



# Truli for Health

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## **HIPAA Transaction Standard Companion Guide**

For Availity<sup>®1</sup> Health Information Network Users

Refers to the Technical Report Type (TR3) Based on  
ASC X12 Version 005010X222A1

## **837 I – Health Care Claim Institutional**

Companion Guide Version Number: 1.0

<sup>1</sup>Availity, LLC, is a multi-payer joint venture company. For more information or to register, visit [availity.com](http://availity.com).

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## Disclosure Statement

The Truli for Health HIPAA Transaction Standard Companion Guide for EDI Transactions Technical Reports, Type 3 (TR3) provides guidelines for submitting electronic batch transactions. Because the HIPAA ASC X12-TR3s require transmitters and receivers to make certain determinations /elections (e.g., whether, or to what extent, situational data elements apply) this Companion Guide documents those determinations, elections, assumptions or data issues that are permitted to be specific to Truli for Health business processes when implementing the HIPAA ASC X12 5010 TR3s.

This Companion Guide does not replace or cover all segments specified in the HIPAA ASC X12 TR3s. It does not attempt to amend any of the requirements of the TR3s or impose any additional obligations on trading partners of Truli for Health that are not permitted to be imposed by the HIPAA Standards for Electronic Transactions. This Companion Guide provides information on Truli for Health specific codes relevant to Truli for Health business processes, rules and situations that are within the parameters of HIPAA. Readers of this Companion Guide should be acquainted with the HIPAA ASC X12 TR3s, their structure and content.

This Companion Guide provides supplemental information that exists between Truli for Health and its trading partners. Trading partners should refer to their trading partner Agreement for guidelines pertaining to Availity, LLC legal conditions surrounding the implementation of the EDI transactions and code sets. However, trading partners should refer to this Companion Guide for information on Truli for Health business rules or technical requirements regarding the implementation of HIPAA-compliant EDI transactions and code sets.

Nothing contained in this Companion Guide is intended to amend, revoke, contradict or otherwise alter the terms and conditions of your applicable trading partner agreement. If there is an inconsistency between the terms of this Companion Guide and the terms of your applicable trading partner agreement, the terms of the Trading partner agreement will govern. If there is an inconsistency between the terms of this Companion Guide and any terms of the TR3, the relevant TR3 will govern with respect to HIPAA edits and this Companion Guide will govern with respect to business edits.

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**Version Change Log**

Date	Description	Page
05-14-2020	Initial document creation	NA

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## 1 INTRODUCTION

The Health Insurance Portability and Accountability Act (HIPAA) requires the health care industry in the United States to comply with the electronic data interchange (EDI) standards as established by the Secretary of Health and Human Services. The Technical Reports Type 3 Guides (TR3s) for the ANSI 837 I Health Care Claim Institutional transaction specifies in detail the required formats. It contains requirements for the use of specific segments and specific data elements within segments and was written for all health care providers and other submitters. It is critical that your software vendor or IT staff review this document carefully and follow its requirements to send HIPAA-compliant files to Truli for Health via your vendor. The ASC X12 005010X222A1 is the established standard for Health Care Institutional Claims (837I).

### 1.1 Scope

This ANSI 837 I Companion Guide was created for Truli for Health trading partners to supplement the ANSI 837 I TR3. It describes the data content, Truli for Health business rules and characteristics of the 837 I transaction. If you submit your transactions through Availity, please also refer to the Availity EDI guide [Availity.com](https://www.availity.com).

### 1.2 Overview

The Technical Report Type 3 Guide (TR3) for the 837 I Health Care Institutional Claim transactions specifies in detail the required formats. It contains requirements for the use of specific segments and specific data elements within segments and was written for all health care providers and other submitters. It is critical that your software vendor or IT staff review this document carefully and follow its requirements to send HIPAA-compliant files to Truli for Health via your vendor.

### 1.3 References

- TR3 Guides for ASC X12 005010X222A1 Health Care Institutional Claim (837 I) and all other HIPAA standard transactions are available electronically at the Washington Publishing website, [wpc-edi.com](https://www.wpc-edi.com).
- For more information, including an online demonstration, please visit [Availity.com](https://www.availity.com) or call 800-282-4548.
- CAQH CORE Operating Rules Phase II [caqh.org/CORE\\_operat\\_rules.php](https://caqh.org/CORE_operat_rules.php)

## 2 GETTING STARTED

### 2.1 Working with Truli for Health

Availity optimizes information exchange between multiple health care stakeholders through a single, secure network. The Availity Health Information Network encompasses administrative, financial, and clinical services, supporting both real-time and batch EDI via the web and through business to business (B2B) integration. For more information, including an online demonstration, please visit [Availity.com](https://www.availity.com) or call 800-282-4548.

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## 2.2 Trading partner Registration

In order to register, you will need:

- Basic information about your practice, including your Federal Tax ID and National Provider Identifier.
- Someone with the legal authority (typically an owner or senior partner) to sign agreements for your organization.
- An office manager or other employee who can oversee the Availity implementation and maintain user ids and access.

## 2.3 Certification and Testing Overview

All trading partners and clearing houses should be certified via Availity. It is recommended that the trading partner obtain HIPAA certification from an approved testing and certification third party vendor prior to testing.

# 3 TESTING WITH TRULI FOR HEALTH AND AVAILITY

Truli for Health recommends that trading partners contact Truli for Health to obtain a testing schedule and or notify Truli for Health of potential testing opportunities prior to implementing any foreseen transaction impacts to the business flow of both Truli for Health and/or the trading partner.

