

# SMART DATA STREAM COMPANION GUIDE

PORTAL.SMARTDATASTREAM.US

SDS Provider Support

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855-297-4436



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## ERA ENROLLMENT

 There are several different methods for starting an ERA account with Smart Data Solutions depending on which payer you're enrolling for. If you have an account that doesn't include ERA enrollment already, or if you have a specific ERA account and would like access to additional payer's ERAs, please contact us as <u>stream.support@sdata.us</u> or 855-297-4436 opt. 2 for more information.

### STARTING ERA ENROLLMENT

• After you've logged in and changed your password, you should be immediately prompted to start your ERA enrollment.



• If the above screen does not automatically appear you can select Account Management at the top bar. Then select Provider Profiles

	Users
SMARTDATASTREAM Clearinghouse Portal	Reset Password
Home Remits Account Management Help	My SDS Plan
	My Providers
	Provider Profiles
	Admin Change Request



### OR

• Select Remits at the top bar then Manage Enrollments

SMARTDATASTRE Clearinghouse	AM Portal		
Home	Remits	Account Management	Help

Manage Enrollments

### ENROLLMENT FORM

Profile		Profile Name will not affect your ERAs and is only for labeling enrollments on your account
Profile Nickname		
Provider Information		
* Name		
Test Provider T1000		
Doing Business As (DBA)		
* Address Line 1		Don't forget to verify your tax ID
Address Line 2		
Provider Identifiers Information	I	NPI is not required for your ERA
	×	enrollment. If left blank, you will
* Tax Identification Number (TIN) ⊕	* Verify TIN:	 receive FRAs for all NPIs associated
National Provider Identifier (NPI)	Verify NPL	 with the Tax ID you enroll
Trading Partner ID ©		,
Provider Contact Information		
* Last Name	* First Name	Trading Partner ID is not required it
test	test	you do not have one
* Contact Phone		
(651) 555-5555 x55555	-	
Contact Fax		Fax may be left blank it unavailable



• Under Payer Selection select "or select individual payers" You will then see the screen below:

Click on the following alpha	bets to search by payer name.			
AII A B C D I	F G H I J K L M N O P Q R S T U V W >			
Show 10 v entries	Search:			
Select Payer	Li Payer Name Li	Payer ID		
3				
	3P ADMIN	20413		
A				
	All Payers	ALL		
	TIVA BENEFIT SERVICES LLC 38254			
	Iministrative Concepts, Inc 22384			
0	merican Family Insurance 56071			
	AMERICAN REPUBLIC INSURANCE COMPANY 42011			
0	AMPS	AMPS 21825		
0	AMPS - CX	25667		
	AMPS America	66775		
	ARISE HEALTH PLAN	ARISE		
Showing 1 to 10 of 41 entr	s Previous 1 2	3 4 5 Nex		

### • Select Clearinghouse

## Payer Selection

...or select individual payers

Payer Name	Payer ID
ACTIVA BENEFIT SERVICES LLC	38254
Administrative Concepts, Inc	22384
American Family Insurance	56071
AMERICAN REPUBLIC INSURANCE COMPANY	42011
AMPS	21825

Clearinghouse Name		Actions	
Ability	•	Apply All	$\times$
SDS Enrollment Portal	•	Apply All	×
SDS Enrollment Portal	•	Apply All	×
SDS Enrollment Portal	•	Apply All	$\times$
SDS Enrollment Portal	•	Apply All	×



• Select "Apply All" to the right of the Clearinghouse Name and you will see the following result

Payer Selection				
Payer Name	Payer ID	Clearinghouse Name	Actions	
ACTIVA BENEFIT SERVICES LLC	38254	Ability	Apply All	×
Administrative Concepts, Inc	22384	Ability	Apply All	×
American Family Insurance	56071	Ability	Apply All	×
AMERICAN REPUBLIC INSURANCE COMPANY	42011	Ability	Apply All	×
AMPS	21825	Ability	Apply All	×

- The form will automatically have New Enrollment selected. If you click Save Progress and then come back to it, it will say Change Enrollment.
  - This does not affect your enrollment and only indicates that this is no longer the first time you are accessing this form.
- Type in your name for the signature.
- For the effective date, the soonest date available will be three days after the submission date. Any payments you receive after that submission date will have a corresponding ERA sent to your account.

