

Welcome to this interactive training on **UTRANSEND**

The buttons in this document are interactive. Click **Start** to begin, or click on a topic to jump to that section.



1. Purpose

2. Log In

3. Workflow

4. Using Filters

5. Claims & Reports

6. Bad Documents

Instructions

1 *Click on a section to learn more*

Instructions

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1. The section you are currently viewing will be highlighted on the left.
2. Click on a section name to jump to that part of the training.
3. You can always return to the main menu with the “Back to Main Menu” link at the bottom.
4. To follow the training in order, click “Continue to Next Section” when you are done with each page.
5. We strongly recommend logging in to the UTRANSEND portal and trying the steps from the training as you go.

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Purpose



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The UTRANSEND Web Portal is a reporting tool that allows you to view claims, reports, and errors. Because it is a web-based tool, you can log in from any computer with internet access.

UHIN recommends checking UTRANSEND on a regular basis to ensure your transactions are flowing and to quickly find and fix any errors.

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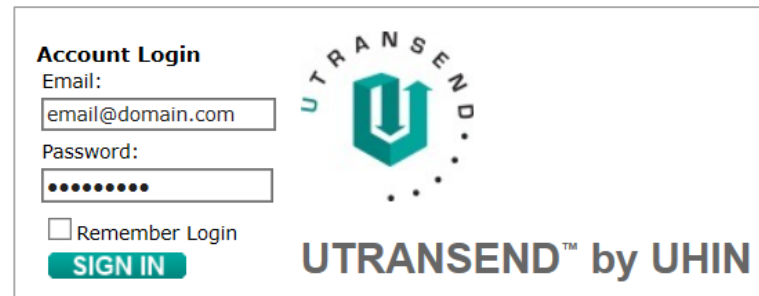
4. Using Filters

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To access the UTRANSEND web portal, click the following link: <https://www.utransend.net/>.

To log into the portal, enter your email and password into the appropriate text boxes.



The screenshot shows the UTRANSEND login interface. On the left, under the heading "Account Login", there are two input fields: "Email:" with the placeholder "email@domain.com" and "Password:" with masked characters. Below these is a checkbox for "Remember Login" and a green "SIGN IN" button. On the right, the UTRANSEND logo is displayed, featuring a stylized 'U' with an upward arrow inside a shield, surrounded by the word "UTRANSEND" in a circular arrangement. Below the logo, the text "UTRANSEND™ by UHIN" is visible.

If you do not know your username and/or password, contact UHIN Customer Service at 877-693-3071 or customerservice@uhin.org.

Once you are logged in, click on **Transmissions**.

Workflow

Click on a section to learn more

Instructions

1. Purpose

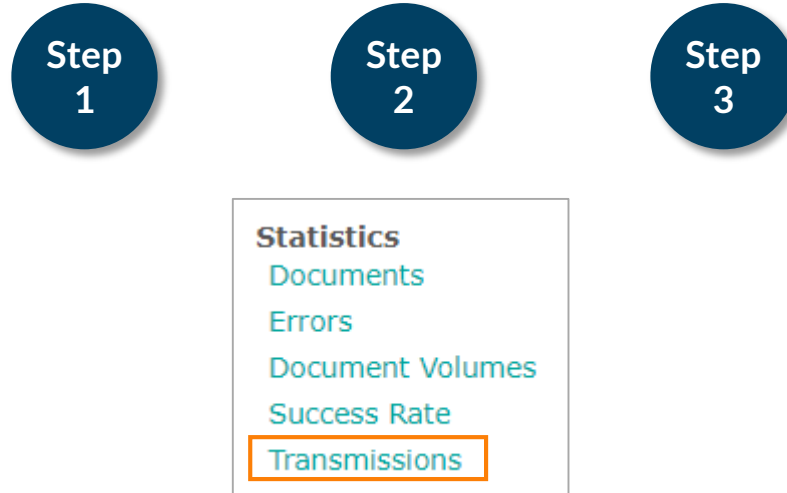
2. Log In

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UHIN recommends viewing the **Transmissions** page during each visit for an overview of the activity on your account. Claims and reports will display here; in addition, errors are highlighted in a “Bad Docs” column for easy identification.