# 4 CONNECTIVITY/COMMUNICATIONS WITH TRULI FOR HEALTH AND AVAILITY

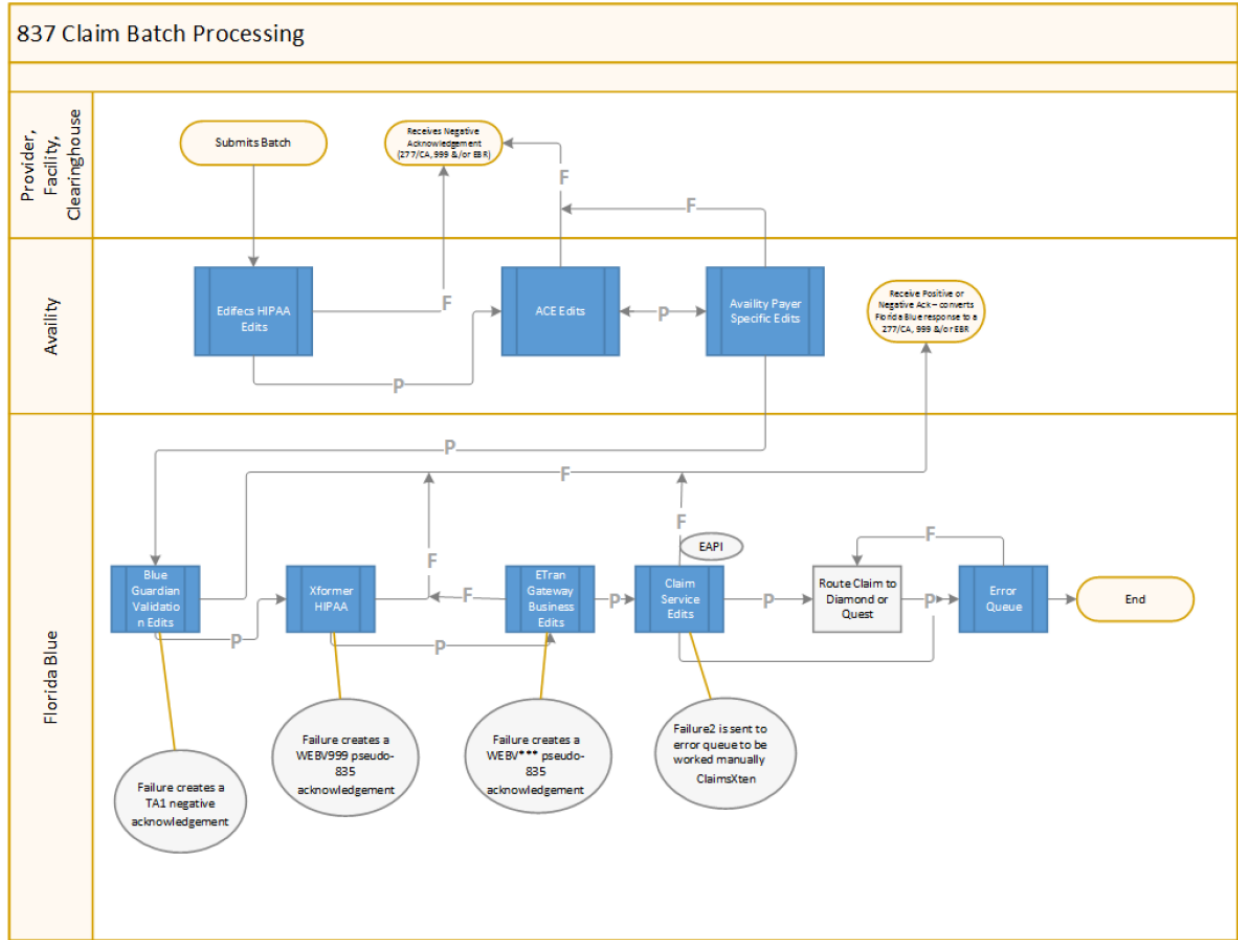
## 4.1 Process Map

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# Truli for Health Plan Companion Guide ANSI 837I Health Care Claim Institutional Transaction Type



## 4.2 Transmission Administrative Procedure

Connectivity

Secure File Transfer via Internet

FTP via ISDN, Leased Lines, Frame Relay, VPN

Firewall Mechanics

If you are behind a firewall, make sure that your FTPS client passes the Internet facing IP address of the server rather than the internal IP. Failure to do so usually causes the communication break when the client tries to list the files available in the server or during upload or download of files.

## 4.3 Re-Transmission Procedure

Encryption Method

Secure Socket Layer (SSL)

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## 4.4 Communication Protocol Specifications

### Protocols Used

- HTTPS/FTPS
- HTTPS and your common Internet browsers (IE, Firefox, etc.) Port 443 (default)
- FTPS: Any FTP client capable of SSL encryption
- Client examples are:
  - Valicert ftp client
  - Cute-FTP
  - WS-FTP Pro
  - FileZilla
  - Others
- FTPS Parameters:
  - Port 21
  - Authentication:FTP over SSL (explicit) or FTP over TLS (explicit)
  - Active Mode
  - File retention is 72 hours
- SSH Parameters
  - Use SFTP or SCP
  - Port 22
  - Authentication:user id and password

## 4.5 Passwords

If a password change is necessary, please contact Availity at 800-282-4548 or [Availity.com](http://Availity.com).

# 5 CONTACT INFORMATION

## 5.1 EDI Customer Service

For EDI customer service related to Truli for Health, please visit [Availity.com](http://Availity.com) or call 800-282-4548.

## 5.2 EDI Technical Assistance

For support of EDI transactions through Availity, please visit [Availity.com](http://Availity.com) or call 800-282-4548.

## 5.3 Provider Service Number

For provider services, please contact Truli for Health at 823-238-8144. For faster service, please have your Availity transaction id available.

## 5.4 Applicable websites/email

- [Availity.com](http://Availity.com)

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- [Truli for Health.com](http://Truli for Health.com)

## 6 CONTROL SEGMENTS/ENVELOPES

ANSI 837 I- Health Care Institutional Claim

The purpose of this section is to delineate specific data requirements where multiple valid values are presented within the 5010 TR3.

- **Interchange control header (ISA06) Interchange Sender ID (Mailbox ID)** – is individually assigned to each trading partner.
- **Interchange control header (ISA08) Interchange Receiver ID** - If submitting directly to Truli for Health use, 592015694 (+6 spaces). If submitting through Availity, use 030240928 (+6 spaces). Reference the Availity EDI guide at [Availity.com](http://Availity.com)
- **Interchange control header (ISA15) Usage Indicator** – defines whether the transaction is a test (T) or production (P).
- **Functional Group Header (GS02) Application Sender’s code** – is individually assigned to each trading partner.

