASAP5010 to ensure that the entered values are 5010 compliant. Click the Save button to ensure the values and fields are 5010 compliant. Please refer to the Specific Claim Information starting on page 18 of this guide for further information on Claim Data.

Downloading WINASAP5010

- Go to http://www.acs-inc.com/edidirect/
- From the menu bar, Claims Gateway > WINASAP > Software and Manuals
- On the WINASAP5010 Software and Manuals page, click WINASAP5010 Version 1.01.
- A new window will open with a direct link to download the software. Please proceed to download.
- When the screen appears prompting you to 'Open this file from its current location' or 'Save this file to disk', choose 'Save this file to disk'. Then click 'OK'.
- A box will appear asking where you would like to save the file. In the 'Save In' box select Desktop from the drop down menu, click 'Save'.
- After the file has completed downloading, you may close your Internet connection.
- Double-click the file named Winasap5010_v101P.exe', located on your Windows Desktop, and follow the on-screen installation instructions.

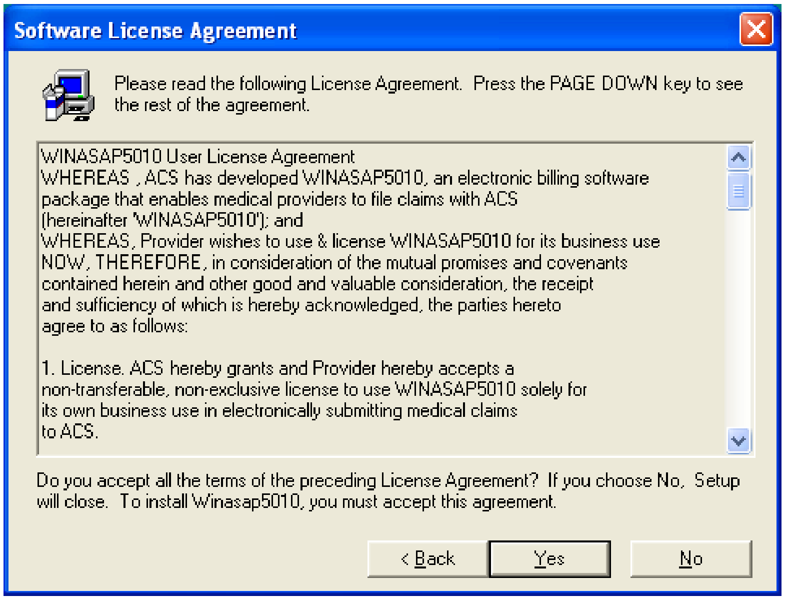
Installing WINASAP5010

The installation and setup of WINASAP5010 is an easy, two-step process:

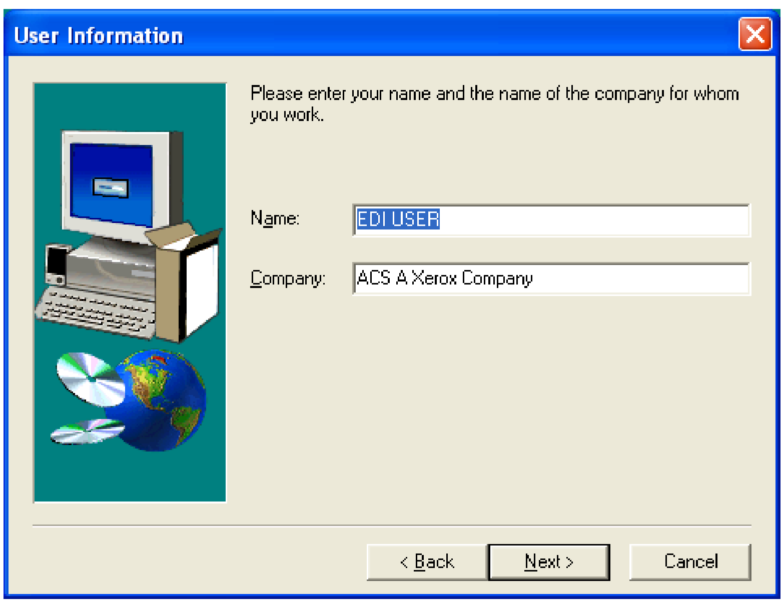
1. **Install** the WINASAP5010 software on your PC.
2. **Start** WINASAP5010 and set up your **Trading Partner** and **Reference** tables.
3. When the first Welcome Window displays, click the **Continue** button.

4. When the second Welcome Window displays, click the **Next** button.

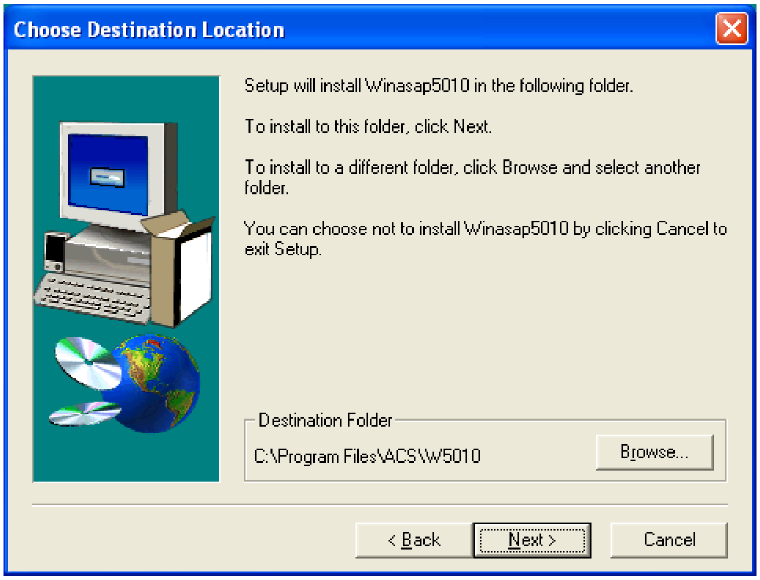
5. The Software License Agreement window displays next. Read through the agreement and click "yes" to accept the terms of the agreement and continue installing WINASAP5010. If "no" is clicked, the install program will terminate.



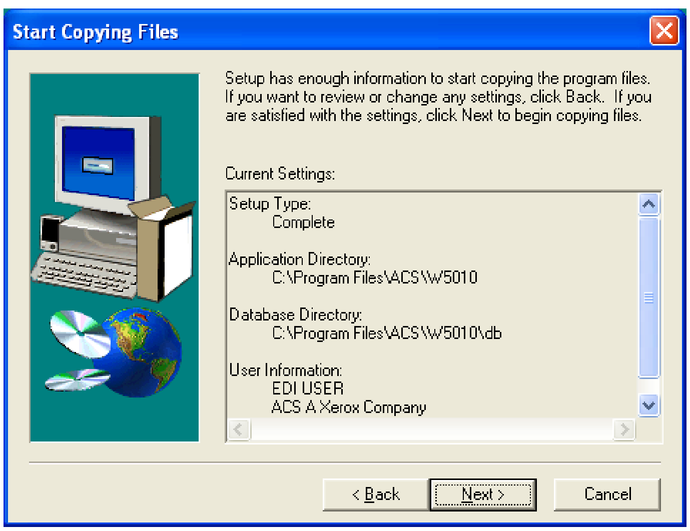
6. The User Information window will display next. Enter your name and the name of your company. Once this information is entered, click **Next**.