Submission Information Reason for SUBMISSION © New Enrollment Change Enrollment		
Cancel Enrollment		
Authorized Signature		
* Signature O	Submission Date	
	2019-08-27	
* Deguasted EDA Effective Date O		
Requested Envienceine Date o		
SAVE PROGRESS		



SUBMIT



• After you click Submit it will redirect you to a page that looks like this. If you see this page, you have successfully submitted your ERA enrollment.

# Account Management

This page is for maintaining account wide preferences such as viewing or re-issuing your API key, or managing payment methods.

Users	Trovider Fronies	
Reset Password		
Provider Profiles	Test 11111111	Edit/Review
Admin Change Request	Current Status: Complete	
	Show Details	Delete Provider Profile
	Add New Provider Profile	



 To change contact information, add or remove payers, change retrieval method, or cancel your enrollment you can click on Edit/Review • To enroll additional tax ID's or NPI's click Add New Provider Profile



# ELIGIBILITY INQUIRY

• Select the Eligibility Tab on the top bar of the page

SMARTDATASTREAM Clearinghouse Portal		
Home Claims Remits Eligibility Cla	aim Status Account Management Help	Logout
Eligibility This page allows you to view your past 90 days of elig button(s) below. This page is also searchable by a number of criteria. Y current batch. To search for a document, enter the se	ibility inquiries. You can key new eligibility inquiries, an You may enter a reference number or an export name t earch criteria into the 'Search' box to the left of the tabl	d view eligibility inquiry files using the to search for documents within the e.
New Eligibility Inquiry	Eligibility Inquiry Files	Update Payers

• Select New Eligibility Inquiry

New Eligibility Inquiry						
Mode:      Real Time						
Destination:	American Republic/Amer	ican Family/Medico/Conti	nental General/Central Reserve Life	270/271 🔻		
Subscribe	er Information					
Patient Name * (L Last	ast Name, First Name, Middle I First	nitial) Middle	Member Date of Birth *	¥	Member ID *	Insured? Yes ▼
Address (No. Stre Address Line 1 Address Line 2	eet)		City City	State State	Zip Zip Code	
Inquiry/Service T Health Benefit	ype: Plan Coverage	▼				
		🖶 Add Inquiry				Add Member
	Save Progress		Save Inquiry		Submit Real-Time Requ	lest

• Fill out the starred boxes on the form and click Submit Request



• Results will vary, but will standardly appear in this format:







# CLAIM STATUS

• Select the Claim Status tab on the top bar of the page

	AM Portal							
Home	Claims	Remits	Eligibility	Claim Status	Account Management	Help	Logout	
Claim This page allows you using the button(s) b This page is also sea current batch. To sea	St to view y below. rchable b arch for a	our past y a numb documer	JS 90 days of per of criter nt, enter th	claim status i ria. You may e ee search crite	nquiries. You can ke nter a reference nur ria into the 'Search'	y new cla nber or a box to th	claim status inquiries, and view claim status inquiry files r an export name to search for documents within the the left of the table.	
	N	ew Claim S	tatus Inquir	у			Claim Status Inquiry Files	

• Fill out the starred boxes on the form and click Submit Request

New Claim	Status Inquiry								
Mode: Destination:	Mode:     Real Time       Destination:     American Republic/American Family/Medico/Continental General/Central Reserve Life 276/277 •								
Provider ID *									
Subscriber Nam Last	e <sup>*</sup> (Last Name, First Name, Middle Initial)  First	Middle		Subscriber Date of Birth *	Subcriber ID *				
Patient Name (Li Last	ast Name, First Name, Middle Initial) First	Middle		Patient Date of Birth	Claim Date of Service				
Procedure Code		Se Y	ervice Date From	Service Date To	Service Charge				
				Submit Request					



• Results will vary, but will standardly appear in this format:

laim Status Inquiry Results	
ource Name:	SMART DATA SOLUTIONS
lember ID:	000007600314
Subscriber Name:	GLEASON, JOYCE
Status Information	
Control Number	102617718885
Dates of Service	10/13/2017 - 10/13/2017
Claim Charges	\$ 34.00
Claim Paid Amount	\$ 0.00
Adjudication Date	10/26/2017
The transaction processing has been completed	Cannot provide further status electronically



## SUBMITTING A CLAIM

• There are two options to submit a claim through the Smart Data Stream Clearinghouse Portal. You can either upload a claim file or you can do Direct Data Entry and key in a new claim.

