

# Installing and setting up the ExpressBill EDI 9.x plug-in

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The ExpressBill EDI 9.x plug-in is an auxiliary program that works with Centricity® Practice Solution 9.x or later versions, to enable the electronic creation and transmission of statement files.

This document describes how to install and set up the ExpressBill EDI 9.x plug-in and modify your existing Centricity Practice Solution database for electronic data interchange (EDI) transaction processing.

The procedures you need to perform depend on your reason for installing the plug-in, for example first-time implementation of EDI claim processing versus a simple plug-in upgrade. Refer to the appropriate checklist to determine the required procedures.

## Using the documentation

Adobe® Portable Document Format (PDF) is a universal file format and standard for electronic distribution of documents. Using Adobe's Acrobat® Reader®, you can view and navigate PDF files online or print them. However, because much of this content is step-by-step instruction you may want to print relative information. See the Acrobat Reader help for more information.

To make the best use of this document, you should be aware of the conventions used, which are intended to facilitate finding, reading, understanding, and using the available information.

### Text conventions

### Used to indicate...

Menu > Menu Command	What you select from the menu bar; for example, "Select <b>Edit &gt; Companies</b> ."
Note	A statement of general interest.
Prerequisite	A condition that must exist before you can perform a procedure.

### Formatting conventions

### Used to indicate...

Bold text	Software interface elements (such as tab, button, field, and checkbox) that you interact with by selecting, choosing, or clicking. Screen elements that are only referenced are in plain text.
Fixed-width fonts	Text you enter by typing, for example: 1 972 889 5465

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## Checklist for first time installations

If your practice is new to EDI transaction processing or if this is a first time installation of the ExpressBill plug-in, you need to perform the following tasks to install the plug-in and set up Centricity Practice Solution for transaction processing.

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 Some tasks have more than one procedure.

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- [“Enroll for EDI statement processing” on page 4](#)
- [“Order ExpressBill license” on page 5](#)
- [“Collect required information” on page 6](#)
- [“Install the ExpressBill EDI 9.x plug-in” on page 7](#)
- [“Verify plug-in installation” on page 8](#)
- [“Set up the clearinghouse” on page 10](#)
- [“Modify statement setup” on page 15](#)

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## Checklist for upgrading only

If you want to upgrade the currently installed plug-in, you need to perform only the following procedures.

If you are changing clearinghouses, you should treat this as a new installation. See the [“Checklist for first time installations” on page 2](#).

- [“Install the ExpressBill EDI 9.x plug-in” on page 7](#)
- [“Verify plug-in installation” on page 8](#)

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## Enroll for EDI statement processing

Before you can electronically process statements through the ExpressBill clearinghouse, you must enroll through GE Healthcare EDI.

Enrollment normally takes three days to complete. When you receive your account information (login name and password), you must contact Centricity Practice Solution Services Specialist, EDI Implementation Specialist, or VAR to help set up your database and send a test transaction. After you receive a sample statement from ExpressBill, and your practice approves the statement, you can send production statements.

Refer to your Centricity Practice Solution Welcome Kit and contact GE Healthcare EDI by phone or e-mail:

- 888-436-8491
- CentricityEDIServices@ge.com

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## Order ExpressBill license

Before you can submit statements to ExpressBill, you must have an ExpressBill statements license.

If you are a new customer, your ExpressBill license is ordered by your VAR or GE Healthcare sales representative when you purchase Centricity Practice Solution. License numbers are added to your database when the VAR or sales representative installs Centricity Practice Solution at your site.

If you are adding this plug-in to your current Centricity Practice Solution system, contact your VAR or GE sales representative, and they will contact GE to add ExpressBill to your license. Then, GE Healthcare Technical Support will contact you to help you add the license information to your database.

The ExpressBill license is:

License	ID	Part number
Statements	109	MPEXPRESSBILL

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## Collect required information

Use the following checklist to ensure you have the information required to set up the Centricity Practice Solution database for EDI transaction processing.