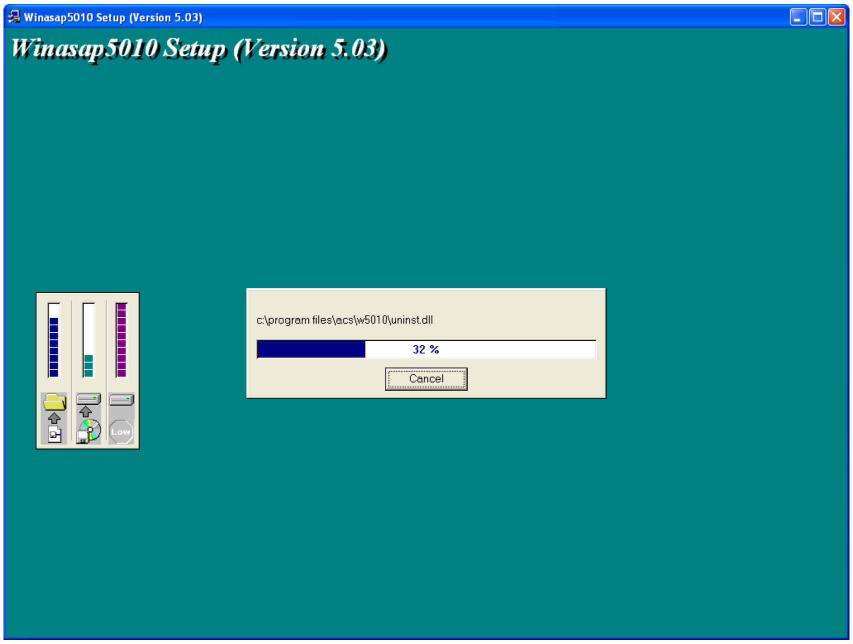
7. The “Choose Destination Location” window will display. WINASAP5010 indicates where its program files will be installed. Click the **Next** button.



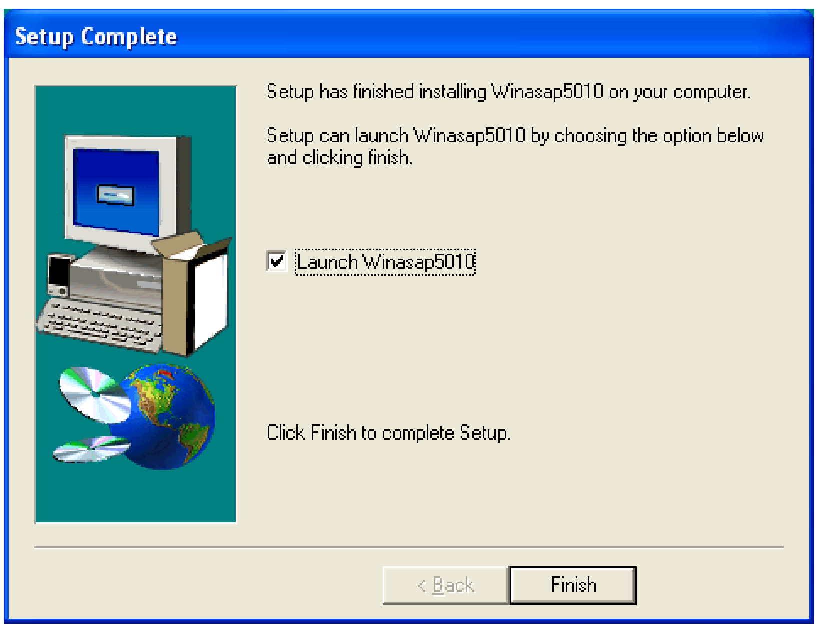
8. The “Start Copying Files” window follows, indicating the current settings you have chosen so far during the installation. Click the **Next** button.



9. WINASAP5010 will begin copying its files to your hard drive.



10. If you chose to restart your computer or you did not get the restart window, you will now see the option to **Launch** the program. If you place a checkmark in this box and click Finish, it will start WINASAP5010. If you chose to launch the program after you clicked Finish, go to Step 17, otherwise go to Step 13.



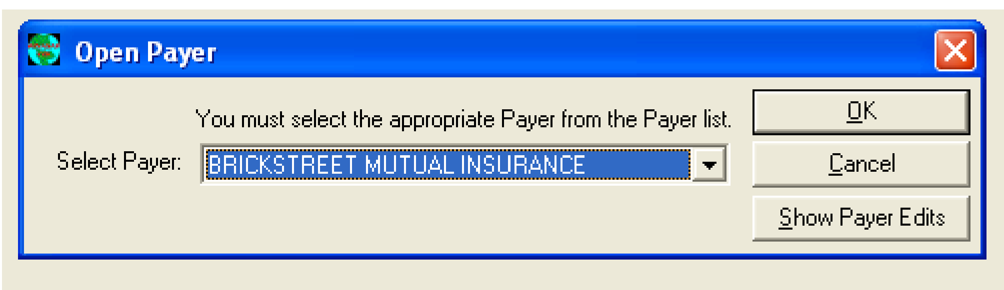
11. Click the **Finish** button.

12. When WINASAP5010 opens, enter “asap” as the password for the ADMIN user ID, click OK and then select the payer you will be submitting claims to. This will become the default payer.

Note: If you did not select “Yes, Launch the program file," then follow these steps to open WINASAP5010.

13. Click on the Windows Start button and select Programs.
14. In the User ID field, select the user name from the drop-down list box. (“ADMIN” is the initial default.)

15. In the Password field, enter your password. (“asap” is the initial default for the “ADMIN” **USER ID**.
16. Click on the **OK** button.
17. The **Select Payer** drop-down box will appear. Select the payer you will be submitting claims to. Once you make this selection, it will become your default payer. You will not need to choose it each time. Click on the **OK** button.



18. The WINASAP5010 Desktop with the Main Menu Bar will display.

You are now ready to begin updating reference tables or entering claims.

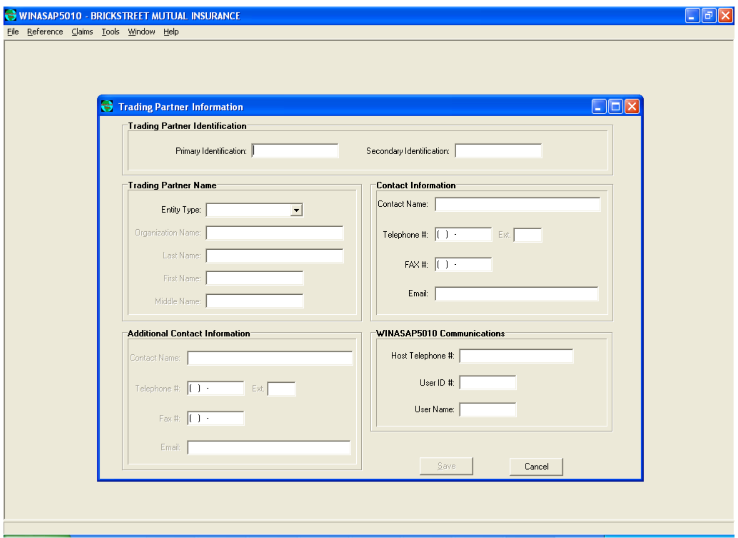
Note: WINASAP5010 has a default user ID of “ADMIN” and password of “asap”. If you want to use the default user ID, you may. However, if you want to establish different security levels for different users you may do so by following the procedures in the user manual.