### Global Information

Req #	Loop ID – Segment Description & Element Name	TR3 Data Element	TR3 Page(s)	Plan Requirement
G1	All Transactions for Availity Users only			Truli for Health requires a trading partner agreement to be on file with Availity indicating all electronic transactions the trading partner intends to send or receive.
G2	All Segments			Only loops, segments, and data elements valid for the 837 HIPAA-AS TR3 Guides ASC X12 005010X223A2 will be used for processing.

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Req #	Loop ID – Segment Description & Element Name	TR3 Data Element	TR3 Page(s)	Plan Requirement
<b>G3</b>	<p>Acknowledgments –</p> <p>Truli for Health acknowledgements are created to communicate the status of files or claims. It is imperative that they be retrieved on a daily basis. One file could result in multiple acknowledgements.</p> <p><b><u>ANSI X12:</u></b></p> <p><b>-TA1 – Interchange Acknowledgement</b></p> <p><b>-999– Functional Acknowledgement</b></p>			<p>TA1 is available immediately after depositing file</p> <p>999 is available immediately after depositing file</p> <p>Files and/or claims that do not pass edits are indicated on these acknowledgements and must be corrected and resubmitted.</p> <p>Availity Users: Availity will forward Truli for Health acknowledgements to the submitter. Please refer to the Availity EDI Guide at <a href="http://Availity.com">Availity.com</a>.</p>
<b>G4</b>	<b>Negative Values</b>			Submission of any negative values in the 837 transaction is not allowed.
<b>G5</b>	<b>Date fields</b>			All dates submitted on an incoming 837 Health Care Institutional Claim must be a valid calendar date in the appropriate format based on the respective HIPAA-AS TR3 qualifier. Failure to do so may cause processing delays or rejection.
<b>G6</b>	<b>Batch Transaction Processing</b>			Generally, Availity and Truli for Health Gateways accept transmissions 24 hours a day, seven days a week
<b>G7</b>	<b>Multiple Transmissions</b>	All Segments		Any errors detected in a transaction set will result in the entire transaction set being rejected.
<b>G8</b>	<b>All Transactions – B2B / EDI</b>			Truli for Health requires that -(dashes) be removed from all Tax IDs, SSNs and Zip codes.
<b>G9</b>	<b>All Transactions</b>			Health Care Institutional Claims submitted with multiple patient events will be split into separate transactions and returned one at a time.
<b>G10</b>	<b>All Transactions</b>			Truli for Health requires that no special characters be submitted in any text fields.

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Req #	Loop ID – Segment Description & Element Name	TR3 Data Element	TR3 Page(s)	Plan Requirement
G11	Transaction Balancing	All Segments		All transactions must follow the 5010 TR3 rules of balancing. This includes the COB segments.

Enveloping Information – 837 Institutional Claim Submission

Req #	Loop ID - Segment Description & Element Name	TR3 Data Element	TR3 Page(s)	Plan Requirement
E1	Interchange Control Header Authorization Information Qualifier	ISA01	Appendix C (C.4)	Truli for Health requires 00 in this field.
E2	Interchange Control Header Authorization Information	ISA02	Appendix C (C.4)	Truli for Health requires ten spaces in this field.
E3	Interchange Control Header Security Information Qualifier	ISA03	Appendix C (C.4)	Truli for Health requires 00 in this field.
E4	Interchange Control Header Security Information	ISA04	Appendix C (C.4)	Truli for Health requires ten spaces in this field.
E5	Interchange Control Header Interchange ID Qualifier	ISA05	Appendix C (C.4)	Truli for Health requires 01 in this field.
E6	Interchange Control Header Interchange Sender ID	ISA06	Appendix C (C.4)	Truli for Health requires submission of your individually assigned Truli for Health sender mailbox number in this field.
E7	Interchange Control Header Interchange ID Qualifier	ISA07	Appendix C (C.5)	Truli for Health requires ZZ in this field.
E8	Interchange Control Header Interchange Receiver ID	ISA08	Appendix C (C.5)	Truli for Health will only accept the submission of the Tax ID number 592015694 in this field.
E9	Interchange Control Header Acknowledgement Requested	ISA14	Appendix C (C.6)	The TA1 will not be provided without a code value of one in the field.
E10	Interchange Control Header Functional Group Header/Functional Group Trailer	GS - GE ISA - IEA	Appendix C (C.7)	Truli for Health will only process one transaction type per GS-GE (functional group). However, we will process multiple ST's within one (1) GS-GE group as long as they are all the same transaction type.
E11	Functional Group Header Functional Identifier Code	GS01	Appendix C (C.7)	HC– Health Care Claim - Institutional  Truli for Health requires submission of the above value in this field.
E12	Functional Group Header Application Sender's Code	GS02	Appendix C(C.7)	Truli for Health requires the submission of the Truli for Health assigned Sender Code in this field.

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Req #	Loop ID - Segment Description & Element Name	TR3 Data Element	TR3 Page(s)	Plan Requirement
E13	Functional Group Header Application Receiver's Code	GS03	Appendix C (C.7)	592015694 Truli for Health requires the submission of the above value in this field for 837 Institutional Claim Submission, all others may cause rejection.
E14	Implementation Convention Reference	ST03	67	Must contain 005010X223A2.

## 7 PAYER SPECIFIC BUSINESS RULES AND LIMITATIONS

### Business Requirements

Trading partners and providers' failure to abide by these requirements will result in provider correctable errors and must be corrected and resubmitted.

Req #	Loop ID – Segment Description & Element Name	TR3 Data Element	TR3 Page(s)	Plan Requirement
B1	1000A – Submitter Primary Identification Number  Submitter Identifier	NM109	72	Truli for Health requires the submission of the Truli for Health assigned Sender Code in this data element.
B2	1000A – Submitter EDI Contact Information  Submitter Contact Name	PER 02	74	Required when the contact name is different than the name contained in the Submitter Name segment of this loop and it is the first iteration of the Submitter EDI Contact Information (PER) Segment.
B3	1000B – Receiver Name  Last Name or Organization Name	NM103	77	TRULI  Truli for Health requests submission of above value in this field.
B4	1000B – Receiver Name  Receiver Primary Identification Number	NM109	77	460606080  Truli for Health requires submission of above value in this field.