### Site information

- Server name – name of your SQL server \_\_\_\_\_
- User name – SA (system administrator) \_\_\_\_\_
- Password – system administrator password \_\_\_\_\_
- Database name \_\_\_\_\_
- If transmitting files using the ExpressBill bulletin board service:
  - Name of connection device – type of modem \_\_\_\_\_
  - Dial location – location of the modem (workstation or server) \_\_\_\_\_

### ExpressBill information

- Account number – contact your ExpressBill representative \_\_\_\_\_
- FTP/BBS User Name – contact your ExpressBill representative  
\_\_\_\_\_
- Password – contact your ExpressBill representative \_\_\_\_\_

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## Install the ExpressBill EDI 9.x plug-in

Perform this procedure to install the ExpressBill EDI 9.x plug-in on a workstation (local computer) or a network server.

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 If you are installing the plug-in on a local computer and using the modem on the server to dial out, contact Centricity Practice Solution Services for assistance.

If you are installing the plug-in locally, you must install the plug-in on all workstations that are used to create and transmit electronic statements.

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### Prerequisites

- [“Enroll for EDI statement processing” on page 4.](#)
- Have administrative privileges to the computer or be logged on as the administrator.
- Know the server name, database name, and SA password. See [“Collect required information” on page 6.](#)
- Have Centricity Practice Solution security permissions.

To install the ExpressBill EDI 9.x plug-in

- 1 From the main menu, click the **Product Updates** button.  
The Centricity Practice Solution Product Installation page displays.
- 2 Click the link **Visit the GE Website for Product Updates** to download updates.  
The GE Product Updates page displays.
- 3 Under **Status**, select the **Download Update** or **New Download** link for the desired plug-in.  
The File Download page displays.
- 4 When the download is complete, select the **Back to Product Update page** link, then the **Back to Product Installer Page** link.
- 5 In the **Optional** section (for a new installation), select the **ExpressBill EDI 9.x** install link to install the plug-in for the first time.  
The InstallShield One-Step Install page displays.
- 6 Click **Install**.  
The InstallShield Wizard displays.
- 7 Follow the installation instructions to complete the installation.

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 You must configure the database the first time you install the plug-in and each time you install a new build of the plug-in. On the Setup Type window, select the **Yes, configure a new database** option. If you subsequently install the plug-in on other computers, select the **No, just install the plug-in on this workstation** option.  
The installation is complete when the status bar indicates **Done**.

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## Verify plug-in installation

Perform this procedure to ensure the ExpressBill EDI 9.x plug-in is successfully installed.


To verify plug-in installation

- 1 From the Centricity Practice Solution main menu, click **Administration**.  
The Administration window displays.
- 2 Select **Edit > Plug-Ins**.  
The Plug-ins window displays with the Claim Files Creator tab selected.
- 3 Select the **Statement File Creator** tab.
- 4 Select the desired plug-in, then click **Verify**.  
The File Creator window displays.
- 5 Ensure each item is "available," then click **OK**.
- 6 Select the **File Transmitters** tab, then repeat steps 3 and 4.
- 7 Click **Cancel** to close the Plug-in window.


## Troubleshoot installation

Plug-in file settings are configured automatically when you install the plug-in. If your installation verification failed, compare your plug-in file settings with the settings in the examples that follow. If you find discrepancies, contact your VAR or GE Support.

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 Do not alter these settings unless you know how to create your own plug-ins or have specific instructions from your VAR or GE Support.

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 Before using EDI Submission Management, you must log out of Centricity Practice Solution and close the Internet Explorer® start screen to view recently installed plug-ins.

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The procedure for comparing plug-in file settings for ExpressBill EDI 9.x is ["View ExpressBill EDI 9.x plug-in file settings" on page 8](#).

## View ExpressBill EDI 9.x plug-in file settings

Perform this procedure to compare your ExpressBill plug-in file settings to the settings in the examples.