Setting Up Trading Partner Information

WINASAP5010 uses the information you enter in the Trading Partner Information window to uniquely identify your claim data and to provide Xerox EDI Direct with the information necessary to authorize and accept your claim transmissions.

Note: The Trading Partner Information screen must be completed **before** you can successfully submit claims – **This is a required step**! In the event that your name, address, telephone numbers, or identification numbers change, you can perform these procedures again to update your Trading Partner data.

1. From the WINASAP5010 Main Menu bar, select the File option.
2. Select the Trading Partner option. (This will open the Trading Partner window.)



3. In the **Trading Partner Identification** section, complete the following field:
    - **Primary Identification** field, enter your 5- or 6-digit Trading Partner ID number assigned to you by Xerox EDI Direct and press <TAB>. (This is a required field.)
    - **Secondary Identification** field, enter your 5- or 6-digit Trading Partner ID number assigned to you by Xerox EDI Direct and press <TAB>. (This is a required field.
4. In the **Trading Partner Name** section, complete the following fields:
    - Entity Type. Select the appropriate choice from the drop-down list box. (This is a required field)
    - Organization Name (if non-person entity selected) or Last Name/First Name (if person selected). (This is a required field.)
5. In the **Contact Information** section, complete the following fields:
    - Contact Name
    - Telephone #
    - Fax #
    - Email
6. In the **Additional Contact Information** section complete the following fields if different from the above contact information:
    - Contact Name
    - Telephone #
    - Fax #
    - Email

7. In the **WINASAP5010 Communications** section complete the following fields:
    - In the **Host Telephone #.** field, enter Xerox EDI Direct data telephone number as follows: 18503857455. If you must dial 9 to access an outside line, enter the telephone number as: 9,18503857455. (The comma causes a one-second pause.) You MUST enter the comma between the 9 and the first digit of the telephone number. If your phone line has the call-waiting feature, disable it. (Refer to your local telephone book for instructions.) The following is an example of a number with call-waiting disabled: *70,9,18503857455

NOTE*:* Please refer to your logon sheet for your specific submission phone number.

If your office has a long-distance access code and you are unsure where to enter that number in this field, please call the Xerox EDI Support Unit.

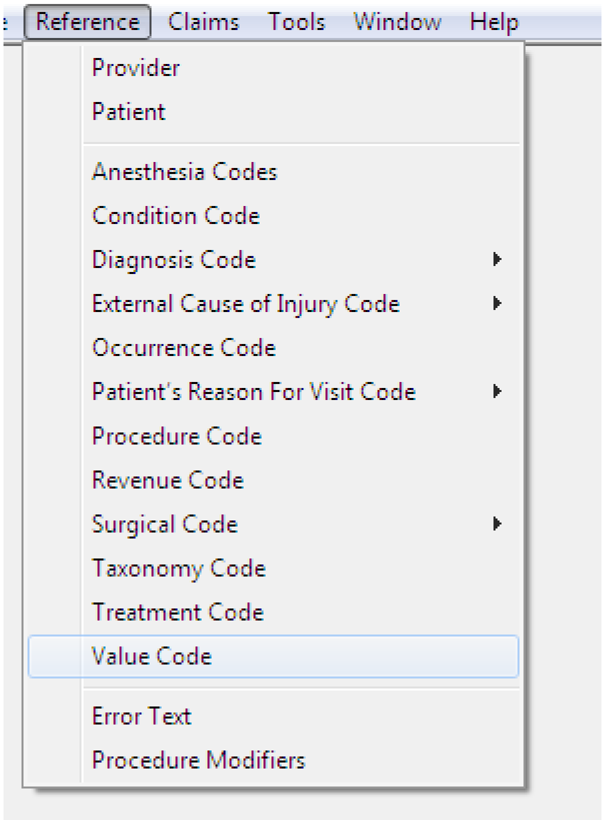
- In the **User ID#** field, enter your 9-digit user ID and press <TAB>.
- In the **User Name** field, enter your User Name exactly as it appears on your logon form.

8. Click on the **Save** button to record / update your Trading Partner data.

Setting up Reference Tables

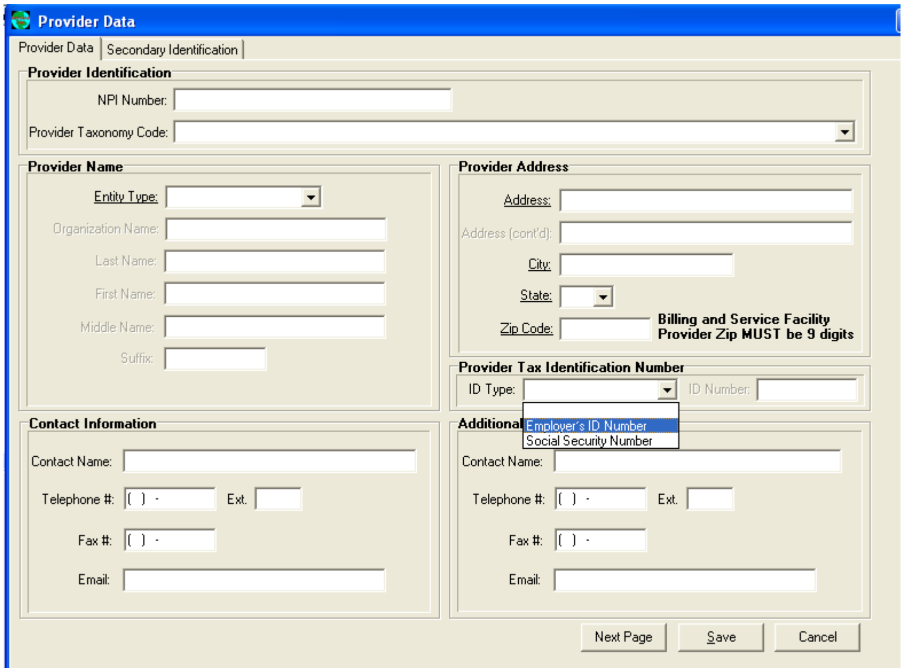
Although some reference tables are optional, they allow you to key claims faster. Information from the reference tables is used by the system to automatically fill claim fields or to create drop-down list boxes to help you select data field values.

In the following section, you will find an example of setting up a reference table for **Provider Data and Patient Data, both of which are required**.