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Req #	Loop ID – Segment Description & Element Name	TR3 Data Element	TR3 Page(s)	Plan Requirement
B5	2000A – Billing Provider Specialty Information	PVR03	80	<p>Taxonomy codes are required by Truli for Health under specific circumstances. Taxonomy is one of several data elements used by Truli for Health to help determine the appropriate provider record for processing. In cases where the NPI is shared by multiple provider entities, specialties or locations, the taxonomy becomes a critical data element. For example:</p> <p>ABC Hospital, Urgent Care, Lab and Physician PA group all share the same NPI. In this case, the taxonomy becomes critical to ensure appropriate processing and fee schedule assignment.</p> <p>Taxonomy codes and descriptors are located at <a href="http://nucc.org">nucc.org</a>.</p>
B6	2000C – Patient Hierarchical Level	PAT01	133	<p>Truli for Health does not accept ANSI 837I transactions which have the PAT01 segment equal to 39 (organ donor).</p> <p>Organ donor claims should be submitted on a UB04 with the appropriate supporting documentation.</p>
B7	2010AA – Billing Provider Postal Code	N4	88	Truli for Health requires submission of a valid nine digit postal zip code.
B8	2010AA – Billing Provider NPI Reference Identification Code	NM109	90	<p>Truli for Health requires the billing providers NPI.</p> <p>Invalid or missing NPI will result in claims being returned as a provider correctable error. These must be corrected and resubmitted electronically.</p>
B9	2010AA – Billing Provider Contact Name Billing Provider Contact Name	PER02	92	Required in the first iteration of the Billing Provider Contact Information Segment.
B10	2010AB – Pay to Provider Postal Code	N4	98	Truli for Health requires submission of a valid nine digit postal zip code.

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Req #	Loop ID – Segment Description & Element Name	TR3 Data Element	TR3 Page(s)	Plan Requirement
B11	<b>2010BA – Subscriber Name</b> Subscriber First Name	NM104	113	Required when NM102 = one (Person) and the person has a First Name.
B12	<b>2010BA – Subscriber Name</b> <b>Identification Code Qualifier</b>	NM109	114	Truli for Health requires MI in NM108.
B13	<b>Subscriber Primary Identifier</b>	NM109	114	Truli for Health requires submission of the ID number in NM109 exactly as it appears on the member's ID card.  Do not use any embedded spaces or the claim could be returned as a provider correctable error and must be corrected and resubmitted.
B14	<b>2010BA – Subscriber Gender Code</b>	DMG03	119	Truli for Health requires submission of the Subscriber's Gender Code.
B15	<b>2010BB – Payer Name</b> <b>Payer Name</b>	NM103	123	Truli for Health  Truli for Health requires submission of above value in this field.
B16	<b>2010BB – Payer Name</b> <b>Qualifier</b>	NM109	123	PI – Payer Identification
B17	<b>Payer ID</b>	NM109	123	TRULI  Truli for Health Payer Identifier
B18	<b>2010CA – Patient First Name</b>	NM104	136	Truli for Health requires submission of the Patient's First Name.
B19	<b>2010CA – Patient's Gender Code</b>	DMG03	141	Truli for Health requires submission of the Patient's Gender Code.
B20	<b>Coordination of Benefits (COB) Balancing</b>	2300	143	Total Claim Charge Amount and Service Line Charges must balance. CLM02 must be equal to sum of the service line charge amounts (sum of the SV102's).

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Req #	Loop ID – Segment Description & Element Name	TR3 Data Element	TR3 Page(s)	Plan Requirement
B21	2300 – Claim Information / 2400 – Service Line Number  Monetary Amount  Line Item Charge Amount	CLM02  SV203	145  427	The total claim charge amount must equal the sum of all submitted line items. Failure to do so will result in claims being returned as a provider correctable error and must be corrected and electronically resubmitted.  Note: If the whole dollar amounts are sent in monetary elements, do not include the decimal or trailing zero (e.g. \$30 = 30).  When indicating the dollars & cents, the decimal must be indicated (e.g. \$30.12 = 30.12)
B22	2300 – Claim Information  Claim Frequency Type Code	CLM05-3	145	Truli for Health will accept only the following codes:  0 = Non- Payment/Zero  1 = Admit Through Discharge Claim  2 = Interim – First Claim  3 = Interim – Continuing Claim  4 = Interim – Last Claim  5 = Late Charge(s) Only  7 = Replacement of Prior Claim  8 = Void/ Cancel of Prior Claim Note: When submitting the corrected claim, the original Reference Number (ICN/DCN) also known as the Original Claim Number, is required to be sent in loop 2300 REF.  (REF01=F8 qualifier for Original Reference Number, REF02 = Original Claim Number).
B23	2300 – Claim Supplemental Information  Paperwork  Claim Note	PWK  NTE	154  178	At this time, Truli for Health will not be utilizing information in these segments for electronic claim processing.

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Req #	Loop ID – Segment Description & Element Name	TR3 Data Element	TR3 Page(s)	Plan Requirement
B24	<b>2300 – Claim Information Health Care Diagnosis Code</b>	HI	184-304	Truli for Health requires that you do not transmit the decimal points in the diagnosis codes. The decimal point is assumed.
B25	<b>2300 – HI - VALUE INFORMATION</b>  Value code of A0 2300 HIxx-2 where HIxx-1 = BE segment	HI	284-293	Plans must validate the point of pickup zip code for air ambulance service on claims with dates of service beginning April 19, 2015. Validation is based on the following CMS guidelines for air ambulance claims: For electronic claims, validate the origin information (zip code of the point of pickup), as sent in the Ambulance Pick-Up Location Loop in the ASC X12N Health Care Claim (837) Institutional. If the zip code is not in the Plan's service area, the claim must be rejected.
B26	<b>2300 – Claim Information Health Care Diagnosis Code</b>	HI	184-304	Clinical trial number (loop 2300, REF02) is required when V707 (ICD-9) or Z00.6 (ICD-10) is in diagnosis position 1 or 2 (loop 2300, HI01-2 or HI02-2).
B27	<b>2310A – Attending Provider Specialty Information</b>	PRV03	322	Taxonomy code is one of several data elements used by Truli for Health to help determine the appropriate provider record for processing. Please include taxonomy code when submitting attending provider information.  Taxonomy codes can be located at <a href="http://nucc.org">nucc.org</a>
B28	<b>2310D – Rendering Provider NPI</b>  Rendering Provider Identifier	NM109	336	When a rendering provider is submitted, Truli for Health requires the rendering provider's NPI be submitted for all claims. Invalid or missing NPI will result in claims being returned as a provider correctable error and must be corrected and electronically resubmitted.
B39	<b>2310C – Service Facility Location</b>  Postal code	N4	345	Truli for Health requires submission of a valid nine digit postal zip code.