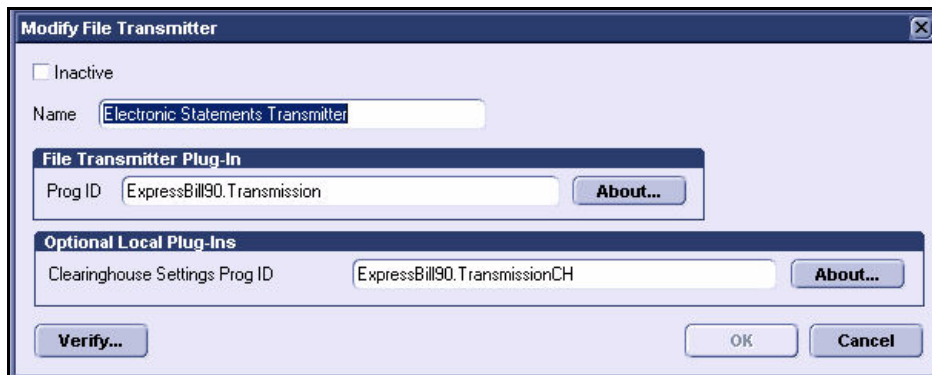
To view the ExpressBill plug-in file settings

- 1 From the Administration window, select **Edit > Plug-ins**.  
The Plug-ins window displays with the Claim File Creators tab selected.
- 2 Select the **File Transmitters** tab, then from the **Name** column select **Electronic Statements File Creator**.



3 Click **Modify**.

The Modify File Transmitter window displays.

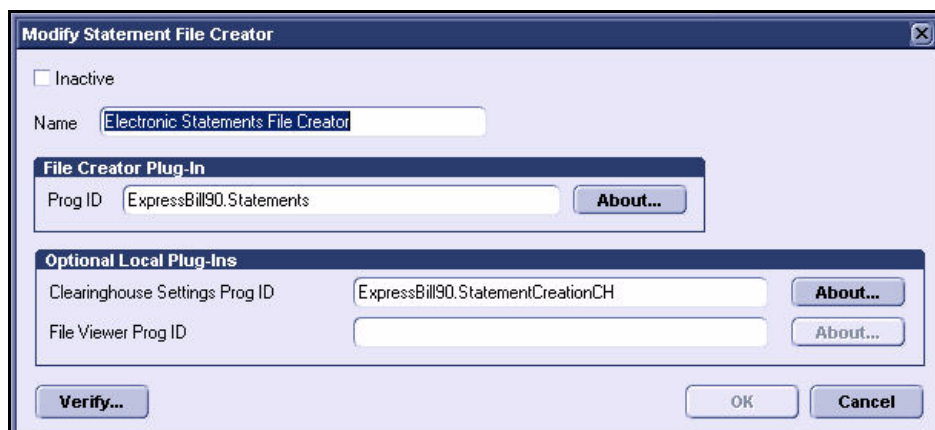


4 Compare your settings with the settings in the example, then click **Cancel**.

5 Select the **Statement File Creators** tab.

6 Select **Electronic Statements File Creator**, then click **Modify**.

The Modify Statement File Creator window displays.



7 Compare your settings with the settings in the example, then click **Cancel**.

8 Click **Cancel** to close the Plug-ins window and return to the Administration window.

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## Set up the clearinghouse

Before you successfully electronically transmit statements to the ExpressBill clearinghouse, you must ensure the Centricity Practice Solution database is set up with the required information. For example, the database must contain clearinghouse-specific information for connecting and logging on, and transmitting files.

Procedures for setting up the clearinghouse are:

- [“Select ExpressBill and access the Edit Clearinghouse Settings window” on page 10](#)
- [“Set up submitter information” on page 11](#)
- [“Set up file transmission” on page 11](#)

### Select ExpressBill and access the Edit Clearinghouse Settings window

Perform this procedure to find the ExpressBill clearinghouse and access the Edit Clearinghouse Settings window. From this window, you enter information that is required to create and transmit electronic statements files.

To select ExpressBill and access the Edit Clearinghouse Settings window

- 1 From the Administration window, select **Edit > Clearinghouses**.

