ITRANS Claim Director

INSTALLATION AND USER'S GUIDE

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LICENSES AND TRADEMARKS

Contents

Introduction to ITRANS Claim Director

Using Dentrix, you can send electronic claims over the Internet using ITRANS Claim Director. This guide includes information about sending electronic claims and how to install the necessary software.

The ITRANS Claim Service sends dental claims to insurance carriers using your Internet connection. To maintain the privacy and security of patient information when electronic claims are transferred, ITRANS restricts access to only those with a valid ITRANS eQualifID digital certificate.

Using the ITRANS Claim Service, your dental office will also have access to an ITRANS website. This website provides access to information about each claim that has left your office over the past 90 days, including the patient's name, the time the claim was sent, the insurance carrier, the type of transaction, error codes, and whether the claim was processed by the insurance carrier.

Enrolling in the ITRANS Claim Service

In order to successfully submit claims over the Internet, you will need to enroll in the ITRANS Claim Service and download/install the ITRANS provider Digital Certificate.

Note: The digital certificates needed for the ITRANS Claims Service are issued by Canadian Dental Association. The certificates are called the CDA Digital ID and are available directly from the CDA website.

To enroll in the ITRANS Claim Service

1. From your Internet browser, go to services.cda-adc.ca.
2. Login using your existing username and password for the CDA website. If you do not have a username and password, contact the CDA Practice Support Services Help Desk at (866) 788-1212.
3. Click **MY SUBSCRIPTIONS**.
4. Click **Subscribe**.
5. Follow the instructions to download the CDA Digital ID for each dentist in the office.

   Note: This should only be downloaded on the main ITRANS server computer.

6. Once the CDA Digital Certificate(s) finish downloading, contact Dentrix Customer Support at 844-346-0806 for assistance in installing the ITRANS software.

Note: If you have any questions related to CDA username and password or need other help with ITRANS, you can contact the CDA Practice Support Services Help Desk at 1-866-788-1212.

For more information, visit www.cda-adc.ca/en/services/itrans

To download and install the ITRANS Provider Digital Certificate

1. From your Internet browser, go to services.cda-adc.ca.
2. Have the provider log in using his or her existing username and password for the CDA website.
3. Click **My CDA Digital ID**.
4. Select office, and then click **Download Digital ID**.

Note: If you have any questions related to CDA username and password or need other help with ITRANS, you can contact the CDA Practice Support Services Help Desk at 1-866-788-1212.

To check if providers have Digital Certificates installed

1. Open Internet Explorer.
2. In the top-right corner, click the **Tools** icon, and then click **Internet options**.

3. Click the **Content** tab.

4. Click **Certificates**.

The certificates are listed on the **Personal** tab. They are issued to the actual provider's name and are issued by CanDentAssocCA.

Installing ITRANS Claim Director and CCDWS

Note: Before you begin, you will need to know the Windows username and password for the server computer where you will install ITRANS. This needs to be the username and password for the user that installed your ITRANS Certificates.

After registering the digital certificate from the Continovation Services Inc. website, you are ready to install and configure the ITRANS Claim Director software on your computers. You will download and install ITRANS Claim Director on each computer where you will be submitting electronic claims, beginning with the ITRANS server.

You will need to download and install two different software programs to use ITRANS: ITRANS Claims Director and CCDWS.

Please contact Dentrix Support at 1-800-781-5230 to have a customer support representative upload the needed software to your office. The customer support representative can also help with the installation of ITRANS.