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Req #	Loop ID – Segment Description & Element Name	TR3 Data Element	TR3 Page(s)	Plan Requirement
B30	Coordination of Benefits (COB) Balancing	2320	354	Total Claim Charge Amount and sum of service lines must balance. (CLM02) must be equal to sum of the service line charge amounts (sum of the SV102's).
B31	2320 – Other Subscriber Information  Claim Filing Indicator Code	SBR09	356-357	In Loop 2320, if SBR09=MA the Medicare Report Number should be reported in Loop 2330B REF.  <b>Note:</b> SBR09=MB is not allowed for the BCBSF Systems.
B32	2330B – Other Payer Name	REF01  REF02	384	In Loop 2320, if SBR09=MA; then the Medicare Report Number needs to be reported in Loop 2330B, in the following REF segment configuration:  <ul style="list-style-type: none"> <li>• REF01=F8</li> <li>• REF02=Medicare Report Number=Medicare ICN</li> </ul> <b>Note:</b> SBR09=MB is not allowed for the BCBSF Systems.
B33	2400 – Service Line Number  Assigned Number	LX01	423	For Institutional claims Truli for Health will only allow and process 450 service lines per claim. Claims greater than 450 service lines will be returned as a provider correctable error.
B34	2400 – Service Line Number  Product/Service ID Qualifier	SV202-1	425	HC  Truli for Health requires submission of above value in this field as only HCPCS Procedure codes are accepted by Truli for Health at this time.
B35	2400 – Service Line Number  Line Item Charge Amount	SV203	427	The total claim charge amount must equal the sum of all submitted line items. Otherwise will result in claims being returned as provider correctable error and must be corrected and electronically resubmitted.  Note: If the whole dollar amounts are submitted, do not include a decimal or trailing zero (e.g. \$30 = 30). When indicating the dollars & cents, the decimal must be indicated (e.g. \$30.12 = 30.12).
B36	2400 – Service Line Number  National Drug Code (NDC)	LIN03	451	NDC Format must be eleven numeric digits in 5-4-2 format. Other characters or formats are not allowed.

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Truli for Health Plan Companion Guide ANSI 837I Health Care Claim Institutional Transaction Type

Req #	Loop ID – Segment Description & Element Name	TR3 Data Element	TR3 Page(s)	Plan Requirement
B37	2400 – Service Unit Count	SV2 05	428	Truli for Health requires submission of Service Unit Count.

NDC Quantity

Truli for Health NPI Attributes Requirements																									
Claims PROVIDER TYPES	NPI						Taxonomy						EIN (Tax ID)						Zip + 4 Digit						
	Institutional			Professional			Institutional			Professional			Institutional			Professional			Institutional			Professional			
	IG	B	A	I	BC	A	IG	B	A	I	B	A	IG	B	A	I	BC	A	IG	B	A	IG	B	A	
Billing Provider	R	R	R	R	R	R	S	R	R	S	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R
Pay To																			S	R	R	S	R	R	
Rendering Provider	S	S	R	S	R	R				S	R	R													
Referring Provider	S	S		S	S*	S																			
Ordering Provider				S	S*	S																			
Supervising Provider				S	R	R																			
Servicing Facility	S	S	S	R	R	S													R	R	R	R	R	R	
Attending	S	R	R				S	R	R																
Operating	S	R	R																						
Other Operating Physician	S	R																							
Purchase Service Provider				S	S																				

<b>Legend:</b>
R - Required
S - Situational
Blank - Not Available
IG - Implementation Guide
BC - Blue Cross
A - Availability

**Helpful Tips: How to Avoid Provider Identification Errors for Claims involving National Provider Identifier (NPI) and Tax ID number.**

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## Truli for Health Plan Companion Guide ANSI 837I Health Care Claim Institutional Transaction Type

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Below are reminders to help you reduce the number of WEBV040 and WEBV042 claims errors displayed when claim data (or information) does not match information registered with Truli for Health.

### Billing Provider Section

This section is used to provide information regarding the billing provider for services rendered. It should match the name written on the check or electronic funds transfer from Truli for Health.

- i. **OPTION 1:** If you are registered as a group provider (PA, LLC, etc.) with Truli for Health and you want to bill as a group provider, enter the appropriate group name, Tax ID number and the group NPI (type two).
  0. **THE MATCH:** Group Name matches Group NPI matches Group Tax ID
- ii. **OPTION 2:** If you are registered as an individual provider with Truli for Health and you are billing as an individual provider, please enter your name, Social Security Number and your individual NPI (type one).
  0. **THE MATCH:** Individual Name matches Individual NPI matches Individual Social Security Number

### Rendering Provider Section

This section is used to provide information regarding who performed the services. It is the provider who actually sees the patient.

- iii. **OPTION 1:** If you billed as an organization (PA, LLC, etc.) list the name of the rendering individual provider and the rendering individual NPI.
- iv. **OPTION 2:** If you billed as an individual, do not list a rendering provider. This would be redundant as the billing individual would be the same as the **rendering** individual. Submitting redundant information can cause a different provider correctable error.

Below is an example to assist you in understanding the appropriate entry of billing and rendering provider information to reduce the number of returned claims.