SMARTDATASTRE Clearinghouse	AM Portal						
Home	Claims	Remits Eligibility	Claim Status	Account Management	Help		Logout
Claim. This page allows you unsubmitted claims,	S 1 to manage and view cl	your past 90 day aim files using the	s of claims. Yc	ou can edit rejected c low.	laims, upload a new	claim file, key a new claim, vi	ew
This page is also sea current batch. To se	rchable by a arch for a do	a number of criter ocument, enter th	ria. You may e ne search crite	nter a reference nun ria into the 'Search' b	nber or an export na box to the left of the	me to search for documents table.	within the
Manage Rejects		Upload Claims	N	ew Claim	Unsubmitted Claims	Claim Files	Update Payers

### UPLOAD CLAIMS

• If you selected "Upload Claims", this screen will appear:

Claim Upload
Use this interface to upload claims in EDI format. Once the claims have been uploaded and checked for basic compliance, they will appear below. Please review and add any additional attachments to the claims by clicking the upload button underneath the claim. Once this has been completed please click the release button and the claims will be routed to the payer along with the attachment.
Uploaded Documents
Please drop your file here or
Choose File No file chosen

• This feature allows you to upload claims in batches to portal. As long as it's a valid 837 file and has a payer ID in the REFO2 segment, SDS will successfully route your claims on to the payer.



#### NEW CLAIM

• If you selected "New Claim", this screen will appear. From here you can either choose a

Professional/CMS1500 claim form, an Institutional/UB04 claim form, or a Dental claim form.

New Document									
This data entry page will allow you to key an empty form for processing. To being entering information, please select a destination and a form to key. Once a form is selected you will be automatically redirected to the appropriate page to enter any data. Note that no data is saved until the submit button at the bottom of the page is selected. Once the entry has been completed, there may be a short delay before the entry appears on the history page while the system is processing it.									
Please select the appropriate route and form type to begin.									
Destination	Document Type								
Amerigroup 🔻	Select a Type Select a Type Professional Institutional Dental								

• Once the claim type has been selected, it will bring up a template for the claim information to be typed into. The various document types are shown below:



### PROFESSIONAL

More											
1. Type OTHER	V					[	la. INSURED'S I D. NUMBER				
2. PATIENT'S NAME (Last Name, Finate Street	rst Name, Middle I	3. PATIENT'S BIRTH DATE				4. INSURED'S NAME (Last Name, First Name, Middle Initial) Last First Middle					
5. PATIENT'S ADDRESS (No. Street)	6. PATIENT RELATIONSHIP TO INSURED				7. INSURED'S ADDRESS (No. Street)						
CITY STATE			8. RESERVED FOR NUCC USE				СІТҮ			STATE	
ZIP CODE TE	TELEPHONE						ZIP CODE			TELEPHONE	
9. OTHER INSURED's NAME (Last Initial)	Name, First Name,	Middle				[	11. INSURED'S POLICY GROUP OR FECA NUMBER				
a. OTHER INSURED's POLICY OR [More]	GROUP NUMBER	L.	10. IS PATIENT'S C Employment? No.		ION RELATED TO:	1	a. INSURED'S	BIRTH DAI Sex	E V		
b. RESERVED FOR NUCC USE			Auto Accident? <u>No</u> Other Accident? <u>No</u>	Ŧ	•	1	b. OTHER CL.	AIM ID (Des	ignated	d by NUCC)	
c. RESERVED FOR NUCC USE			_				c. INSURANCI	E PLAN NA	ME O	R PROGRAM NAME	
d. INSURANCE PLAN NAME OR P	ROGRAM NAME		10d. CLAIM CODE	S (Desi	gnated by NUCC)	(	d IS THERE A	NOTHER H	EALT	H BENEFIT PLAN?	
12. PATIENT'S OR AUTHORIZED P Signed	PERSON'S SIGNAT	TURE					13. INSURED'S OR AUTHORIZED PERSON'S SIGNATURE Signed				
14. DATE OF CURRENT ILLNESS, (LMP) YYYY/MM/DD QUAL	INJURY, PREGNA	INCY	15. OTHER DATE QUAL VYYY/MM/DD				16. DATES PATIENT UNABLE TO WORK IN CURRENT OCCUPATION				
17. NAME OF REFERRING PROVID	DER OR OTHER S	OURCE	7a.				18 HOSPITALIZATION DATES RELATED TO CURRENT SERVICES				
Last			110. 111			[	YYYY/MM/DD	TO YYYY/M	M/DD	]	
19. RESERVED FOR LOCAL USE						(	20. OUTSIDE I	LAB?	\$ C 0.0	HARGES	
21. DIAGNOSIS OR NATURE OF II A.	LLNESS OR INJU B.	RY	ICD Ind. ICD-10 V C. D.				22. RESUBMISSION CODE			RIGINAL REF. NO.	
E I	F J		G H K L				23. PRIOR AUTHORIZATION NUMBER				
24. A. DATES OF SERV	VICE B. PC	OS C. EMO	D. PROC M	ODIFIE	ER E DIAG	F. CHARC	HE G. D/U EI	H I QU	JAL J	PROVIDER ID	
Add Line											
25 FEDERAL TAX I.D. NUMBER			ENT'S ACCOUNT NO. 27. ACCEPT ASSIGNMENT?			<b>Τ</b> ?	28. TOTAL CHARGE 29. AMOUNT PAID 30. RSVD for NUCC \$ 0.00 \$ 0.00				
31. SIGNATURE OF PHYSCIAN OF	32. SERVIC	E FACILITY LOCATI	ION IN	FORMATION	1	33. BILLING PROVIDER INFORMATION					
Last Advance							Name Address				
First Middle Condential											
Innune  Lrebendal		City			V		City				
		Zup Phone		1			Zip Phone				
		a. NPI		b.			a. NPI			b.	
					[						
Save Progress							tion Submit Document				