To download and install ITRANS Claim Director on the ITRANS server

1. In your Internet browser, go to cda-adc.ca/get/.

2. Under **ICD Software for ITRANS 2.0**, click **ICD for Windows**.
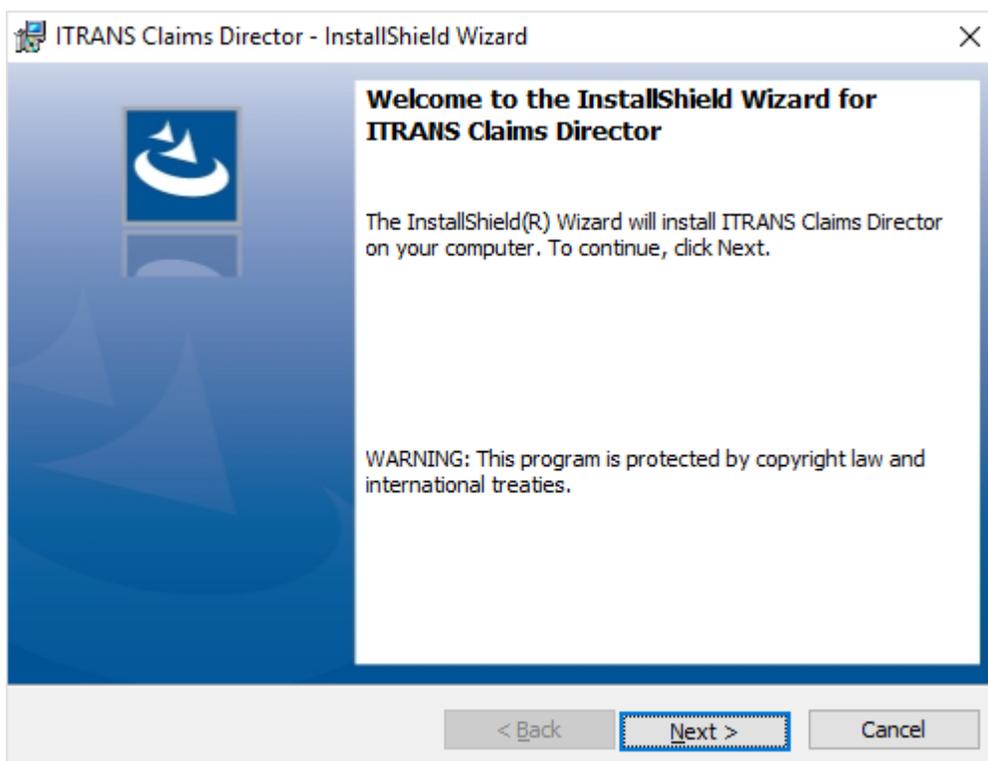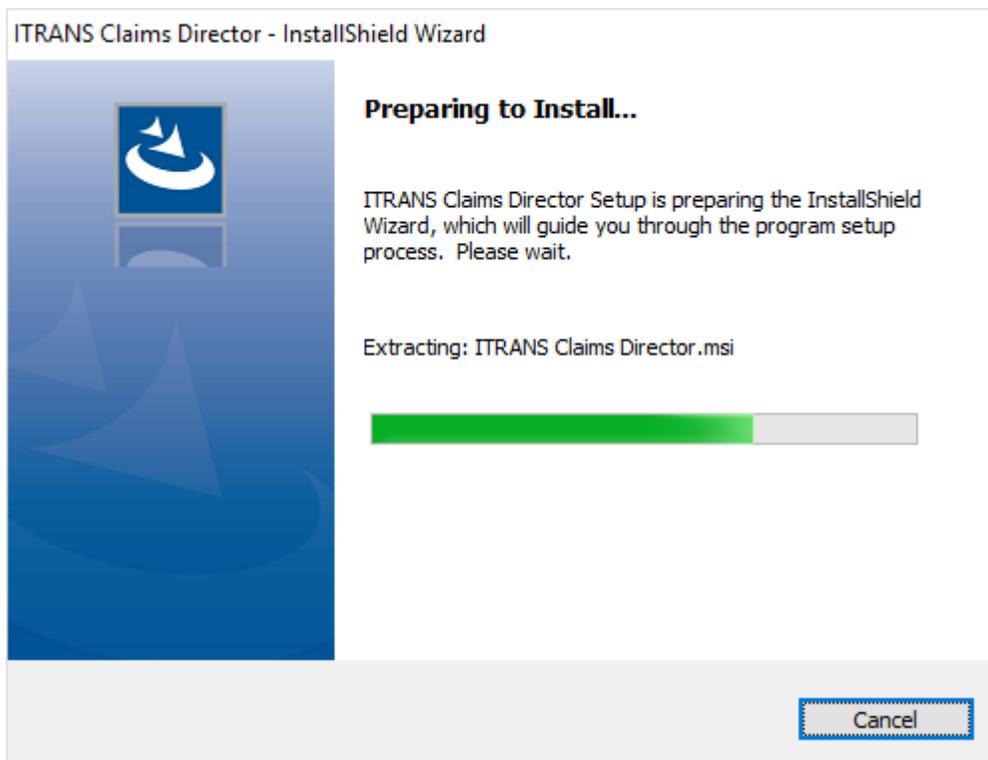
    After the ITRANS software downloads, double-click the download file to run the Setup program.

