

Installing and setting up the CPS HCM 9.x Approval plug-in

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The CPS Hosted ClaimManager 9.x plug-in is an auxiliary program that works with Centricity® Practice Solution 9.0 or later versions, for Centricity EDI customers, to exchange CPS data with an external web application (Ingenix® ClaimsManager 3.4). The CPS HCM 9.x Approval plug-in reviews the data filed on Professional health care claims for clinical accuracy, detecting issues such as invalid codes, bundling issues, global period issues, and duplicate charges.

The CPS HCM 9.x Approval plug-in translates data between CPS and the ClaimsManager in IMF/EMF formats, resulting in an HTML page for each visit. Using the CPS HCM 9.x Approval plug-in, you can analyze clinical data associated with visits prior to filing claims with health care providers.

Follow the instructions in the proceeding sections to

- install and verify the CPS HCM 9.x plug-in
- enter global approval settings
- set up insurance carriers

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.

To make the best use of this document, you should be aware of the conventions used:

Text conventions	Used to indicate...
Menu > Menu Command	What you select from the menu bar; for example, "Select Edit > Companies. "
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	Used for items that you select or click (such as tabs, buttons, fields, and checkboxes). Screen elements that are only referenced are in plain text.
Fixed-width fonts	Text you enter by typing, for example: 1 800 870 1466

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Install the CPS HCM 9.x plug-in

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

To install the CPS HCM 9.x plug-in

- 1 From the CPS main menu, click the **Product Updates** button.
The Centricity Practice Solution Product Installer page opens.
- 2 Click the link **Visit the GE Website for Product Updates** to download updates.
The GE Product Updates page opens.
- 3 Under **Status**, select the **Download Update** or **New Download** link for **CPS HCM 9.x**.
The File Download page opens.
- 4 When the download is complete, select the **Back to Product Update page** link, then the **Back to Product Installer Page** link.
- 5 Perform one of the following:
 - In the **Required** section (for updates to a currently installed plug-in), select the **CPSHCM90** update link to upgrade the plug-in.
 - In the **Optional** section (for a new installation), select the **CPSHCM90** install link to install the plug-in for the first time.
The InstallShield One-Step Install page opens.
- 6 Click **Install**.
The InstallShield Wizard opens.
- 7 Follow the installation instructions to complete the installation.

 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. This is required to add rows to the CPS database, and enables the application to recognize the plug-in and to determine which software modules to execute for the various functions performed by the plug-in.

In the Database Login dialog, enter the following information to configure the database:

- **Server** (The name of the server where the CPS SQL Sever database was installed.)
- **Username** (The username must be **SA** (System Administrator), the primary database user for SQL Server.)
- **Password** (The password for SA.)
- **Database** (The name of the database where CPS was installed.)

For questions on database login information, please contact your IT support personnel.

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.

Verify plug-in installation

Perform this procedure to ensure the CPS HCM 9.x Approval plug-in is successfully installed.

To verify plug-in installation

- 1 From the Centricity Practice Solution main menu, click **Administration**.
The Administration window opens.
- 2 Select **Edit > Plug-Ins**.
- 3 Click the **Approval** tab.
- 4 Select the HCM plug-in, then click **Verify**.
- 5 Ensure each item is "available," then click **OK**.
- 6 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 Centricity Practice Solution Services.



Do not alter these settings unless you know how to create your own plug-ins or have specific instructions from your VAR or Centricity Practice Solution Services.

View CPS HCM 9.x Approval plug-in file settings

Perform this procedure to compare your CPS HCM 9.x Approval plug-in file settings to the settings in the examples.