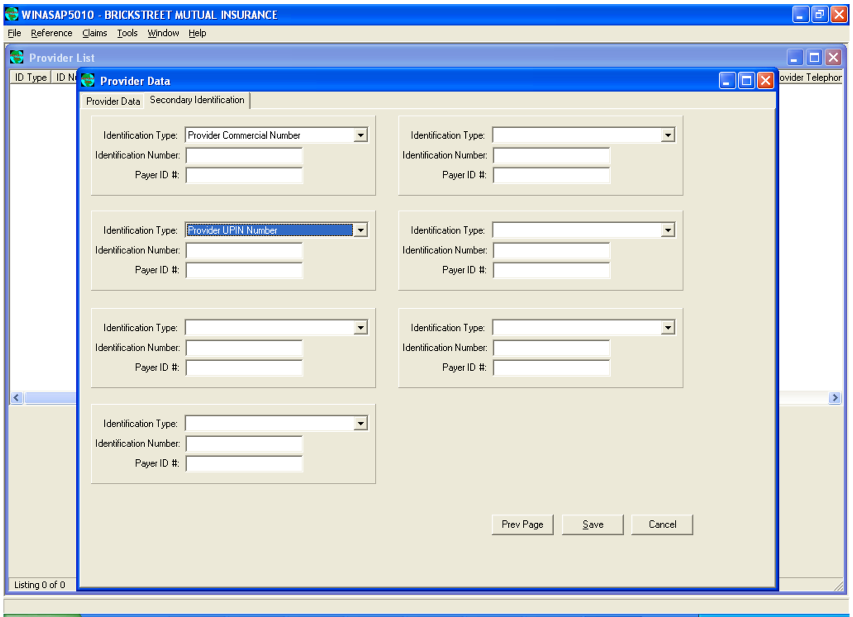
Setting up Provider Data

1. From the WINASAP5010 Main Menu bar, select the **Reference** option.
2. Select the Provider option. (This will open the Provider List window.)
3. Click on the **Add** button. (This will open the Provider Data window.) You must select the HCFA National Provider ID. **Note**: You will now enter your EIN or SSN on this tab and not on the Secondary Identification tab.



4. In the **Provider Address** section complete the following fields:
   - Address. Enter the provider's physical address and press <TAB>
   - Address con't
   - City. Enter the name of the city in which the provider's practice is located and press <TAB>
   - State. Use the drop-down list box to select the state in which the provider is located and press <TAB
   - Zip Code. Enter the postal zip code for the provider's office address and press <TAB>
5. In the **Contact Information**, section complete the following fields:
   - Contact Name
   - Telephone #
   - Fax #
   - Email
6. In the **Additional Contact Information**, section complete the following fields only if different than the above contact information:
   - Contact Name
   - Telephone #
   - Fax #
   - Email

7. Click the Next Page button to enter Secondary Information. You must enter your 11 digit BrickStreet Commercial ID and select Provider Commercial Number. **Dental providers only**- when entering your UPIN please select Dentist License Number and then put in your UPIN.

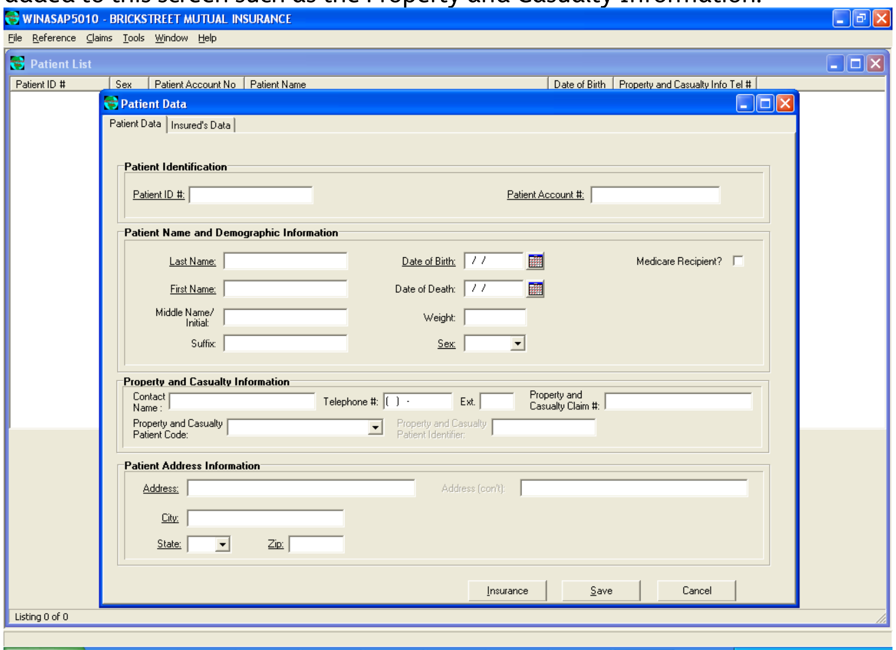


8. Click on the Save button.

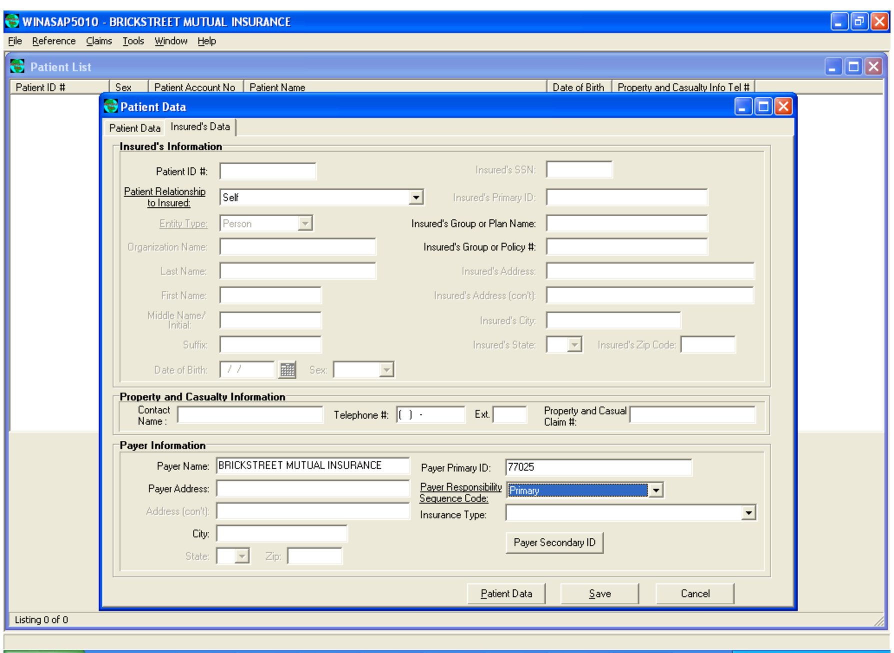
Setting up Patient Data

1. From the WINASAP5010 Main Menu bar, select the **Reference** option.
2. Select the Patient option. (This will open the Patient List window.)

   Click on the **Add** button. (This will open the Patient Data window.) New information has been added to this screen such as the Property and Casualty Information.



3. Click the **Next Page** button to enter Insurance Information. Choose Self under the Insured Information. Choose Primary under the Payer Responsibility Sequence Code. Additionally, there is a new button named Payer Secondary ID under this tab.



4. Click on the Save button.

Quick Tips for Using WINASAP5010

- Make sure you enter all providers and patients that you are submitting claims for in the Reference Section of the software first, completing all the information (including the address).
- Use the Tab key or the Enter key to advance to the next field when you are filling in any screen (Reference or Claims).
- Do not use decimals or add extra zeros to procedure or diagnosis codes.
- The F5 key is a "quick key" for adding the current date in all date fields.
- For faster data entry, go to the Reference Menu first (located in the upper left corner) and fill out your applicable codes commonly used in your claims submission. Example:

  If you use the same group of procedure codes repeatedly, enter the codes into the Procedure Code Reference Screen and use the drop-down menu on the claim form to select the code instead of data keying. You can also use this process for other reference information, such as patient data, diagnosis codes, etc.