There are 3 steps in UHIN’s recommended workflow. Click on each step to find out more.

Workflow – Step 1

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Overview:

Set your **Start Date and End Date** for the entire date range you wish to see. This range can be as large or small as needed. Once you have set your dates, click **“Show Summary”**.

The screenshot shows a search interface with the following elements: 'Start Date:' with a text input containing '12/1/2018', 'End Date:' with a text input containing '12/31/2018', and four dropdown menus: 'All Directions', 'All Data', 'All Versions', and 'All Transaction Types'. To the right is a 'Choose Fields' link and a 'Show Summary' button. The 'Start Date' and 'End Date' inputs, and the 'Show Summary' button, are highlighted with orange boxes.

In the results grid, focus on the **Good Docs**, **Bad Docs**, and **All Docs** columns for an overview of how much activity on your account is good (accepted) and how much is bad (rejected).

# Good Docs	# Bad Docs	# All Docs
7	0	7
25	0	25
14	1	15
57	3	60
163	2	165

Workflow – Step 2

Click on a section to learn more

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Bad Documents:

If you have any bad documents, work through and resolve those before completing other tasks. For detailed instructions on working with bad documents, [see section 6](#).

# Good Docs	# Bad Docs	# All Docs
7	0	7
25	0	25
14	1	15
57	3	60
163	2	165
1	0	1

Workflow – Step 3

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Filter:

After resolving any bad documents, you can now use the filters to look for specific information as needed. For example, you may want to see how many acceptances have been sent by payers.

For detailed instructions on using the filters, [see section 4](#).

Start Date:	End Date:	All Directions ▼	All Data ▼	All Versions ▼	277CA ▼	Choose Fields	Show Summary	Clear Filters
12/1/2018	12/31/2018							

Using Filters

Click on a section to learn more

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In the Transmissions page, filters across the top can help you find specific information.

Once you are ready to apply any changes, click the “Show Summary” button.

Start Date: 12/1/2018 End Date: 12/31/2018 All Directions All Data All Versions All Transaction Types Choose Fields **Show Summary**

Dates

All Data

All Versions

All Transaction Types

Using Filters – Dates


Click on a section to learn more

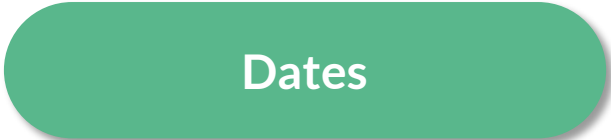
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Start Date: 12/1/2018 End Date: 12/31/2018 All Directions All Data All Versions All Transaction Types Choose Fields Show Summary

Use the date filter to view claims and reports for a specific time period.

Use the calendar icon  to select a date from a calendar view.



Using Filters – All Data

Click on a section to learn more

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Start Date: 12/1/2018 End Date: 12/31/2018 All Directions ▾ All Data ▾ All Versions ▾ All Transaction Types ▾ Choose Fields [Show Summary](#)

Note: The 'All Data' dropdown menu is highlighted with an orange box, and its options 'Bad Data' and 'All Data' are visible.

This filter allows you to view **all data** or just **bad data** (rejections).

Bad Docs
0
0
1
3
2
0



Bad Docs
1
3
2

Dates

All Versions

All Data

All Transaction Types

Using Filters – All Versions



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Start Date: 12/1/2018 End Date: 12/31/2018 All Directions All Data All Versions All Transaction Types Choose Fields Show Summary

All Versions
4010A
5010

UHIN converts the version for claims created in the UHINt 2.5 software. This filter will show claims in the version created by the UHINt software (version 4010), in the converted version sent to the payer (version 5010), or both together (All Versions). If you create claims in any other software, this filter does not apply to you.