To view the CPS HCM 9.x Approval plug-in file settings

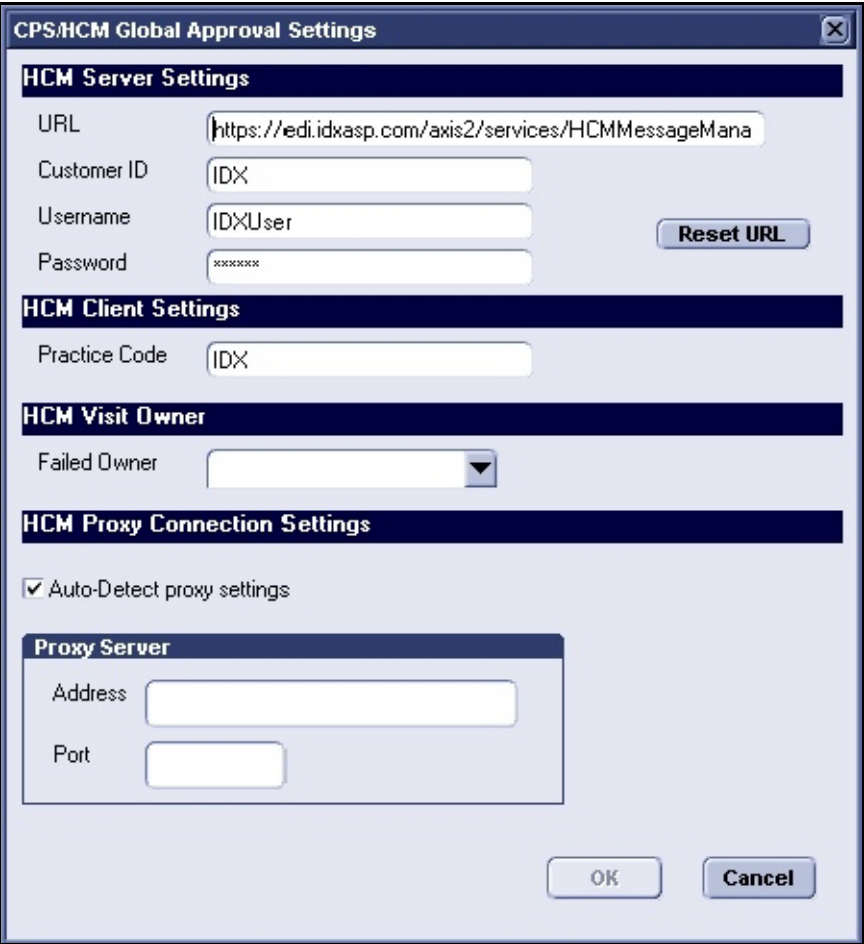
- 1 From the Administration window, select **Edit > Plug-ins**.
The Plug-ins window opens.
- 2 Select the **Approval** tab.
- 3 Select the **HCM** plug-in and click **Modify**. The Modify Approval window opens.
- 4 Verify the following plug-in settings:

Field	Setting
Name	CPS/HCM Visit Approval
Approval Plug-in Prog ID	CPSHCM90.VisitApproval
Global Settings Prog ID	CPSHCM90.GlobalApproval
Insurance Carrier Settings Prog ID	CPSHCM90.InsCarrierApproval

Enter global approval settings


- 1 From the Administration component, select the **System** folder.
- 2 Select **Application**.
- 3 Under **Global Approval Plug-In**, select **CPS/HCM Visit Approval**.
- 4 Select **Settings**.

The CPS/HCM Global Approval Settings window opens.



- 5 Enter the CPS/HCM global approval settings and click **OK**:

Use this field...	To do this...
HCM Server Settings	
URL	Enter https://edi.idxasp.com/axis2/services/HCMMessageManager If necessary, reset the URL value by clicking Reset URL .