- Dates earlier than 1960 (1959 and before) must be entered in MMDDCCYY format (e.g., November 18, 1945 = 11181945). If not, WINASAP5010 will interpret the two-digit date as being 2045, vs. 1945.
- To quickly select the appropriate date in a date field, click the calendar button then double-click the appropriate date. If you no longer want to select a date press the spacebar to exit the calendar window pop-up.

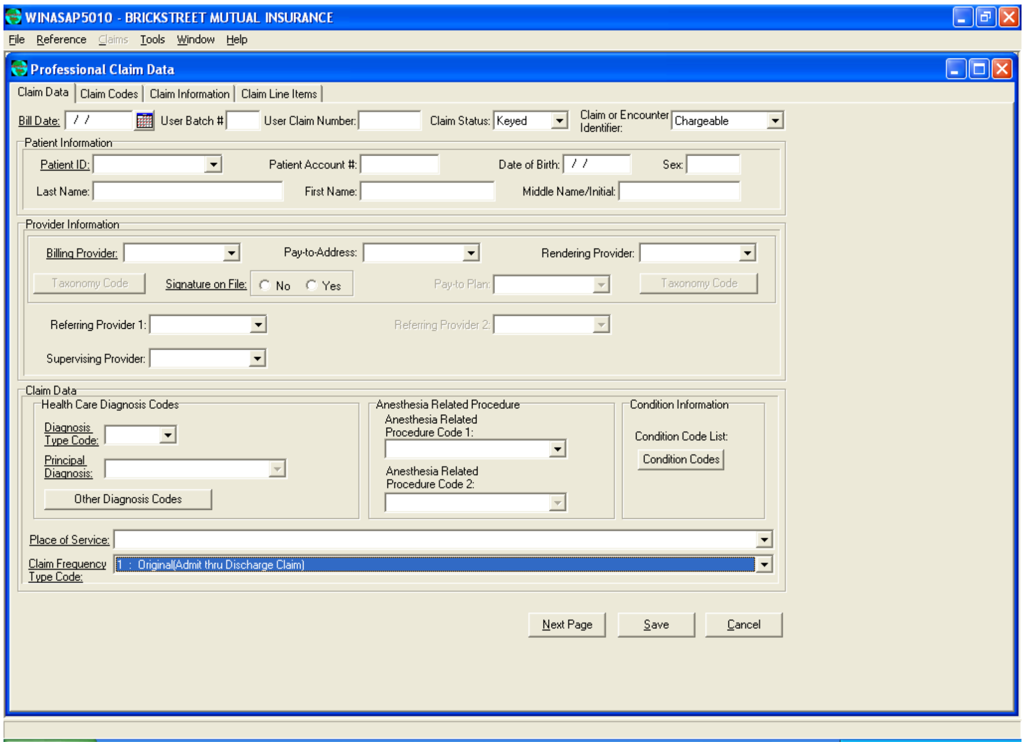
Free technical support is available from the Xerox EDI Support Unit.

Specific Claim Information

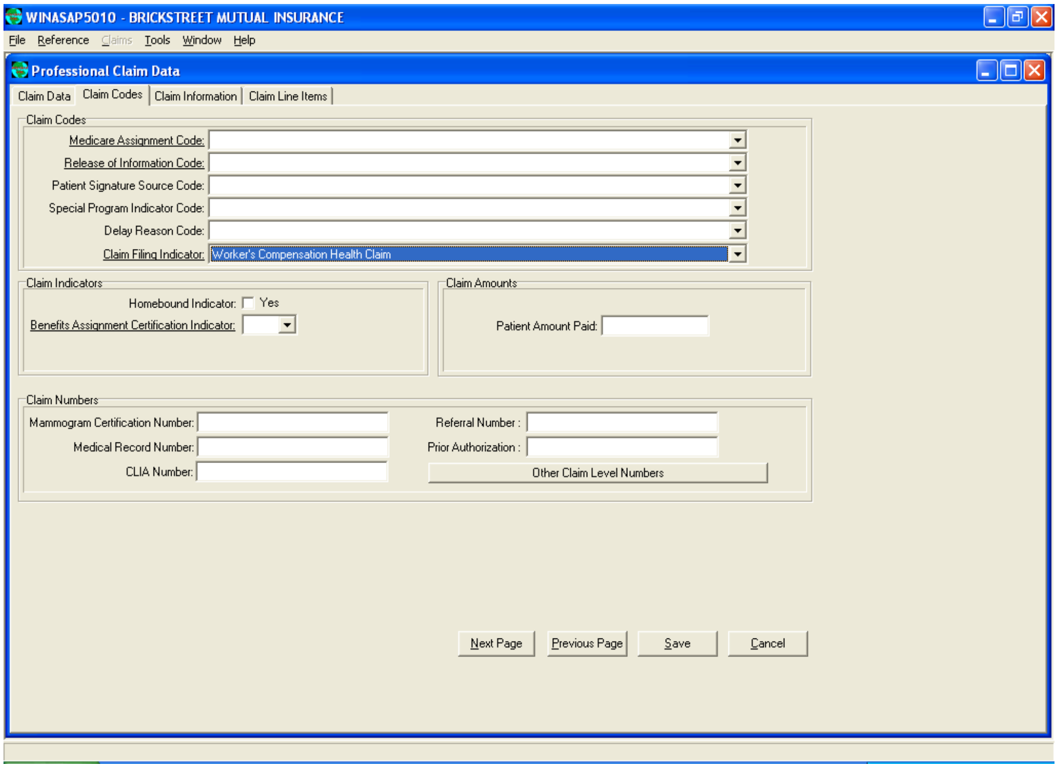
This section will identify specific fields used by BrickStreet Insurance, by claim type, which need additional explanation.

Professional Claim (HCFA1500)

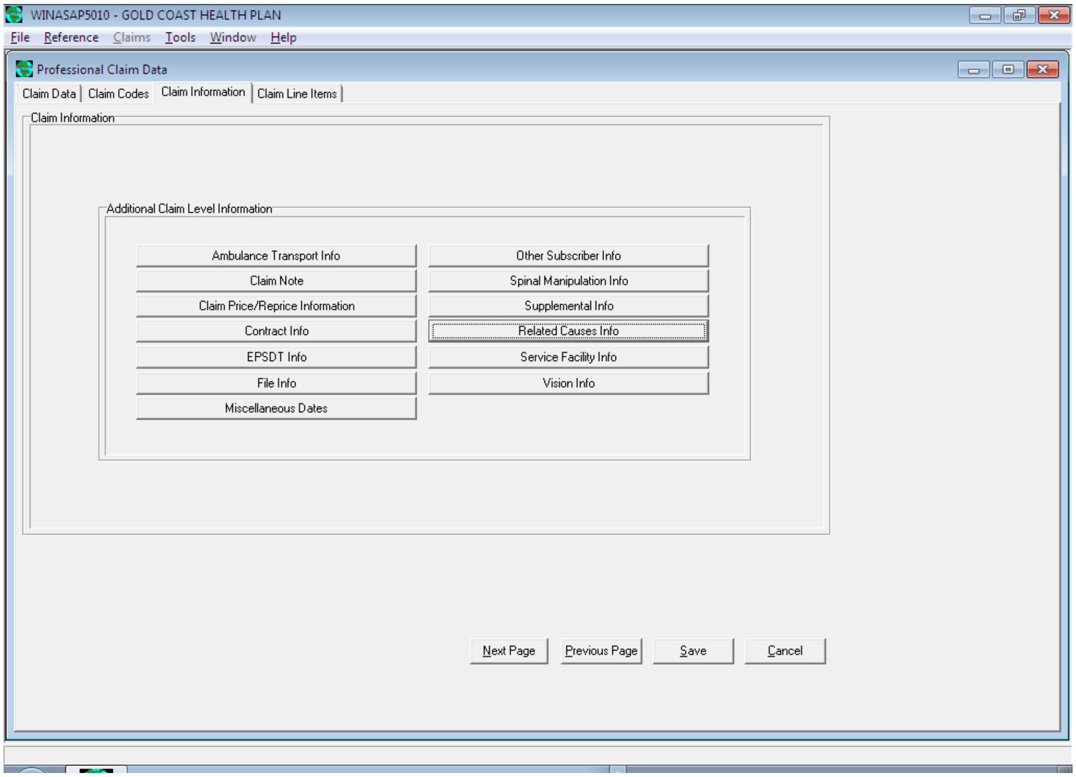
Choose 1:Original.Admit through Discharge for Claim Frequency Code.