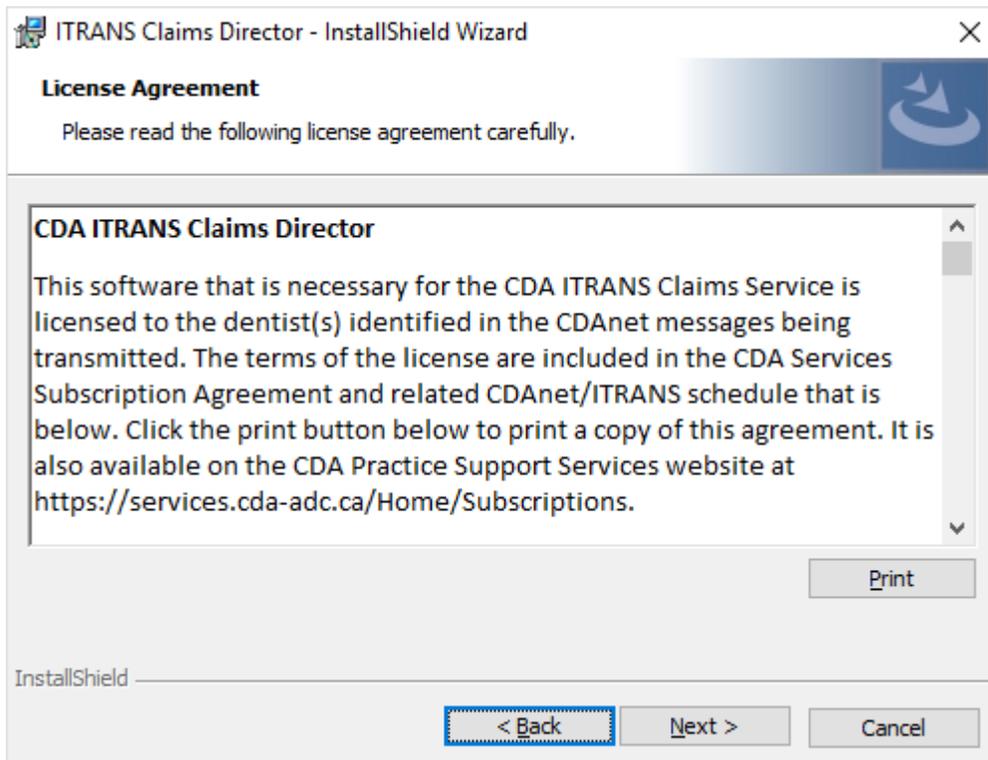   The **Select the language** screen appears.
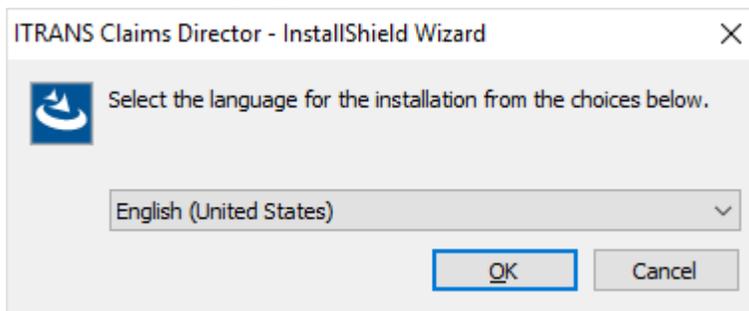
3. Leave **English** selected as the language (or change the language as needed), and then click **OK**.