Use this field...	To do this...
Customer ID	<p>Enter the Customer ID assigned by Centricity EDI.</p> <hr/> <p> Centricity EDI assigns the Customer ID as part of the client setup to gain access to CEDI. This Customer ID (mnemonic) is configured in the plug-in and used in the authentication process when communicating with CEDI. This setting, in conjunction with the Username and Password listed below, is used to authenticate the exchange of information with the HCM server.</p> <hr/>
Username	Enter the Username received from Centricity EDI for logging into the HCM server.
Password	Enter the Password received from Centricity EDI for logging into the HCM server.
HCM Client Settings	
Practice Code	Enter the Practice Code assigned to your practice.
HCM Visit Owners	
Failed Owner	Select the visit owner for Failed visits.
HCM Proxy Connection Settings	
Auto-Detect proxy settings	Select to auto detect proxy settings.
Proxy server	
Address	Enter the proxy server address.
Port	Enter the proxy server port.

Set up insurance carriers

- 1 From the Administration component, select **Edit > Insurance Carriers**.

The Find Insurance Carrier window opens.

- 2 Search for or select an insurance carrier.

- 3 Select **Edit**.

The Edit Insurance Carrier window opens with the Information tab visible.

- 4 Under **Filing Method**, select the **Electronic** option, then in the **Method** field select the appropriate form.

- 5 Select the **EDI** tab.

- 6 Under **File Creators**, click **New**.

The Insurance Carrier EDI window displays.

- 7 Complete the fields using the following criteria:

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

Site specific –indicates site specifications.

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

Use this field...	To do this...
* Company	Site specific –Select the appropriate company or select (all) to apply settings to every company.
* Filing Method	Site specific –Select the appropriate filing method or select (all) to apply settings to all filing methods.
* Clearinghouse	Clearinghouse specific –Select the appropriate clearinghouse.
* Payer ID	Clearinghouse specific –Enter the appropriate payer ID number.

- 8 Under **Approval**, select **CPS/HCM Visit Approval**.


- 9 Select **Settings**.


The CPS/HCM Ins Carrier Approval Settings window opens.




10 Enter the CPS/HCM Insurance carrier approval settings and click **OK**:


Use this field...	To do this...
Visit Approval	
Disable CPS/HCM Visit Approval for this Carrier	Select this option to disable CPS/HCM Visit Approval for this Insurance Carrier.
Payer Settings	
Payer ID	Enter the payer identification code specific to this Insurance Carrier. If left blank, the plug-in will default to the value of Claim Payer ID.


Field cross reference


 Edit results may vary based on descriptions that change in specific fields. As a result, custom edit rules may not process consistently. For more information, contact your HCM specialist.



ID	Ingenix Field Description	Centricity PM Field	Required
Header			
1	ExtBatchID	IMF file name	Yes
2	ExtBillID	Ticket number in Billing > Visit Info tab	Yes
3	PatientID	Patient ID assigned by the system in Registration	Yes
4	AlternatePatientID	Medical Record Number (MRN) in Registration > Patient tab	No
5	PatientLastName	Patient Last Name in Registration > Patient tab	No
6	PatientMiddleName	Patient Middle Name in Registration > Patient tab	No
7	PatientFirstName	Patient First Name in Registration > Patient tab	No
8	PatientDOB	Birthdate in Registration > Patient tab	Yes
9	PatientGender	Sex in Registration > Patient tab	Yes
10	EntryDate/Time	Visit Entry Date in the in the Billing component > Visit Info tab	No
11	RefPhysID	Patient Referring Provider ID in Administration > Provider Identification tab	No
		 If no provider is on the visit, the referring provider in Patient Reg is used.	
12	RefPhysLName	Referring Provider's Last Name in Billing > Visit Info tab	No
13	RefPhysMName	Referring Provider's Middle Name in Billing > Visit Info tab	No
14	RefPhysFName	Referring Provider's First Name in Billing > Visit Info tab	No