The Find Clearinghouse window displays.

- 2 Click **Search**.

- 3 In the search results, select **ExpressBill**, then click **Edit**.

The Edit Clearinghouse Settings window displays with the File Transmission/Processing tab selected.

**Edit Clearinghouse Settings**

**File Transmission/Processing** | **File Creator**

Inactive

Clearinghouse Name: ExpressBill

ID: 9

**Submitter Information**

Name: \_\_\_\_\_

Contact: \_\_\_\_\_

Phone: ( ) - [ ]

Logon ID: \_\_\_\_\_

Logon Password: \_\_\_\_\_

**Plug-ins**

File Transmission: Electronic Statements Transmitter [Settings...]

File Processor: (none) [Settings...]

Statement Creator: Electronic Statements File Creator [Settings...]

Import...

OK Cancel

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## Set up submitter information

Perform this procedure to enter contact information that enables two-way communication between your site and the ExpressBill clearinghouse.

### Prerequisites

- Obtain site contact and ExpressBill logon information. See [“Collect required information” on page 6](#).
- [“Select ExpressBill and access the Edit Clearinghouse Settings window” on page 10](#).

### To set up submitter information

- ▶ On the **File Transmission/Processing** tab of the Edit Clearinghouse Settings window under **Submitter Information**, complete the fields using the following criteria:

\* – indicates an entry or selection in this field or row is required.

**Recommended** – indicates the suggested setting for ExpressBill.

**Site specific** – indicates site specifications.

Use this field...	To do this...
* Name	<b>Site specific</b> – Enter the name of the company or office that is transmitting files.
* Contact	<b>Site specific</b> – Enter the name of the person the clearinghouse is to contact.
* Phone	<b>Site specific</b> – Enter the phone number of the contact person at this site.
Logon ID	<b>Recommended</b> – Leave blank.
Logon Password	<b>Recommended</b> - Leave blank.

## Set up file transmission

Perform this procedure on computers used to transmit files to the clearinghouse.

### Prerequisites

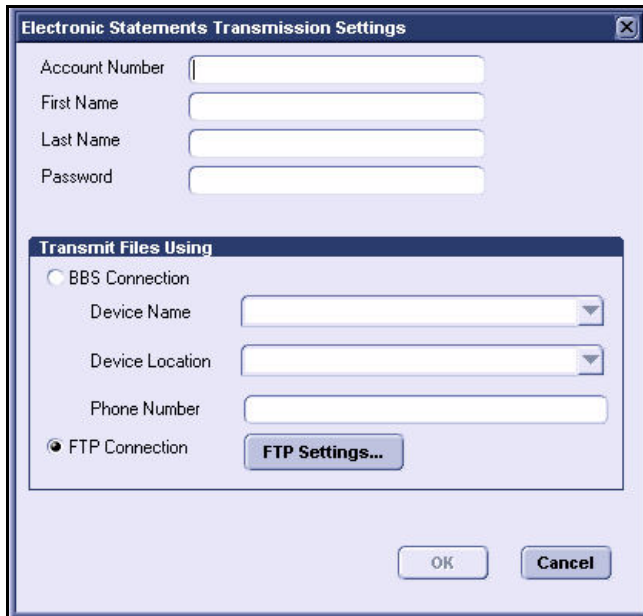
- Obtain connection information. See [“Collect required information” on page 6](#).
- [“Select ExpressBill and access the Edit Clearinghouse Settings window” on page 10](#).

To set up file transmission

- 1 On the **File Transmission/Processing** tab of the Edit Clearinghouse Settings window under **Plugins**, select **Electronic Statements Transmitter** from the **File Transmission** list.

2 Click **Settings**.

The Electronic Statements Transmission Settings window displays.



3 Complete the fields using the following criteria:

\* – indicates an entry or selection in this field or row is required.

**Recommended** – indicates the suggested setting for ExpressBill.

**Site specific** – indicates site specifications.

**Clearinghouse specific** – indicates clearinghouse-specific requirements. Check with the clearinghouse to determine requirements.