#### INSTITUTIONAL

More					
Name	Nama		38		4 BILL TYPE
Addr	Addr		3b.		
CEy AA	City		5 FED TAX	ND. 8 STATE	MENT COVERS
Phone - Fax				YYYY/MM/DD	YYYYY/MM/DD
8 Palent Name a	9 Patient A	ddress a			
b,	b			c 🔽	d
10 BIRTHDATE 11 SEX ADMISSION	18 DHR 17 STAT		CONDITION CODES		29 ACDT STATE 30
12 DATE 13 HR	14 TYP 15 SRC	18 19 20 21	22 23 24	25 28 27	225
31 OCCURRENCE 32 OCCURRENCE	33 OCCURRENCE 84	OCCURRENCE 35	OCCURRENCE SPAN		COURRENCE SPAN 37
CODE DATE CODE DATE	CODE DATE CODE	DATE CODE	FROM THROU	GH CODE FRO	M THROUGH
		39	VALUE CODES	40 VALUE CODES	41 VALUE CODES
Name,					
Address					
City V					
Zp					
42 REV CD 43 DESCRIPTION	44 HOPOSIRATE	HIPPS CODE 45 SERV. DATE	46 SERV. UNITS	47 TOTAL CHARGES 48 NO	N-COVERED CHARGES 49
Add Line					
	CREATION DATE	1	TOTALS >	0.00	0.00
50 PAYER NAME	51 HEALTH PLAN ID	52 REL 53 ASG INFO BEN 54 PRIOR PAY	MENTS 55 EST AMT DUE	56 NPI	
Ameriqroup	81237	Y Y 0.00	0.00	57	
		0.00	0.00	ОТН	
		0.00	0.00	PRV ID	
58 INSURED's NAME	59 P.REL 60 INSURED's UNIQUE ID	_	61 GROUP NAME	62 INSU	RANCE GROUP NO
					More
					More
					More
63 THEATMENT AUTHORIZATION CODES	84 DOCUMENT CONTR	ÓL NUMBER	15 E	MPLOYER NAME	
88 DX 87				с н	65
				P 0	
		CODE 72 ECI			
74 PROC DATE # 62909	DATE 5 PROC	DATE 75	76 NO		
			ATTEND. MAT		
e PROC DATE d INOC	DATE ADROG	DATE	77.0PER. NO	0.04	
			1497		swer
			78 OTH		
			NPI	QUAL	
b			LAST		FIRST
			79 OTH NPI	QUAL	
			LAST		FIRST
Save Docume	int Progress			Submit Document	