ID	Ingenix Field Description	Centricity PM Field	Required
15	RefPhysTitle	Empty	No
16	RefPhysDept	Taxonomy code associated with the Referring Provider's Specialty.	No
		 Taxonomy codes for Specialities are set up in the Administration component > System User/ Location Setup Specialities.	
17	RefPhysSpec	Empty	No
18	RefPhysDegreeID	Empty	No
19	RefPhysUPIN	Referring Provider UPIN in Administration > Provider Information tab	No
Line Segment			
1	ExtLineID	List order of procedures listed in Procedure View List on the Visit > Charges tab	Yes
2	OrgGroupID	Practice code in CPS/HCM Global Approval Settings window	No
3	OrgID	 This field will populate with a default value of 1.	No
4	LineStatus	 Hardcoded as A (for always Active).	Yes
5	Beg_DOS	Beginning Date of Service (From field) in Billing > Visit > Charges tab > Procedure View List > Charge 1 tab	Yes
6	End_DOS	End Date of Service in Billing (To field) > Visit > Charges tab > Procedure View List > Charge 1 tab	Yes
7	POS	Place of service code in Billing > Visit > Charges tab > Procedure View List > Charge 1 tab	Yes
8	SubProcCode	CPT Code in Billing > Visit > Charges tab > Procedure View List > Charge 1 tab	Yes

ID	Ingenix Field Description	Centricity PM Field	Required
9	AdjProcCode	CPT Code in Billing > Visit > Charges tab > Procedure View List > Charge 1 tab	No
		 The value for AdjProcCode is the same as the SubProcCode.	
10	Sub_Amt	Total Fee on the procedure in Billing > Visit > Charges tab > Procedure View List > Charge 1 tab	No
11	PreAuth	Authorization Number in Billing > Visit > Charges tab > Procedure View List > Charge 1 tab	No
		 If there is no procedure level, the Authorization number is pulled from the visit/claim level.	
12	Srvc_Prvid	Ordering Provider ID in Administration > Provider Identification tab	No
13	SrvcPrvLName	Ordering Provider Last Name in Billing > Visit > Charges tab > Procedure View List > Charge 2 tab	No
14	SrvcPrvMName	Ordering Provider Middle Name in Billing > Visit > Charges tab > Procedure View List > Charge 2 tab	No
15	SrvcPrvFName	Ordering Provider First Name in Billing > Visit > Charges tab > Procedure View List > Charge 2 tab	No
16	SrvcPrvTitle	Ordering Provider Title in Billing > Visit > Charges tab > Procedure View List > Charge 2 tab	No
17	SrvcPrvDept	Taxonomy code associated with the speciality as defined in Administration	No
18	SrvcPrvSpec	Taxonomy code associated with the speciality as defined in Administration	No
19	SrvcPrvDegreeID	Empty	No

ID	Ingenix Field Description	Centricity PM Field	Required
20	SrvcPrv UPIN	Ordering Provider UPIN in Administration > Provider Information tab	No
		 If present on the main Information tab of the Provider, send Provider UPIN. If not present, this data will not be sent.	
21	Bill_Prvid	Dot ID from DoctorFacility, using DoctorFacilityID, and determined according to Note (1)	Yes
22	BillPrvLName	Responsible Provider Last Name in the Billing > Visit Info tab	No
23	BillPrvMName	Responsible Provider Middle Name in the Billing > Visit Info tab	No
24	BillPrvFName	Responsible Provider First Name in the Billing > Visit Info tab	No
25	BillPrvTitle	Responsible Provider Suffix in the Billing > Visit Info tab	No
26	BillPrvDept	Taxonomy code associated with the speciality as defined in Administration	Yes
27	BillPrvSpec	Taxonomy Code associated with the speciality as defined in Administration	Yes
28	BillPrvDegreeID	Empty	No
29	BillPrvUPIN	Empty	No
30	Pri_PayID	Payer ID CPS/HCM Ins Carrier Approval Settings window	Yes
31	Sec_PayID	Empty	No
32	TOS	Procedure Type of Service in Billing > Visit > Charges tab > Procedure View List > Charge 1 > Type of Service field	No
33	Units	Procedure Code Quantity in Billing > Visit > Charges tab > Procedure View List > Charge 1 > Quantity field	Yes
34	ICDCode	Up to four diagnoses separated by ^ in Billing > Visit > Charges tab > Diagnosis View List	Yes