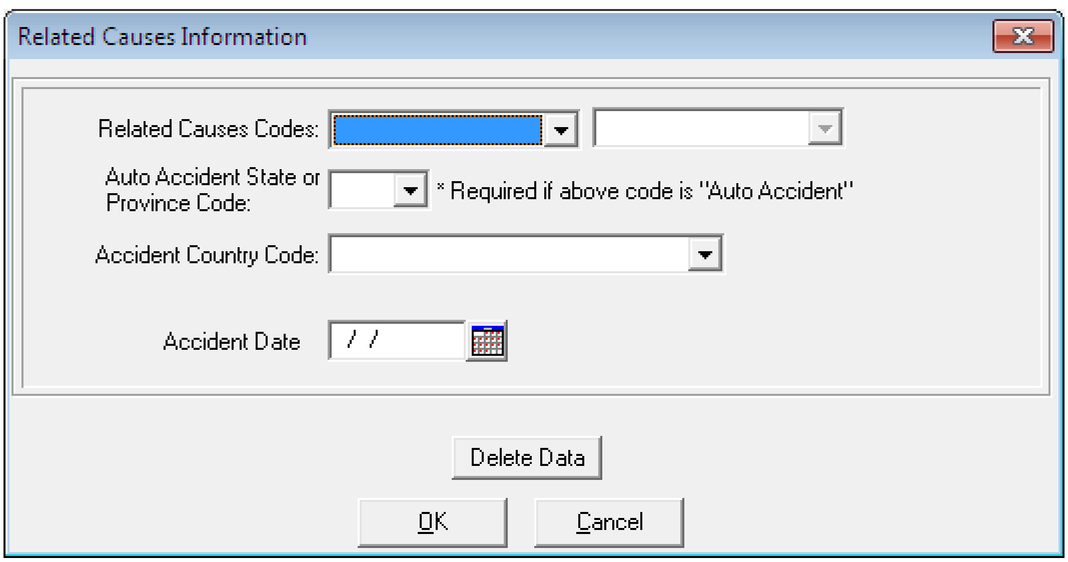


Under Claim Codes, choose Workers Compensation Health for the Claim Filing Indicator.



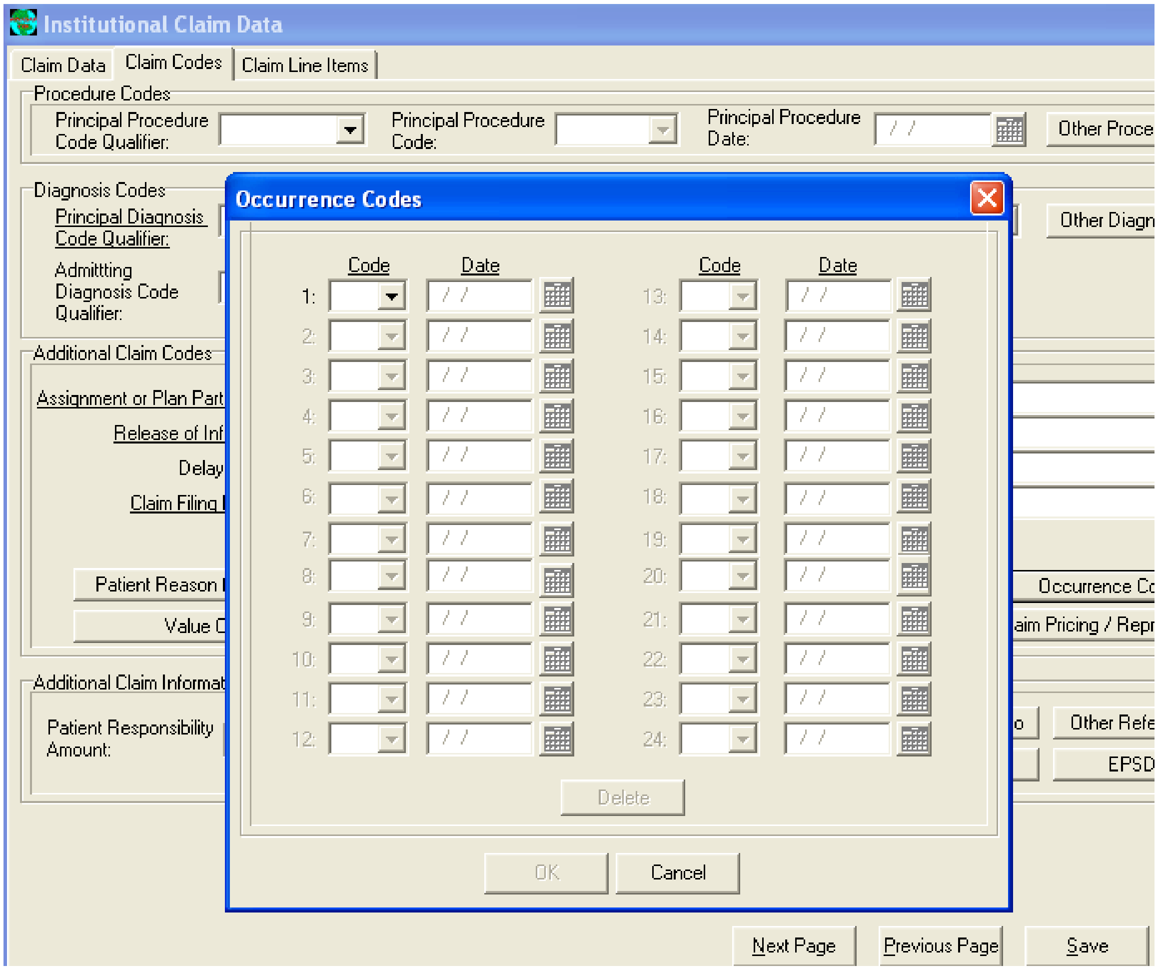
Under Claim Information, click Related Causes Info to enter the Accident Date for the Date of Injury.





