**IMPORTANT:** Apex EDI is not a billing company. As such, Apex EDI legally CANNOT advise on which adjustment reason codes to use in your secondary claims. If the EOB is missing an adjustment code, please click <u>here</u> to see a list of approved adjustment reason codes.

Apex EDI is capable of sending secondary claim information from the Primary insurance to the Supplemental insurance, however it will take a few extra steps to complete these claims online.

## Must First Receive an EOB

The first step in sending secondary claims is to have the Primary insurance send an EOB/ERA. This information is vital, as it will be required in order to send the EOB information to the secondary payer. Apex EDI is unable to attach the EOBs to your electronic claims, so you will need to transfer the information in the EOBs to certain fields in the claim.

## Editing the Primary Claim

Once the EOB is received, you will then need to find the claim within Apex that was sent to the primary insurance. If you need help with how to find that claim, click <u>here</u> for instructions. With the claim open, there are 5 areas that need to be changed:

- 1. Payer Information
- 2. Insured Information
- 3. Other Insurance information
- 4. Other Insurance Acknowledgment
- 5. Procedure code information

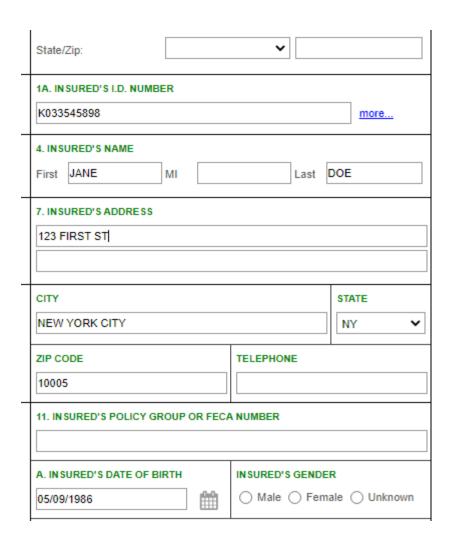
## **Payer Information**

This is the first box on the claim, and the area that you will want to put the secondary payer information. If this claim was originally submitted to the primary, and you are editing the claim for the secondary payer, then you'll need to replace all the primary information with the secondary information.

ELECTRONIC PAYER DESTINATION	PAYER INFORMATION	
United Healthcare of Alabama	Apex Payer ID:	UHC20
	Name:	UNITED HEALTHCARE
	Address 1:	
	Address 2:	
	City:	
	State/Zip:	•

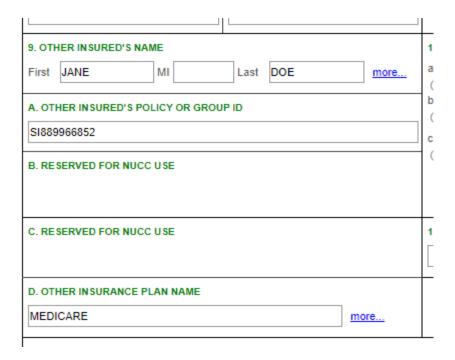
## **Insured Information**

These boxes are located just under the payer information box; just as the section prior, you will want to make sure that all the information in these boxes are switched to the secondary insurance information.



## Other Insurance Information

This area will all be located in box 9 of the Apex claim. You will want to include all the insured/subscriber information for the primary payer in these fields, including the subscriber ID and primary insurance name.



Note that there is a 'More' option in blue which will drop down more fields that need to be filled out. In these fields, the only information required is the basic information, like the subscribers address, gender and relationship to the patient.



# Other Insurance Acknowledgment

This field is in box 11d, which is located across from box 9d. This will just need the box to be marked **Yes** to acknowledge that this is a secondary claim.