ID	Ingenix Field Description	Centricity PM Field	Required
35	Modifier	Procedure Modifiers in Billing > Visit > Charges tab > Procedure View List > Charge 1	No
36	UserDefinedField 1	Line item control # in Billing > Visit > Charges tab > Procedure View List > Charge 2	No
37	UserDefinedField 2	Facility Dot ID from ecsGetPatientVisit	No
38	UserDefinedField 3	Department Description Administration > Financial > Department	No
39	UserDefinedField 4	Workers' Compensation indicator in Registration > Case Management	No
40	UserDefinedField 5	Insurance Group - Dot ID from InsuranceCarriers Administration > Edit Insurance Group	No
41	UserDefinedField 6	Admit Date in Billing > Visit > Filing (1) > Hospitalization Dates	No
42	UserDefinedField 7	Discharge Date in Billing > Visit > Filing (1) > Hospitalization Dates	No
43	UserDefinedField 8	<hr/>  This user field is currently undefined and open for future updates. <hr/>	No
44	UserDefinedField 9	Visit Owner Description from MedLists where MedListID = VisitOwnerMID from PatientVisit Administration > System > Visit Owner	No
45	UserDefinedField 10	Company Dot ID in Administration > Edit Company	No
46	UserDefinedField 11	Supervising Doctor Dot ID from ecsGetPatientVisit	No
47	UserDefinedField 12	NDC in Billing > Visit > Charges tab > Procedure View List > Charge 1 > UPN/VPN/NDC field	No

ID	Ingenix Field Description	Centricity PM Field	Required
48	UserDefinedField 13	Filing Type in the Billing > Visit Info tab (None, Paper, Electronic)  None = 0, Paper = 1, and Electronic = 2.	No
49	UserDefinedField 14	Type of Doctor (Responsible Provider vs. Other Provider) in Administration > Provider Information  Responsible Provider = 1, and Other Provider = 2.	No
50	UserDefinedField 15	Resource Description from MedLists where MedListId = ResourceTypeld from ResourceTypeAssignments WHERE ResourceId = Appointments.ResourceId, separated by field repetition delimiters Administration > Schedule > Resource Types	No
51	UserDefinedField 16	Financial Class Description from MedLists where MedListId = FinancialClassMid from InsuranceCarriers Administration > Financial > Financial Class	No
52	UserDefinedField 17	EPSDT Note from ecsGetPatientVisitProcs Visit > Charges > Charge 2 tab > EPSDT Note	No
53	UserDefinedField 18	Laboratory Indicator in Billing > Visit > Charges tab > Procedure View List > Charge 2	No
54	UserDefinedField 19	Anesthesia Indicator in Billing > Visit > Charges tab > Procedure View List > Anesthesia tab > Anesthesia	No
55	UserDefinedField 20	Drug Pricing Composite Unit in Billing > Visit > Charges tab > Procedure View List > Tests/Drug/Vision	No
56	UserDefinedField 21	DME Frequency Code Indicator in Administration > Claims > EDI > DMERC	No

ID	Ingenix Field Description	Centricity PM Field	Required
57	UserDefinedField 22	Purchased Service Indicator in Administration > Procedure > Fee Schedules tab > Fee Schedule	No
58	UserDefinedField 23	CalculatedValueUnits from PatientVisitProcs Billing > Visit > Charges tab > Procedure View List > Anesthesia tab	No
59	UserDefinedField 24	Alternate Payer Dot ID from InsuranceCarriers Alternate Payer in Administration > Insurance Carriers > Information tab	No
60	UserDefinedField 25	FeeSchedule Dot ID from ecsGetPatientVisitProcs Administration > Fee Schedules	No
61	Digit	Empty	No
62	Bilateral	Empty	No
63	Not currently used	Empty	No

The next step

After you have installed and set up the CPS HCM 9.x Approval plug-in, you are ready to begin using the plug-in.