Use this field...	To do this...
* Account Number	<b>Clearinghouse specific</b> – Enter your ExpressBill account number (provided by ExpressBill).
* First Name	<b>Clearinghouse specific</b> – Enter one of the following (provided by ExpressBill): <ul style="list-style-type: none"><li>• If you transmit using FTP, enter the full login ID.</li><li>• If you transmit using BBS, enter the 3 alpha characters from the login ID.</li></ul>
* Last Name	<b>Clearinghouse specific</b> – For BBS only. Enter the numeric portion of the login ID (provided by ExpressBill).
* Password	<b>Clearinghouse specific</b> – Enter the logon password for ExpressBill (provided by ExpressBill). <b>Note:</b> The password is case sensitive.

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**Use this field...****To do this...**

\* Transmit Files Using BBS or FTP Connection

**Site specific** – Select the method of transmission selected on your Client Enrollment Form.

If you selected the **Transmit Files Using BBS Connection** option, complete the following fields:

**Use this field... To do this...**

\* Device Name

**Site specific** – Select the name of your connection device, for example the modem name.

\* Device Location

**Site specific** – Select the desired location name.

**Note:** A dial location, which you configure in Windows, is the country code, area code, and specific dialing requirements for the place you are calling from. You can create as many dial locations as you need for different dialing requirements.

\* Phone Number

**Clearinghouse specific** – Enter the following number for dial-up modem connection:

1 800 207 3472

You can use spaces or commas between the numbers, but neither is required.

If a number is required to access an outside line, for example if you need to dial 9 to get an outside line, you would enter:

9 1 800 207 3472

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**Use this field...****To do this...**

If you selected the **Transmit Files Using FTP Connection** option, do the following.

- 1 Click **FTP Settings**.

The FTP Settings window displays.



- 2 Complete the following fields.

**Use this field... To do this...**

- |              |  |
|--------------|--|
| * FTP Server | <b>Clearinghouse specific</b> – Enter the following URL:<br><br><code>ftp.expressbill.com</code> |
| Proxy Server | <b>Recommended</b> – Leave blank.  |

- 3 Click **OK** to save your changes and return to the Edit Clearinghouse Settings window.

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## Modify statement setup

To use the ExpressBill plug-in for processing electronic statements, you need to modify the Centricity Practice Solution database setup to create electronic statement files.

Procedures for modifying statement setup are:

- [“Set up clearinghouse statement file criteria \(optional\)” on page 15](#)
- [“Modify statement options and batch criteria” on page 16](#)

### Set up clearinghouse statement file criteria (optional)

Perform this procedure to specify the number of guarantors included in a file. At this time, ExpressBill does not limit the number of guarantors and there are no restrictions related to file size.

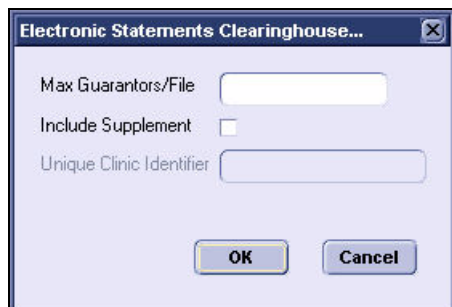
#### Prerequisites

- Enroll for statement processing. See [“Enroll for EDI statement processing” on page 4](#).
- [“Select ExpressBill and access the Edit Clearinghouse Settings window” on page 10](#).

To set up clearinghouse statement file criteria (optional)


- 1 From the Edit Clearinghouse Settings window under **Plug-ins**, select **Electronic Statements File Creator** from the **Statement Creator** list.
- 2 Click **Settings**.

The Electronic Statements Clearinghouse Settings window displays.



- 3 Enter your site's desired number of guarantors per file.
- 4 To produce an optional supplement row that contains additional data, select the **Include Supplement** checkbox and enter the corresponding data in the **Unique Clinic Identifier** field.