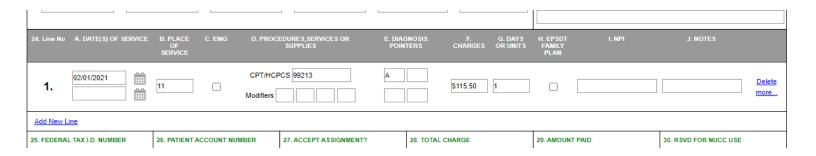


\*Note that you are not required to fill out the fields in boxes 11a-11c, but you are welcome to enter that information if you have it

## Procedure code information

This field will be the most time consuming and difficult part of secondary claims, and is where the EOB will be required. The procedure lines are located in box 24 of the Apex claims, and will normally just show the primary

procedure information.

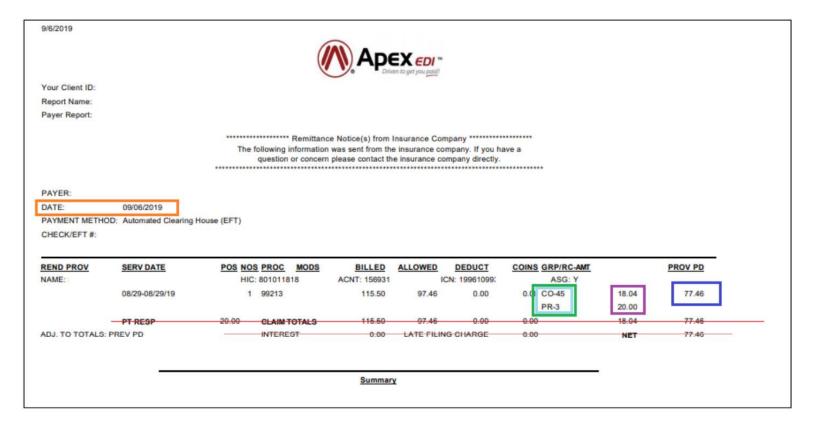


To add the secondary information, you will need to click on the **More** option in blue, which is located on the far right of the procedure line. This will show the fields that are required for secondary claim submission.



In this new area, you will need to move the information found in the EOB to the correlating fields. For convenience, the following images will show both a primary EOB as well box 24 filled out. The colored boxes show where the EOB information would be transferred to in box 24.

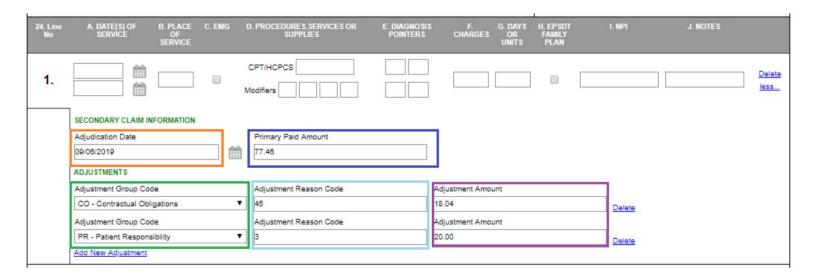
EOB



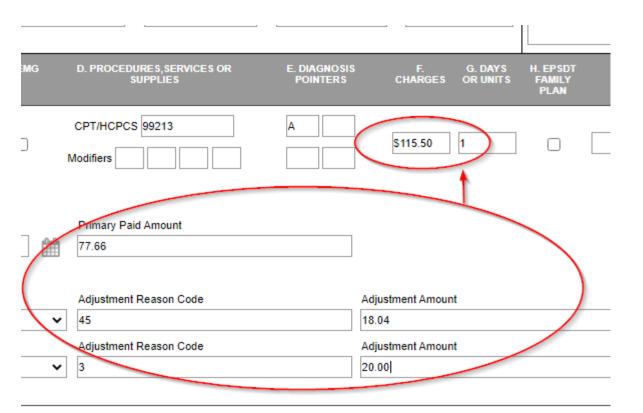
#### Box 24

If there are multiple adjustment reason codes sent for the procedure, you can click **Add New Adjustment** in blue and that will add a new adjustment line. Do this until you have enough lines for each adjustment code.





Make sure that all monetary amounts included all add up to the original charge.



Once filled out correctly, click the **Save Changes** button on the top right of the claim, and all that information will be sent to the secondary payer.