NOTE: When “All Versions” is selected, UHINt 2.5 users will see each claim in two versions. To see the true number of claims submitted, select either the 4010 or 5010 version from the menu.

Dates

All Data

All Versions

All Transaction Types

Using Filters – All Transaction Types

Click on a section to learn more

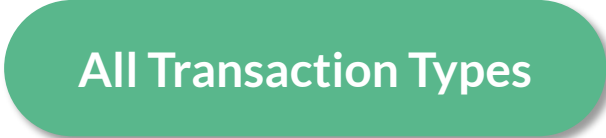
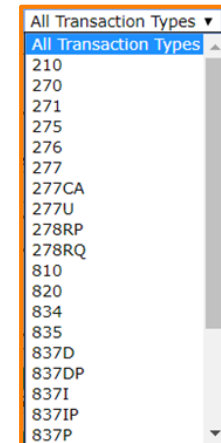
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Start Date: 12/1/2018 End Date: 12/31/2018 All Directions All Data All Versions All Transaction Types Choose Fields Show Summary

The “All Transaction Types” filter allows you to view transactions by type. Each transaction type has a different meaning. For example, **837D** is a Dental Claim, **837I** is an Institutional Claim, and **837P** is a Professional Claim.

[Click to view an overview of the most common codes.](#)



Claims & Reports



Click on a section to learn more

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To view a claim or a report in detail, begin on the **Transmissions** page and set an appropriate date range.

Click on each of the four steps above to explore the next steps.

(For more about date ranges, **see section 4.**)

Claims & Reports – Step 1

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Select a day

To view a claim or report, click on a date in the **Date** column.

Date
12/28/2018
12/27/2018
12/26/2018

Claims and reports will be filed under the date when they were sent into UHIN's system.

Once a date is selected, the screen will expand to show each file sent or received on that date.

Claims & Reports – Step 2

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Select a transaction

Locate a claim or report you wish to view. Remember, you can narrow your results by using filters. (For instructions on using filters, **see section 4**).

Stamp	Direction	FileName	File Size	ISA Count	Total Docs	Good Docs	Rejected Docs
 12/31/2018 2:01:35 PM	Inbound	HT000346-075_20181231140111_HT000198-010_000af9cc.837	1213	1	1	1	0

Once you have chosen a file to view, click the plus sign next to the file. It will expand to show some of the file details.

Claims & Reports – Step 3

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File Details

Once the file details have been expanded, review the **Amount**, **Receiver**, and **Submitter** identifier to ensure you are opening the correct file.

ISA #	# of Segments	# of GS's	ISA Sender	ISA Receiver	All Docs	Rejected Docs	Amount	Bad Amt		
15558888	36	1	HT000198-010	HT000346-075	1	0	\$6,015.55	\$0.00		
GS #	# of Segments	# of ST's	Transact.Set	GS Sender	GS Receiver	All Docs	Rejected Docs	Amount	Bad Amt	
15558888	36	1	005010X223A2	HT000198-010	HT000346-075	1	0	\$6,015.55	\$0.00	
ST #	# of Segments	All Docs	Rejected Docs	Amount	Bad Amt	Guideline				
777766	36	1	0	\$6,015.55	\$0.00	PDSA5010837I+TI_FILTER				
DOC #	Amount	Assigned	Document Date	Number of Errors	Original File Date	Original File Name	Receiver	Sender	Status	Submitter Identifier
1	6,015.55		5/16/2018 12:16:00 PM	0			HT000346-075	UHN TESTING		123ABC

To proceed with opening the file, find the **Doc #** on the left and click on the number below.

Claims & Reports – Step 4



Click on a section to learn more

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Document Summary

You are now on the Document Summary page with basic details about the claim or report you selected.

If the claim or report was rejected as a bad document, you will find the rejection reason information on this page. For detailed instructions on working with bad documents, [see section 6](#).