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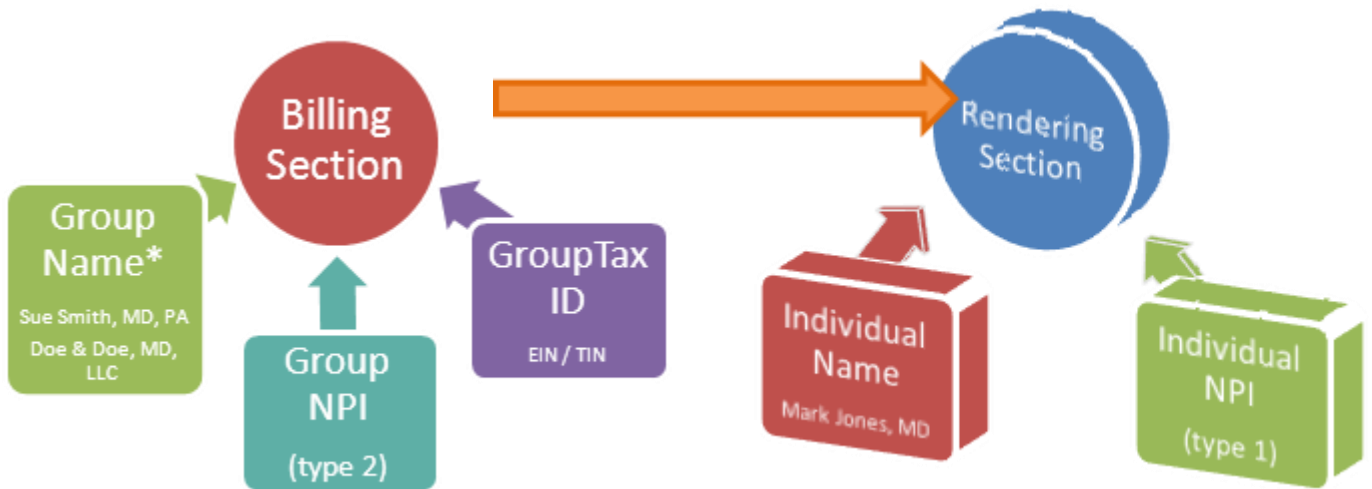
**Billing as a Group Provider – OPTION 1**

If you are billing as a group provider, (PA, LLC, etc.), the NPI must be the Group NPI (type 2) along with the appropriate Tax ID number for the group.

**Please note that the Billing Section is for the entity BILLING for the services. The Rendering Provider Section is for the provider who PERFORMED the services.**

**Correct Entry (THE MATCH):**

This example shows how the information submitted matches data registered with Truli for Health. The Group Name matches Group NPI which matches Group Tax ID number and all match Truli for Health provider files.



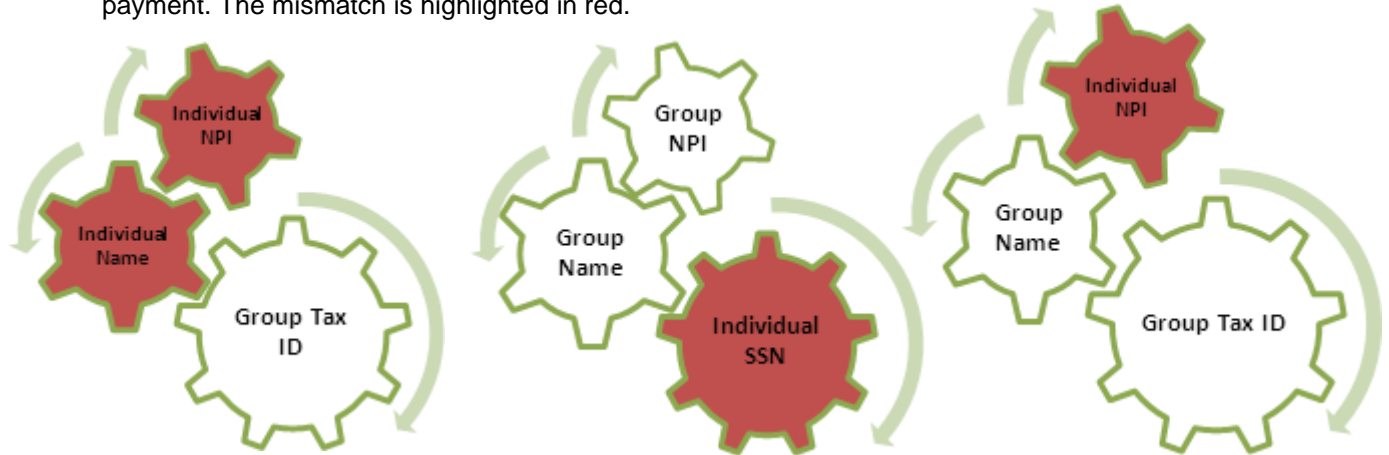
<sup>1</sup>Availity, LLC, is a multi-payer joint venture company. For more information or to register, visit [availity.com](http://availity.com).

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**Incorrect Entries (THE MISMATCH):**

Below are examples of information that will result in a mismatch of data causing a WEBV040 provider correctable error ultimately resulting in a delay in payment. The mismatch is highlighted in red.



**Remember: Group Name = Group NPI = Group Tax ID Number**

To confirm how you are registered with Truli for Health, please call the Provider Contact Center at 800-727-2227, select option 5, and then option 2. If you would like to register a different Tax ID number, please complete the Provider Information Update Form available on [Avality.com](http://Avality.com) (sections 1 and 6). A completed IRS confirmation letter must be included.

<sup>1</sup>Avality, LLC, is a multi-payer joint venture company. For more information or to register, visit [avality.com](http://avality.com).