Institutional Claim (UB92)

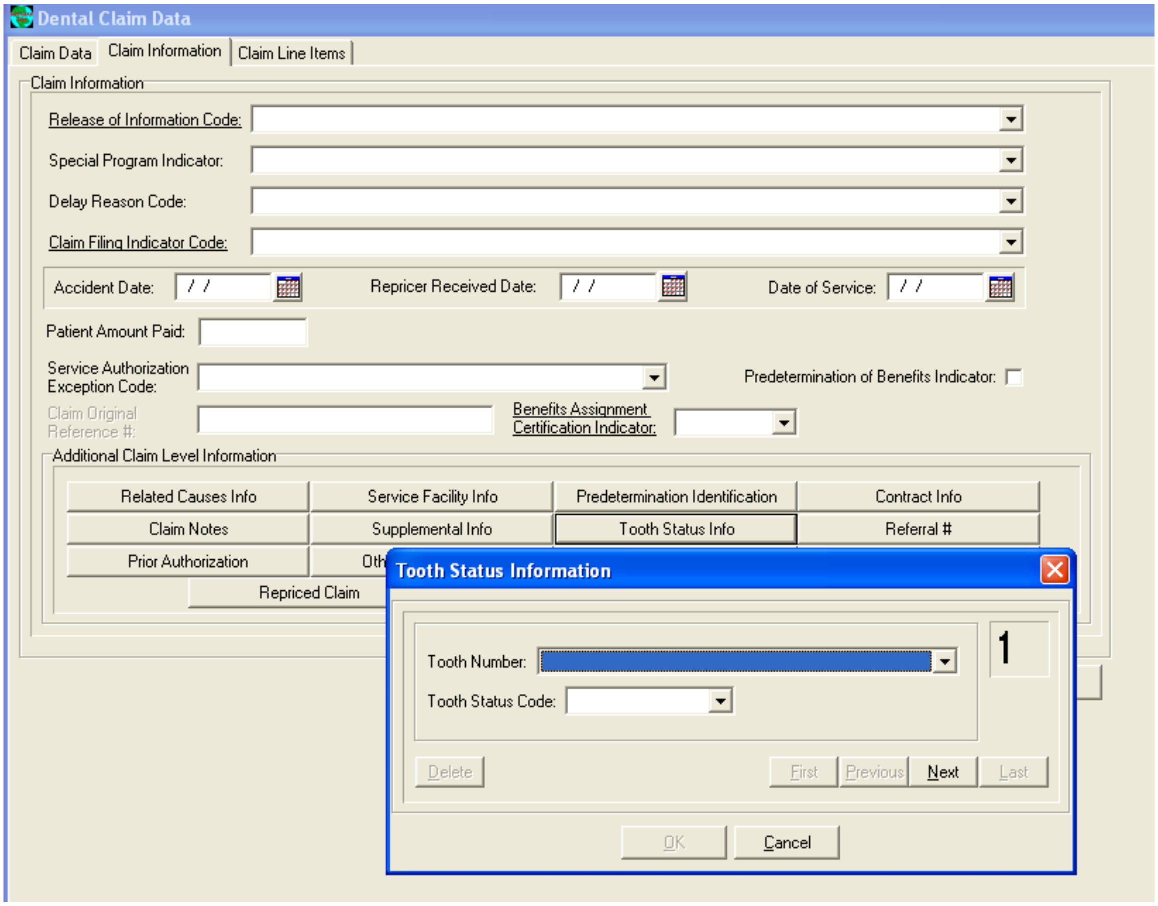
Enter Date of Injury under Occurrence Codes.



Dental Claim

Enter the Date of Injury under the Accident Date. You will also be prompted to fill in the related causes info, choose other accident and click ok.

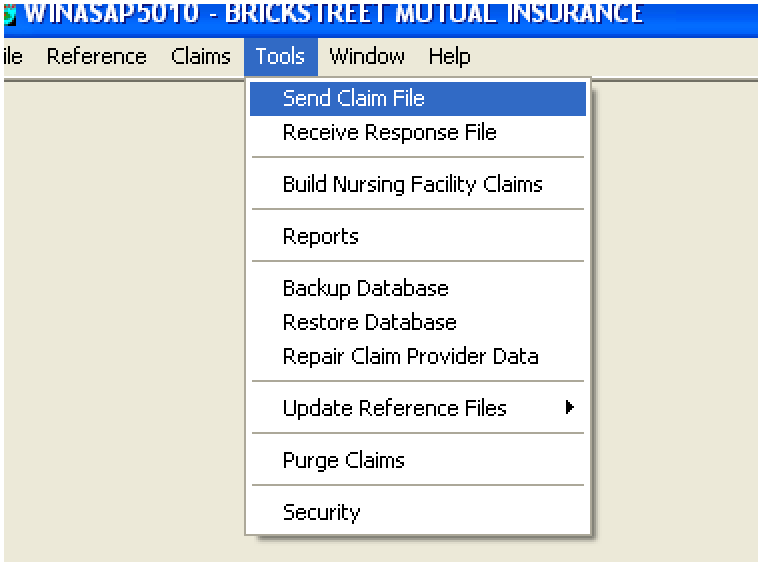
Enter the tooth number under Tooth Status Information.



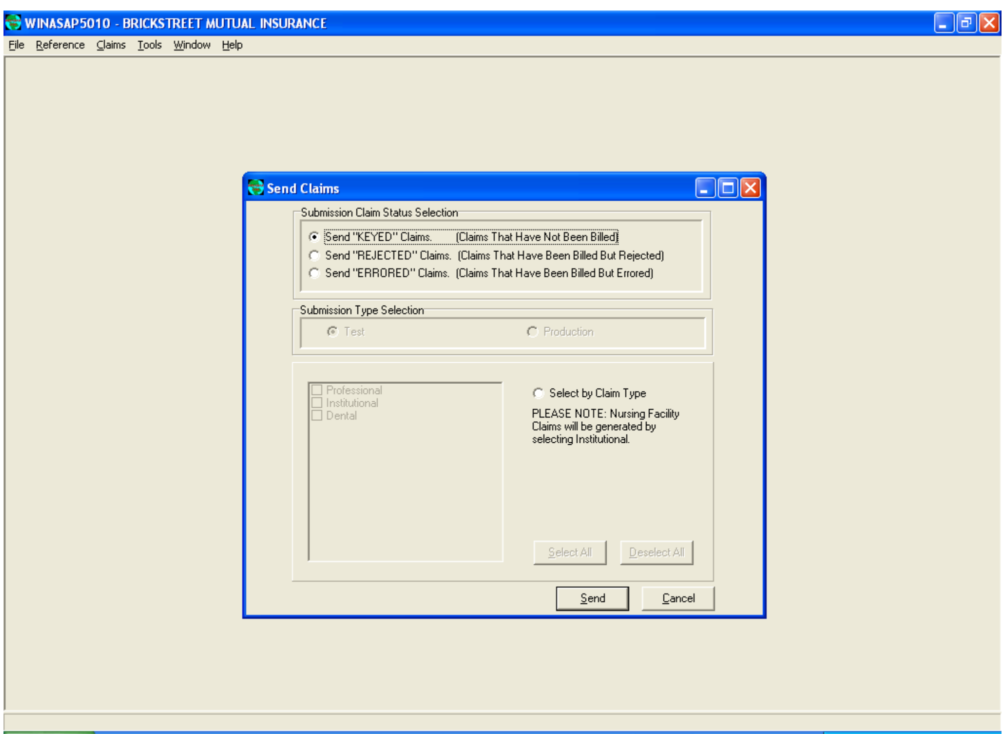
Transmitting Claims/Receiving Responses

This section will explain how to send claims electronically once they have been keyed.