Document Summary for: 123ABC

Transmission Name: HT000346-075_20181231140111_HT000198-010_000af9cc.837
Transmission Date: 12/31/2018 2:01 PM
Version: 5010
Transaction Set: 837I
Document Date: 5/16/2018 12:16 PM
Sender: UHN TESTING
Receiver: HT000346-075
Dollar Amount: \$6,015.55

InStream

APF File: UHN_CustomError.apf
Error File: CustomerFSBRERRS.TXT
Error File: FSNERRS.TXT
Error File: FSBRRERS.TXT
Guideline: UHN_5010277CA

Message

EDI Non-Technical Institutional Professional Dental

- Document Errors: -- 2

Error	Severity	Type	Description
32900	Error - 3	8	A3 Acknowledgement/Returned as unprocessable claim-The claim/encounter has been rejected and has not been entered into the adjudication system.
32088	Error - 3	8	88 Entity not eligible for benefits for submitted dates of service. Note: This code requires use of an Entity Code.

[Click here to View the document](#)

Claims & Reports – Step 5

Click on a section to learn more

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View the document

For claims (837s) and payment information (835s), select **Click here to View the document** to see a human-readable copy.

The screenshot shows a standard 837 claim form with various fields for patient information, provider details, and charges. The form is titled 'UB-04 - 0 Error(s) Errors Not In Form - 0 Error(s) Raw Edit'.

Document Summary for: 123ABC

Transmission Name: HT000346-075_20181231140111_HT000198-010_000af9cc.837
Transmission Date: 12/31/2018 2:01 PM
Version: 5010
Transaction Set: 837I
Document Date: 5/16/2018 12:16 PM
Sender: UHN TESTING
Receiver: HT000346-075
Dollar Amount: \$6,015.55

InStream

APF File: UHN_Validation.apf
Error File: CustomerFSBRERRS.TXT
Error File: FSNERRS.TXT
Error File: FSBRRERS.TXT
Guideline: PDSA5010837I+TI_FILTER

[Click here to View the document](#)

[Click here to View the document](#)

Bad Documents

Click on a section to learn more

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Step
1

Step
2

Step
3

Bad Documents represent files that have been rejected from processing. These files must be resubmitted with the correct information to begin processing again.

Click on each step above to learn how to resolve bad documents.

Note: Claims resulting in a reduced or \$0.00 payment will *not* be marked as bad documents. These non-payments are typically due to plan types (e.g. high deductible plans) or coverage exclusions rather than billing errors. Details on non-payments will be provided in the payer's remittance advice.

Bad Documents – Step 1

Click on a section to learn more

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Identify

- Find the Day
- Find the File
- Find the Reason
- Helpful Tip

First, you must identify the bad document. Begin on the **Transmissions** page, making sure to set an appropriate date range.

Click through each of the tiles above (“Find the Day,” “Find the File,” etc.) to walk through the process.

Bad Documents – Step 1

Click on a section to learn more

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Identify

[Find the Day](#)

[Find the File](#)

[Find the Reason](#)

[Helpful Tip](#)

The results grid in UTRANSEND will identify bad documents and organize them by day. Identify any days with bad documents.

Date	# Bytes	# Transmissions	# ISA	# GS	# ST	# Good Docs	# Bad Docs	# All Docs
12/31/2018	98768	44	44	44	60	126	1	127
12/29/2018	22925	12	12	12	21	25	0	25
12/28/2018	16759	5	5	5	15	14	1	15
12/27/2018	43504	18	18	18	45	57	3	60
12/26/2018	124232	38	38	38	45	163	2	165
12/25/2018	1098	1	1	1	1	1	0	1

[Download To Excel](#)

Page 1

Bad Documents – Step 1

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Identify

- Find the Day
- Find the File
- Find the Reason
- Helpful Tip

Click on a date containing a bad document...

Date	# Bytes	# Transmissions	# ISA	# GS	# ST	# Good Docs	# Bad Docs	# All Docs
12/31/2018	98768	44	44	44	60	126	1	127
12/29/2018	22925	12	12	12	21	25	0	25

...then use the to expand the line with a rejection.

