

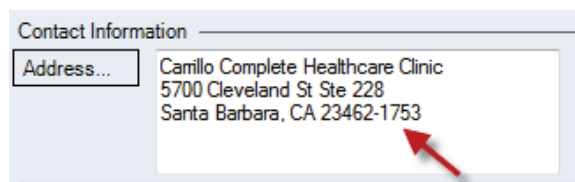
5010 Compliance Checklist for Kareo Users

Kareo is committed to being proactive to ensure that your practice is 5010 compliant prior to January 1, 2012. In preparation for the 5010 changes, we recommend updating, as soon as possible, the areas in Kareo noted below to avoid claim rejections and patient statement errors. Additionally, please review the 5010 enrollments updates provided in the section *Enrollments*.

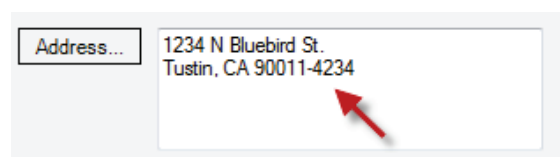
Claims Submission

Update zip codes to a 9 digit zip code and PO Boxes to a physical address

- ❑ Look up any 9 digit zip code at the US Postal Service website: <http://usps.com>
 - Under Quick Tools in the top left, click **Look up a Zip Code™**.
 - Enter an address, including the 5 digit zip code.
 - Click **Find** and the 9 digit zip code will be provided.
- ❑ Update Practice Information zip codes and PO Boxes:
 - Log in to Kareo and click **Settings > Practice Information** in the top menu.
 - In the *Contact Information* box, update the zip code to a 9 digit one.
 - If a PO Box was entered, update the address to a physical location.
 - Click **Save**.



- ❑ Update all Provider zip codes and PO Boxes:
 - Click **Settings > Providers** in the top menu.
 - In the *Find Provider* window, double-click on the first provider in the list. In the *Address* box, update the zip code to a 9 digit one.
 - If a PO Box was entered, update the address to a physical location.
 - Click **Save**.
 - Repeat for all providers in the list.



- ❑ Update all Service Location zip codes and PO Boxes for professional claims:
 - Click **Settings > Service Locations** in the top menu.
 - In the *Find Service Location* window, double-click on the first service location in the list. In the *Billing Name and Address* box , update the zip code to a 9 digit one.
 - If a PO Box was entered, update the address to a physical location.
 - Click **Save**.
 - Repeat for all service locations in the list.

- ❑ Update all Service Location zip codes for institutional claims:
 - Click **Settings > Service Locations** in the top menu.
 - In the *Find Service Location* window, double-click on a service location for institutional claims. In the *Address* box, update the zip code to a 9 digit one.
 - Click **Save**.
 - Repeat for all service locations for institutional claims in the list.

Enter a new Pay-To Address for payments that must go to a PO Box or Lockbox

The steps below must be completed for each provider on your Kareo account. Before proceeding, determine if the Pay-To Address is for all payers or only a specific payer. These updates are made in the *Override Claim Settings* window:

1. Click **Settings > Providers** in the top menu.
2. In the *Find Provider* window, double-click on the first provider in the list.
3. Click the *Claim Settings* tab.
4. Follow instructions for each scenario below.

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- ❑ To add a Pay-To Address for all payers:
 - On the *Claim Settings* tab, check the “Enable Pay-To Address” box.
 - Enter the name and address to where payments are to be sent.
 - Click **Save**.

 - ❑ To add a Pay-To Address for a specific payer only:
 - On the *Claims Settings* tab, click **Add** on the right. The *Override Claim Settings* window opens.
 - Click the **Insurance Company** button. The list of insurance companies opens.
 - Double-click on a payer to which you want to apply the Pay-To Address override.
 - To ensure that your NPI is submitted correctly to your specific payer, confirm that the NPI scenario selected matches your scenario for the payer.
 - Check the “Show advanced settings” box.
 - Check the “Override pay-to address” box.
 - Enter the address to where payments are to be sent.
 - In the *Pay-to Name* field, enter the name of the Pay-To Address if desired.
 - Click **Save** in the *Override Claims Settings* window.
 - Click **Save** in the *Edit Provider* window.
 - Repeat for each specific payer.

 - ❑ To edit an existing override for a specific payer and add a Pay-To Address:
 - On the *Claim Settings* tab, double-click on an existing payer listed in the *Override Claim Settings* box.
 - Check the “Show advanced settings” box.
 - Check the “Override pay-to address” box.
 - Enter the address to where payments are to be sent.
 - In the *Pay-to Name* field, enter the name of the Pay-To Address if desired.
 - Click **Save** in the *Override Claims Settings* window.
 - Click **Save** in the *Edit Provider* window.
 - Repeat for each existing specific payer.

Patient Statements

- ❑ Update Practice Information zip codes and replace PO Boxes with physical addresses as noted in the first section above. Printed patient statements draw the address from the same *Contact Information* box entered under Settings > Practice Information.
- ❑ If the remit-to address for patient statements is a PO Box, enter it in either the *Administrator* or *Billing Contact* address fields and then update the *Remit Address* under Patient Statement Options:
 - Click **Settings > Practice Information**.
 - Enter the PO Box address under either the *Administrator* or *Billing Contact* section.

Contact Information

Address... Camillo Complete Healthcare Clinic
5700 Highland Ave., Ste 228
Manhattan Beach, CA 90267-1753

Web Site: http://www.camillo.org

Administrator

Name... Vince Donlon

Address... Camillo Complete Healthcare Clinic
PO Box 2812
Manhattan Beach, CA 90267-2812

Billing Contact

Name... Alicia Domiss

Address... Camillo Complete Healthcare Clinic
PO Box 2812
Manhattan Beach, CA 90267-2812

- Click **Save**.
- Click **Settings > Options > Patient Statement Options**.
- In the *Remit Address* field, select either *Administrator Address* or *Billing Contract Address* from the drop-down menu (select the one for which you entered the PO Box in the step above).

Formatting Options

Electronic Format: Standard Format

Practice Name: Custom Practice Name

Custom Name: Test #1

Practice Address: Billing Contact Address

Remit Address: Billing Contact Address

- Click **Save**.
- Repeat for each practice.

Capario 5010 Medicare Enrollment

- Medicare enrollments are back online with Capario for 5010. You can now enroll with Medicare payers.

Gateway 5010 Enrollment

- In preparation for the 5010 transition, the Medicare payers listed below will temporarily hold all new enrollments.
- If enrollment with these payers is required, please hold your forms until further notice.
- At this time, Gateway is not yet in 5010 production with these payers but is expected to be soon.

Trailblazers

WPS

Highmark Medicare Services

NGS Medicare Part A

- **Payer NE Medicaid:** Gateway EDI received notification that the 5010 Nebraska Medicaid Billing Provider Trading Partner Authorization forms that were submitted to Nebraska Medicaid have been rejected for a missing “Start Date” for 5010 transactions. Nebraska Medicaid is returning the rejected forms directly to providers requesting a start date be entered on the form.

If you receive the returned 5010 Nebraska Medicaid Billing Provider Trading Partner Authorization form, please add November 7, 2011 as the start date and return the paperwork directly to the payer. Gateway EDI will be able to begin testing once this is completed.

Nebraska Medicaid will not be moving anyone to 5010 production until January 1, 2012.

- **Payer Noridian Medicare:** In preparation for the 5010 transition, providers will need to enroll for 5010 in their Total OnBoarding account. Completion of the Total OnBoarding 5010 enrollment will ensure your claims and/or electronic remittance advices (ERAs) will be processed once Gateway EDI has moved to 5010 production with Noridian.