DENTAL

Header information		1						
1. Type of Transaction	1000 C							
Statement of Actual Services								
2. Predetermination/Presuthorization Nume	ber .	Polloyholderi Sul	bsoriber Information	Ū.			Copy from Pallert	
		12. Policyholden Subscriber Name, Address, State, Zip						
Incurance company/pental Benefit Plan	Information	Name.						
Name: American Republic In	surance	Address.	-					
Address:		Address Line 2		-				
Address Line 2		City:		10 M (1)				
ON		Zipx [						
70		13. Date of Birth	-	14. Gender 15. Po	licyholder/S	ubscriber ID (S	SN or ID#)	
Other Coverage		16. Plan/Group N	umber	17. Employer Name				
4. Other Dental or Medical Coverage? No								
5. Name of Policyholder/Subscriber in #4		Patient Informat	lon			3	Jopy fram Subscriber	
6 Date of Birth		18. Relationship t	Policyholden/Subsc	rber 19.3	Student Stat			
D, LAINE OF BEES	7. Gender 8. Policyholden/Subscriber ID (SaN or IDF)	20 Name Addres	ss. City State, Zo	T.				
		Name		1.				
5. Piantaroup Number	10. Patient's Relationship	Address:						
11. Other Insurance Company/Dentri Bary	dis Plan	Address Line 2						
Name:		City:		Y				
Address		Zix		-36				
City:		21 Date of Birth			matical areas	Coloranae -		
Zio		21. Date of Brits	i i	Z. Genoor 23.1	Patient surv	CCOUNT #	0	
		1	l2					
Record of Services Provided	144411 144410 (Marcaldon 4441) (Contra	-		1074 / J. T. S.			102405-0041	
24. Proc Date	25. 26. 27. (odd) Number(s) 28. Area System or Later(s) Sur	loom 29,1 face	Procedure Code	30. Descri	ption		31. Fee	
Add Line								
Missing Teeth Information	Permanent			i		1		
	00000000000000	00	00000		32	. Other Fees		
34 (Bare an X an each missing both)	1 2 3 4 5 6 7 8 9 10 11 12 13 14	15 16	A B C D I	EFGHI.	8.		1	
and the service sectors of social		8.8			33	Total Eas	0 0	
	32 31 30 29 28 27 26 25 24 23 22 21 20 19	18 17	TSRD	PONMLR	<		hi di	
35. Remarks								
L								
Authorizations		Anoiliary Cialm/	Treatment Information	m				
36. I have been informed of the treatment ; for dental services and materials oct paid to	vian and associated fees. I agree to be responsible for all charges	38. Place of Treat	triant			39. Number of	Enclosures	
dentist or dental practice has a contractual	agreement with my plan prohibiting all or a portion of such charges.	<u></u>						
out payment activities in connection with th	is document.	40. Is Treatment t	for Orthodontics?			41. Date Appli	ance Placed	
x								
Patient/Guardian signature	Date	42. Months of Tra	atment Remaining	43. Replacement Pros	sthesis?	44. Date Prior	Placement	
<ol> <li>I hereby authorize direct payment of the named dentist or dential entity.</li> </ol>	e dental benefits otherwise payable to me, directly to the below	45. Treatment Re	sulting from	<u></u>				
Subscriber contours	Date	1			-			
CALIFORNIA SPECIFIC	L/Mile.	46. Date of Accid	tra			47. Auto Acod	ont State	
		L.						
Billing Dentict or Dental Entity	Crev from Treating	Treating Dentist	and Treatment Loos	tion Information			Copy from Billing	
48		53. I hereby certif multiple visits) or	y that the procedures have been completed	as indicated by date are	e in progress	s (for procedure	is that require	
None		x	1				10	
Audress.		Signed (Treating	Dentist)			Date	10 P.1	
Address Line-2		54. NPI			5	5. License Nur	ther	
1.0y.	<u>.</u>	12	1				2	
Z#		56.			5	6A. Provider Sp	ocialty Code	
49. NPI 50. L	cense Number 51. SSN or TIN	Address.	-	1			- 24 B	
		Address Line 2						
52, Phone Number	52A. Additional Provider ID	City:		<b>V</b>				
		Zip						
		57. Phone Number	87		5	8. Additional Pr	ovider ID	
		1991200900000000 19			Ē		AN CONTRACT OF	