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 Selecting the **Include Supplement** checkbox creates the new record type (row 23), which contains the following information: Guarantor's Email Address, ID, Date of Birth, Zip Code, Bill Code Reference, and Unique Clinic Identifier.

If you select the **Include Supplement** checkbox and leave the **Unique Clinic Identifier** field blank, the NPI for either the company or the responsible provider will appear in the new record type (row 23). If **Unique Clinic Identifier** is not blank, the value entered will appear in row 23.

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- 5 Click **OK** to save your changes.
  - 6 From the Edit Clearinghouse Settings window, click **OK**.
  - 7 From the Find Clearinghouse window, click **Close**.

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## Modify statement options and batch criteria

Perform this procedure to associate the clearinghouse with statement options and to specify a statement type.

### Prerequisites

[“Set up the clearinghouse” on page 10.](#)

[“Set up clearinghouse statement file criteria \(optional\)” on page 15.](#)

To modify statement options and batch criteria

- 1 From the **Administration** component, go to **System > Application**.

The Administration – Application window displays.

- 2 Under **Reports**, click **Statement Options**.

The Statement Options window displays.

The screenshot shows the 'Statement Options' dialog box with the 'Options' tab active. The 'Generate statements' section has three radio buttons: 'by provider', 'by company' (selected), and 'by system'. A 'Pay to company' text box is next to the 'by system' option. Below this are several checkboxes for including various information on statements and receipts. At the bottom, there is a 'Clearinghouse' dropdown menu. An arrow points to this dropdown menu with the label 'Clearinghouse'. The 'OK' and 'Cancel' buttons are at the bottom right.

- 3 From the **Clearinghouse** list, select **ExpressBill**.

- 4 Click **OK** to return to the Administration – Application window.

- 5 Click **Save**, then click the close **X** button in the upper right hand corner to close the Administration window.

- 6 From the **Reports** component, select **File > Statements**.

The Statements window displays.



- 7 Select a criteria, then click **Edit**.

The Modify Criteria window displays.

Modify Criteria

Criteria Messages

Name m-z Last Run Date //

Range

Alphabetic m To z Number of Guarantors 50

Day of First Visit To

Calculate

Minimum Patient Balance 5.00 Minimum Total Balance 0.00

Responsible Provider (all)

Facility River Oaks Main

Company (all)

Financial Class (all)

Workers Compensation N/A

Sort Order Alphabetic

Statement Type Plain Paper Statement

Clearinghouse

Interval (days) 30 Minimum days between statements 0

Suppress Guarantors in Collection

OK Cancel

Statement Type

Clearinghouse

- 8 From the **Statement Type** list, select **Electronic Statement**.
- 9 From the **Clearinghouse** list, select **ExpressBill**.
- 10 Click **OK** to save your changes.
- 11 Repeat steps 8 through 11, as required, to change the type of statement and select the clearinghouse for every batch criteria.
- 12 From the Statements window, click **OK**.
- 13 Click the close **X** button in the upper right hand corner to close the Reports window.

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## **The next step**

After you have installed and set up the ExpressBill EDI 9.x plug-in, you are ready to create and transmit statement files. For detailed information, see the Centricity Practice Solution online help.

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## Glossary

<b>Clearinghouse</b>	A company that provides network connectivity to multiple payers. The network is an electronic gateway – routing communications back and forth between healthcare partners and payers, and automatically formatting the data into the standard format required by each payer.
<b>Database</b>	A collection of information organized in such a way that a computer program can quickly select desired pieces of data.
<b>FTP</b>	File transfer protocol. A client/server protocol for exchanging files over the Internet.
<b>Plug-in</b>	An auxiliary application to a software program that is designed to enhance the functionality of the primary program. When installed, the added functionality is automatically integrated into the primary program and as a separate program, the plug-in becomes transparent.
<b>VAR</b>	Valued added reseller. A company whose primary business is providing added value to end-users (customers) by integrating, selling, supporting, and/or servicing a manufacturers hardware and/or software product.

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