Description: In this article, the user will learn how to create a new manual EDI/837 billing batch. This is a manual process to make updates and corrections to data in the EDI/837 file generated in a billing batch. Examples of why updates and corrections are needed to the EDI/837 file, incorrect data was submitted to the funding source, or the file was submitted and denied by the funding source for incorrect data i.e., Medicaid numbers or authorization numbers, etc. Any data updates or corrections made will need to be updated in DCI for future billing batches to be successful.

All three procedures must be completed for the EDI/837 transmission file to be generated for resubmission to the funding source.

*Please note: EDI/837 needs to be enabled in your organization's instance-level setting and enabled on the funding source. Please submit a support ticket for assistance.

Roles: Super User, Billing Team
Permissions: N/A

Contents

1. Create Manual EDI/837 Billing Batch

1. Log in to your personal profile
2. Select **Billing** from the main menu
3. Select **Batches** from the submenu
4. Click the **Actions** button
5. Select **New Manual EDI/837 Billing Batch** from the drop-down menu
6. Complete the **form wizard** on the Create Manual EDI/837 Billing Batch screen
    a. Required Fields
        i. Name – Type Batch Name
        ii. Funding Source – Select Funding Source from the drop-down
            1. Please note: If your funding source is not listed, EDI/837 has not been enabled for the funding source. Please submit a support ticket for assistance.
    b. Select **Next**
    c. Review the Batch Summary tab in the form wizard

d. Select **Save**

e. Select **Yes** in the confirmation alert window

7. The Batch Details page will be displayed. The batch is created and in approved status.
   a. The batch will be listed in the Batches table. To view the batches table, select Billing on the main menu and Batches on the submenu.
8. Take note of the Batch ID for the manual EDI/837 billing batch created to update in the EDI/837 CSV file

2. Download and Update EDI/837 Raw Dump File

1. Log in to your personal profile
2. Select **Billing** from the main menu
3. Select **Batches** from the submenu
4. Locate the Batch with the EDI/837 CSV file needing to be updated and manually processed
5. Select the **Batch** from the Batches table by clicking anywhere in the batch row
6. In the EDI Details widget on the Batch Details page, select the **blue hyperlink** for the **EDI/837 Raw Dump File** to download
   a. Please note: The EDI/837 Raw Dump File template is specific for the funding source
7. **Update the Batch ID number** to the new manual EDI/837 billing batch created in procedure #1 - Create Manual EDI/837 Billing Batch
8. Add the following column headers before the first column, SenderID, on the file. Please note, these columns must be present and in the format and order outlined below; however, data does not need to be present in the fields.
   a. ClaimTypeCode
   b. ICN
   c. PayerIdentifier
   d. ProviderId
   e. FundingSourceName
   f. PayerClaimControlNumber
9. **Update and make corrections to data** for successful EDI/837 file generation/upload
   a. Examples: Medicaid numbers, authorization numbers, fields listed on the EDI/837 Raw Dump File
   b. Please note: Updates or corrections made within the file will need to be corrected within DCI for future billing batches to be successful

10. **Save the file**

3. Upload EDI/837 CSV and Generate EDI/837 for Manual EDI/837 Billing Batch

1. Log in to your personal profile
2. Select **Billing** from the main menu
3. Select **Batches** from the submenu
4. Select the **Manual EDI/837 Billing Batch** from the Batches table by clicking anywhere in the row of the batch

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      a. The manual EDI/837 billing batch was created in procedure #1 – Create Manual EDI/837 Billing Batch

5. Select the **Upload EDI CSV and Generate EDI** button
6. Click the **Add Attachment** next to Choose File
7. Locate the updated **file** for upload
      a. This is the file updated from procedure #2 - Download and Update EDI/837 Raw Dump File
8. Select the **file** and **click open**
9. DCI will upload the file and display a success message in the Upload EDI/837 Raw Dump File and Generate EDI/837 window
      a. If an alert displays in the Upload EDI/837 Raw Dump File and Generate EDI/837 window, the file is not configured as per the funding source. Please review procedure #2 - Download and Update EDI/837 Raw Dump File.
10. Click **Save**
11. Click **Yes** in the confirmation alert window
12. The Batch Details page will be displayed, and the status will be EDI/837 Generation InProcess.
      a. This process can take up to ten minutes
13. The status will update to EDI/837 Generated
14. Select the **file** next to the **EDI/837 Transmission File field**, in the EDI Details widget.
15. Select the **file** next to the **Name field** in the Attachment Details widget to download.
16. **Save** the file
17. Proceed with your organization and funding source file upload procedure