Stamp	Direction	FileName	File Size	ISA Count	Total Docs	Good Docs	Rejected Docs
12/31/2018 2:01:35 PM	Inbound	HT000346-075_20181231140111_HT000198- 1213 010_000af9cc.837		1	4	3	1
12/31/2018 9:33:30 PM	Outbound	HT000198-010_20181231213322_HT000001- 967 100_293248bf.277		1	2	2	0
12/31/2018 8:30:56 PM	Outbound	HT000198-010_20181231203049_HT000001- 301 100_c07d288f.999		1	1	1	0
12/31/2018 8:30:55 PM	Outbound	HT000198-010_20181231203049_HT000001- 301 100_ef355424.999		1	1	1	0

Bad Documents – Step 1



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Identify

Find the Day

Find the File

Find the Reason

Helpful Tip

Click on the **Doc #** for the rejected file; this will load the Document Summary page with the error description(s).

ISA #	# of Segments	# of GS's	ISA Sender	ISA Receiver	All Docs	Rejected Docs	Amount	Bad Amt		
155558888	36	1	HT000198-010	HT000346-075	1	0	\$6,015.55	\$0.00		
GS #	# of Segments	# of ST's	Transact.Set	GS Sender	GS Receiver	All Docs	Rejected Docs	Amount	Bad Amt	
155558888	36	1	005010X223A2	HT000198-010	HT000346-075	1	0	\$6,015.55	\$0.00	
ST #	# of Segments	All Docs	Rejected Docs	Amount	Bad Amt	Guideline				
777766	36	1	0	\$6,015.55	\$0.00	PDSA5010837I+TI_FILTER				
DOC #	Amount	Assigned	Document Date	Number of Errors	Original File Date	Original File Name	Receiver	Sender	Status	Submitter Identifier
1	245.00		12/27/2018 12:00:00 AM	0			HT000346-075	UHN TESTING	123ABC	
2	280.00		11/14/2018 12:00:00 AM	2			HT000346-075	UHN TESTING	123ABC	
3	245.00		10/30/2018 12:00:00 AM	0			HT000346-075	UHN TESTING	123ABC	
4	245.00		12/28/2018 12:00:00 AM	0			HT000346-075	UHN TESTING	123ABC	

Bad Documents – Step 1

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Identify

- Find the Day
- Find the File
- Find the Reason
- Helpful Tip

If you have trouble locating the bad document, try using a filter. Change **All Data** to **Bad Data**, then click **Show Summary**. This will ensure your display only includes bad documents.

Start Date: 12/1/2018 End Date: 12/31/2018 All Directions ▾ **Bad Data** ▾ All Versions ▾ All Transaction Types ▾ Choose Fields **Show Summary**

Click “Continue to Next Section” or go to **Step 2** above.

Bad Documents – Step 2

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Review

On the Document Summary page, examine the error reason(s). You may find that multiple messages have been grouped together and give different amounts of detail for the same error.

Error	Severity	Type	Description
32900	Error - 3	8	A3 Acknowledgement/Returned as unprocessable claim-The claim/encounter has been rejected and has not been entered into the adjudication system.
32088	Error - 3	8	88 Entity not eligible for benefits for submitted dates of service. Note: This code requires use of an Entity Code.

TIP: Look for key words in the descriptions. If the error identifies a field or type of information, check to see if that field or information was missing or incorrect.

In the example above, “not eligible for benefits” may indicate a problem with the patient/subscriber details or coverage.

Bad Documents – Step 3



Click on a section to learn more

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Re-send

Once you have identified the error, you can send a new copy of the claim with the corrected information. You do not need to specifically mark the claim as a correction.

If you have any questions about bad documents, contact UHIN Customer Service (877-693-3071 or customerservice@uhin.org).

You're Done!

Thank you for taking this interactive training

 Questions? Email education@uhin.org