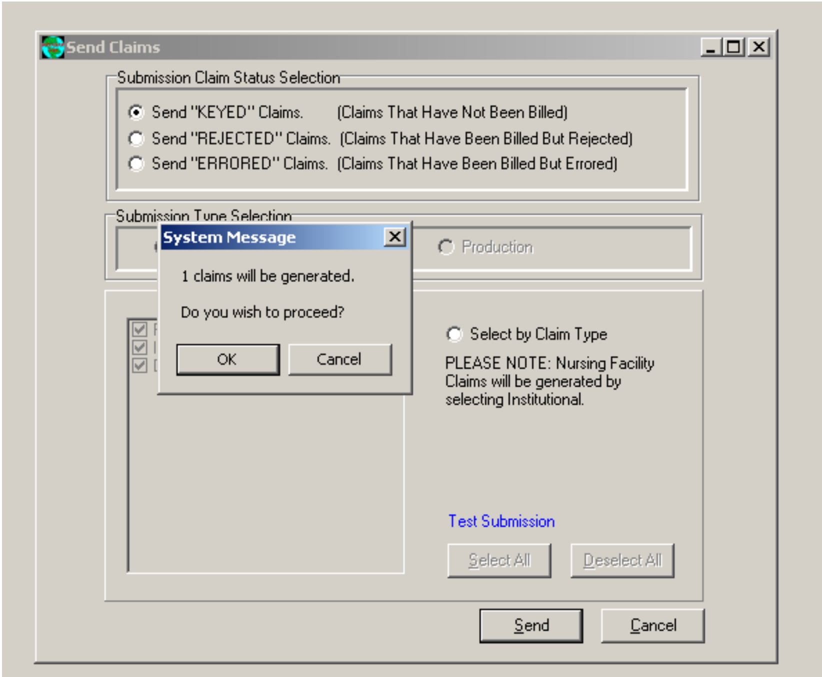
1. Select Tools/Send Claim File



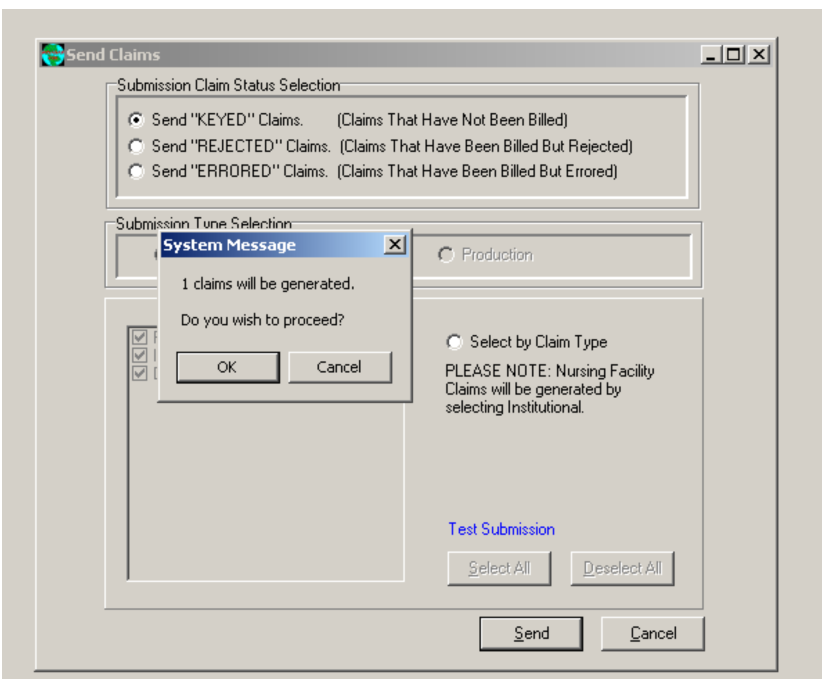
2. Then select Send Keyed Claims, choose production and click Send.



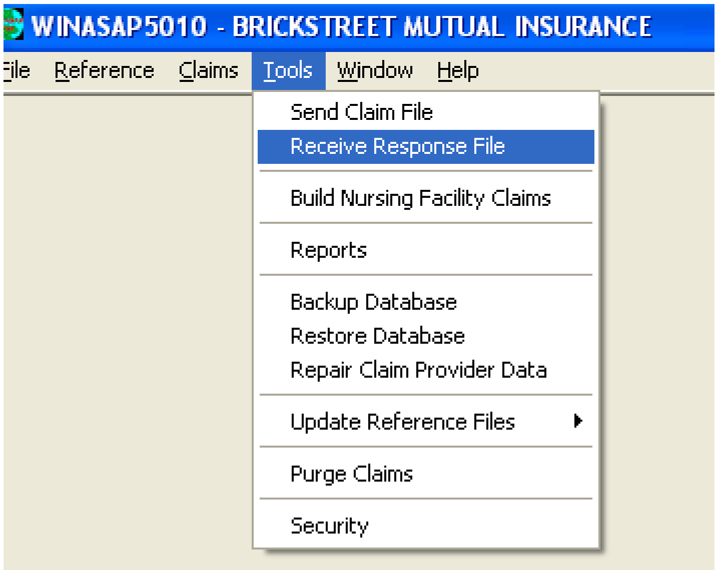
3. The following screen will appear, click Ok, if the number of claims to be sent is correct.



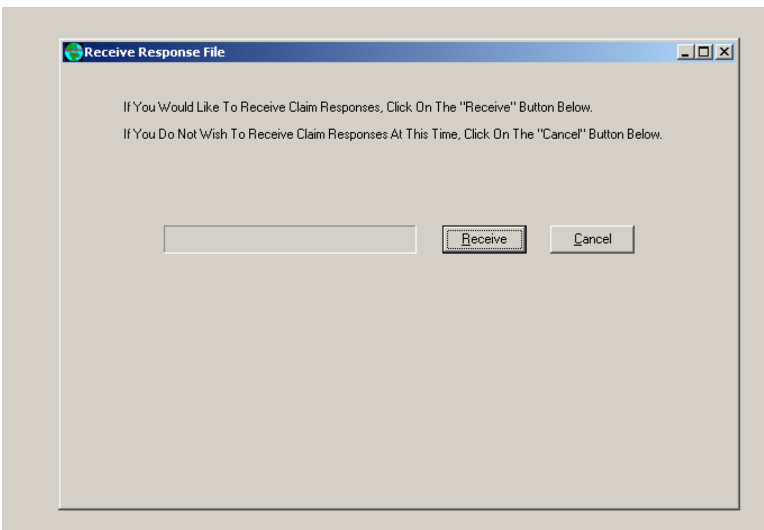
4. WINASAP5010 will generate the claims and then dial the modem to send them. You will see a confirmation report appear just as it did after WINASAP2003 sent claims. WINASAP5010 stores the last 50 confirmation reports in the reports section.



5. After at least 2 hours go back into WINASAP5010 and receive your response file. This will let you know if the file was accepted or rejected.
6. Select Tools/Receive Response File



7. Click Receive



8. You will not actually see the file, but it will change the status of your claims to either accepted or rejected. If they are rejected, contact the Xerox EDI Support Unit for assistance.