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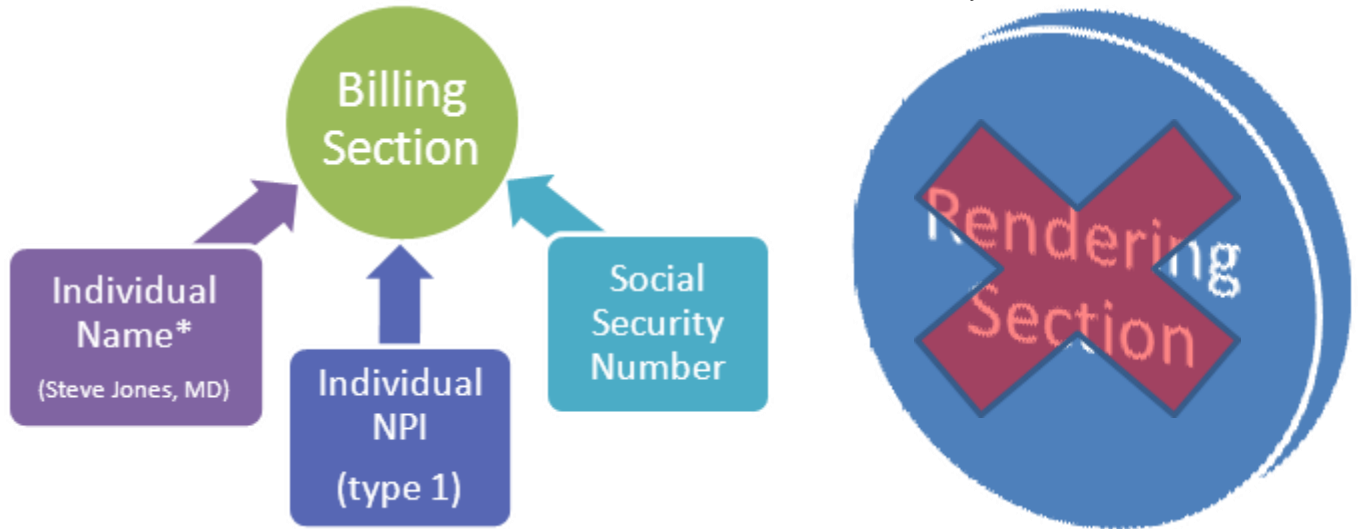
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**Billing as an Individual Provider – OPTION 2**

If you are billing as an individual provider, the NPI must be the individual NPI (type 1) along with the appropriate Social Security Number. Do not enter a provider at all in the rendering section when the billing and rendering provider is the same person. Submitting redundant information can cause a different provider correctable error.

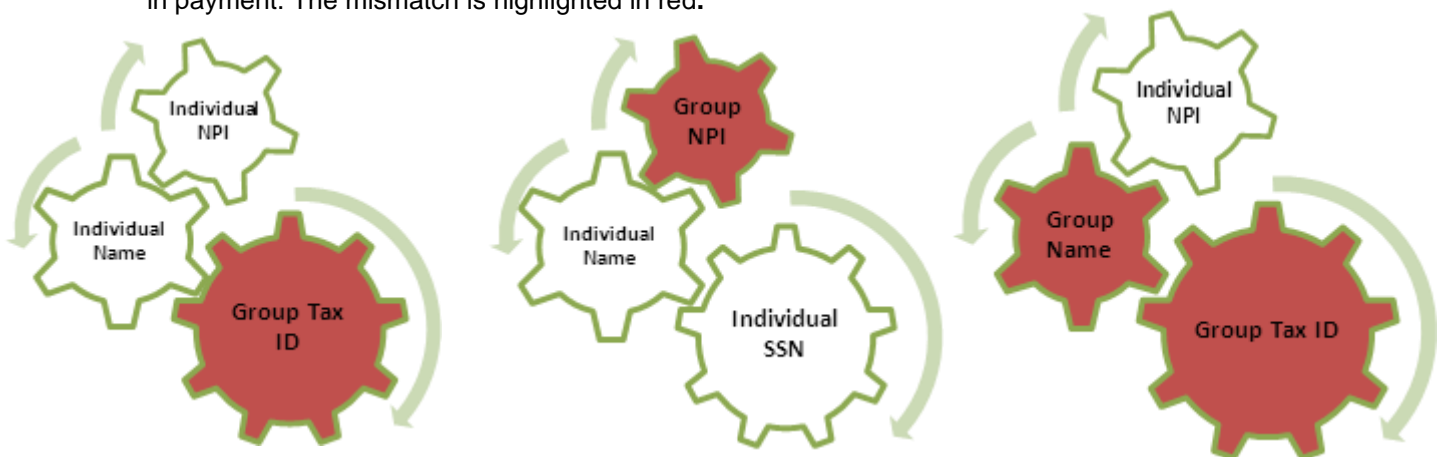
**Correct Entry (THE MATCH):**

This example shows how the information entered matches data registered with Truli for Health. Individual Name matches Individual NPI matches Individual Social Security Number.



**Incorrect Entries (THE MISMATCH):**

Below are examples of information entered that will result in a mismatch of data causing a delay in payment. The mismatch is highlighted in red.



**REMEMBER: Individual Name = Individual NPI = Individual Social Security Number**

To confirm how you are registered with Truli for Health, please call the Provider Contact Center at 800-

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# Truli for Health Plan Companion Guide ANSI 837I Health Care Claim Institutional Transaction Type

727-2227, select option five, and then option two. If you would like to register a different Tax ID number, please complete the Provider Information Update Form available on [Availity.com](http://Availity.com) (sections 1 and 6). A completed IRS confirmation letter must be included.

## Tips for Sending Coordination of Benefits Information on Electronic Claims

### 837 Institutional Health Care Claims

When Truli for Health is the secondary carrier, file the claim to Truli for Health on the member's behalf only **after the primary insurance has completed processing**. When Truli for Health shows another health plan is primary and there is no primary carrier payment or denial information, the claim will be returned for correction. EXCEPTIONS: Claims submitted with a GY modifier where Medicare would normally be primary, claims from VA/DOD facilities, Medicare Crossover claims.

When Truli for Health files show another health plan is primary, that information is provided on the 837 I Health Care Claim Institutional response. When the primary plan is NOT Truli for Health, the following loops and segments will be required:

**NOTE:** When the charges, payment amount, deductible, coinsurance, co-pay or adjustment is zero, the AMT or CAS segment must still be submitted. Indicate the zero amounts as 0.

R =Required S=Situational	837 Fields	Business Requirement
S	<b>2000B SBR01</b>	Value cannot = P (Primary Payer)
R	<b>Total Claim Charge Amount</b>	Loop 2300 CLM02 - Must balance to the sum of all service line charge amounts reported in Loop 2400 SV203.
R	<b>Claim Payment Amount</b>	When Truli for Health is secondary, submit the primary insurer payment information to support correct processing of COB information.  2320 AMT01 = D; REQUIRED 2320 AMT02 – Sum of all Line level Payment Amount minus any Claim Level Adjustment amounts must balance to Claim level Payment Amount.
R	<b>Patient Responsibility</b>	Loop 2300 HI01-1 = BE, HI01-2 = Value Code (A1- Deductible, A2 – Coinsurance and A7 – Copay) and HI01-5 = Amount*Note: The first value code will be reported as HI01; the second will be HI02 and will continue up to 12 value codes.
R	<b>Health Care Service Location Information</b>	When the institutional claim is for inpatient services (loop 2300, CLM05-1=11), the number of covered days is required and is calculated starting from the admit date to the day before discharge. In Loop 2300 use the following HI segment configuration: HI01-1 = BE, HI01-2 = 80, HI01-5= number of days.
S	<b>Inpatient Adjudication Information</b>	Required when Inpatient adjudication Information is reported in the remittance advice or used to report Medicare Remittance Remarks Codes. Refer to TR3, pages 391-397 for details.

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Truli for Health Plan Companion Guide ANSI 837I Health Care Claim Institutional Transaction Type

R =Required S=Situational	837 Fields	Business Requirement
S	<b>Outpatient Adjudication Information</b>	Required when Outpatient adjudication Information is reported in the remittance advice. Or Used to submit Medicare Remittance Remarks Codes. Refer to TR3, pages 398-401 for details.
S	<b>Payer Claim Control Number</b>	Loop 2330B, REF01 = F8, REF02 = Payer's Internal Claim Control Number or Original Reference Number

If billing a claim containing a trauma diagnosis, you will need to bill one or more occurrence, condition or value codes from the following code sets:

R =Required S=Situational	837 Fields	Business Requirement			
S	2300	<b>Occurrence Codes:</b>			
		<b>Code</b>	<b>Meaning</b>	<b>Qualifier</b>	<b>Segment</b>
		01	Accident/Medical Coverage	BH	HI01- 2, HI02-2, HI03 – 2, HI04 – 2, HI05 – 2, HI06 – 2, HI07 – 2, HI08 – 2, HI09 – 2, HI10 – 2, HI11 – 2, HI12 - 2  Recommend use of E or Y codes when OCC = 05
		02	Accident No Fault		
		03	Accident Tort		
		04	Accident Work Related		
		05	Accident No Medical or Liability Coverage – Other Accident		
		06	Crime Victim		
S	2300	<b>Code</b>	<b>Meaning</b>	<b>Qualifier</b>	<b>Segment</b>
		01	Military Service	BG	HI01 – 2, HI02 – 2, HI03 – 2, HI04 – 2, HI05 – 2, HI06 – 2, HI07 – 2, HI08 – 2, HI09 – 2, HI10 – 2, HI11 – 2, HI12 - 2
		02	Employment Related		
		03	Other Insurance Not Reflected Here		

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Truli for Health Plan Companion Guide ANSI 837I Health Care Claim Institutional Transaction Type

R =Required S=Situational	837 Fields	Business Requirement			
		Code	Meaning	Qualifier	Segment
S	2300	14	No Fault	BE	HI01 – 2, HI02 – 2, HI03 – 2, HI04 – 2, HI05 – 2, HI06 – 2, HI07 – 2, HI08 – 2, HI09 – 2, HI10 – 2, HI11 – 2, HI12 - 2
		15	Employment Related		

## 8 ACKNOWLEDGEMENTS AND/OR REPORTS

The purpose of this section is to outline the Truli for Health processes for handling the initial processing of incoming files and electronic acknowledgment generation.

### TA1 Interchange Acknowledgement Transaction

All X12 file submissions are pre-screened upon receipt to determine if the interchange control header (ISA) or interchange control trailer (IEA) segments are readable. If errors are found, a TA1 response transaction will be sent to notify the trading partner that the file could not be processed provided the file contains a code value of 1 in the ISA14. No TA1 response transaction will be sent for error-free files.

Once Truli for Health determines that the file is readable, validation is performed on the ISA and IEA loop information. If these segments have a non-standard structure, the file will receive a full file reject and the TA1 response transaction will be sent to the trading partner, provided the file contains a code value of 1 in the ISA14. Once Truli for Health determines that the file is readable, validation is performed on the ISA and IEA loop information. If these segments have a non-standard structure, the file will receive a full file reject and the TA1 response transaction will be sent to the trading partner, provided the file contains a code value of 1 in the ISA14.

### 999 Functional Acknowledgement Transactions

If the file submission passes the ISA/IEA pre-screening above, it is then checked for ASC X12 syntax and HIPAA compliance errors. When the compliance check is complete, a 999 will be sent to the trading partner informing them if the file has been accepted or rejected. If multiple transaction sets (ST-SE) are sent within a functional group (GS-GE), the entire functional group (GS-GE) will be rejected when an ASC X12 or HIPAA compliance error is found.

## 9 TRADING PARTNER AGREEMENTS

Please contact Availity for your trading partner agreement at 800-282-4548 or [Availity.com](http://Availity.com).

## 10 TRANSACTION SPECIFIC INFORMATION

IMPORTANT NOTE: If you submit your transactions through Availity, please refer to the Availity EDI Guide located on the Availity website at [Availity.com](http://Availity.com).

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## Truli for Health Plan Companion Guide ANSI 837I Health Care Claim Institutional Transaction Type

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### 10.1 ASC X12 Transactions Supported

Truli for Health processes the following ASCX12 HIPAA transactions for Institutional Claim Submission

<b>ASC X12 837 005010X222A1</b>	Institutional Claim Submission
<b>ASC X12 TA1 v005010X231A1</b>	Response to the X12 transactions where errors are encountered in the outer envelopes (ISA/IEA and GS/GE segments)
<b>ASC X12 999 v005010X231A1</b>	Functional Acknowledgement - Response to the X12 transactions where structural and syntactical errors are encountered within the transaction segments itself (ST-SE segments)

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