    The **Preparing to Install** screen appears followed by the **Welcome** screen.

ITRANS Claims Director - InstallShield Wizard

Preparing to Install...

ITRANS Claims Director Setup is preparing the InstallShield Wizard, which will guide you through the program setup process. Please wait.

Extracting: ITRANS Claims Director.msi

Cancel

ITRANS Claims Director - InstallShield Wizard   ✕

Welcome to the InstallShield Wizard for ITRANS Claims Director

The InstallShield(R) Wizard will install ITRANS Claims Director on your computer. To continue, click Next.

WARNING: This program is protected by copyright law and international treaties.
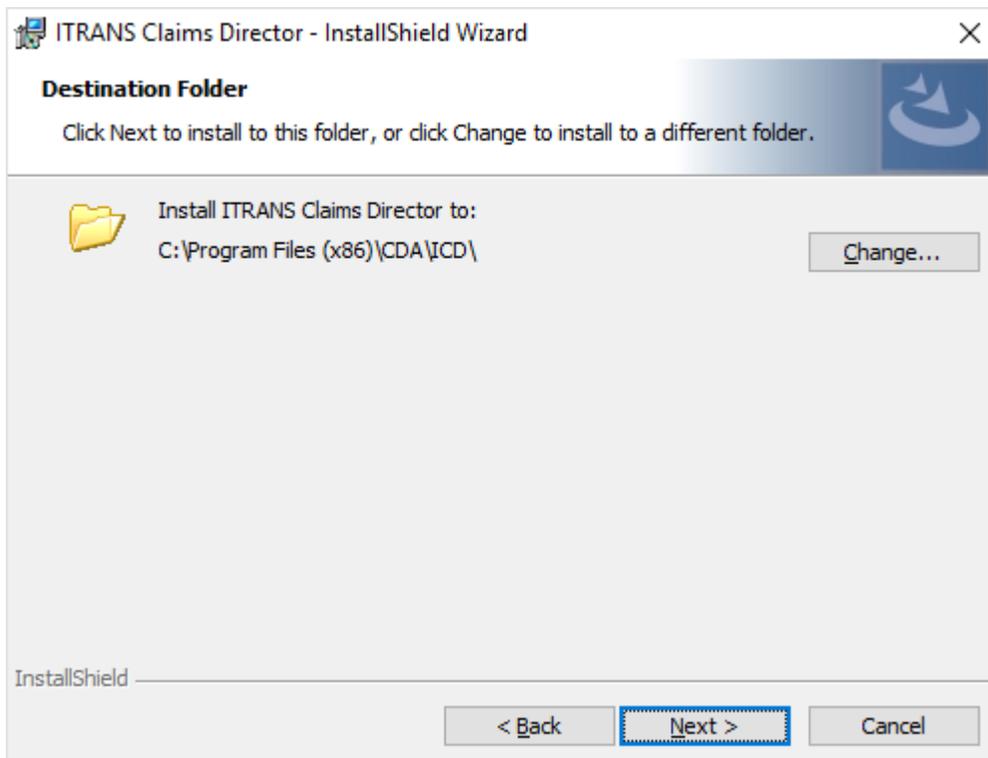
< Back   Next >   Cancel

4. Click **Next**.

The **License Agreement** screen appears.

5.   Click **Next**.

The **Destination Folder** screen appears.

6.   Accept the default install location (or click **Change** and specify a new location if you need to), and then click **Next**.

The **Service Logon Account Information** screen appears.

7. In the **User name** and **Password** boxes, type the Windows username and password for the Windows user account on this server used to install ITRANS, and then click **Next**.
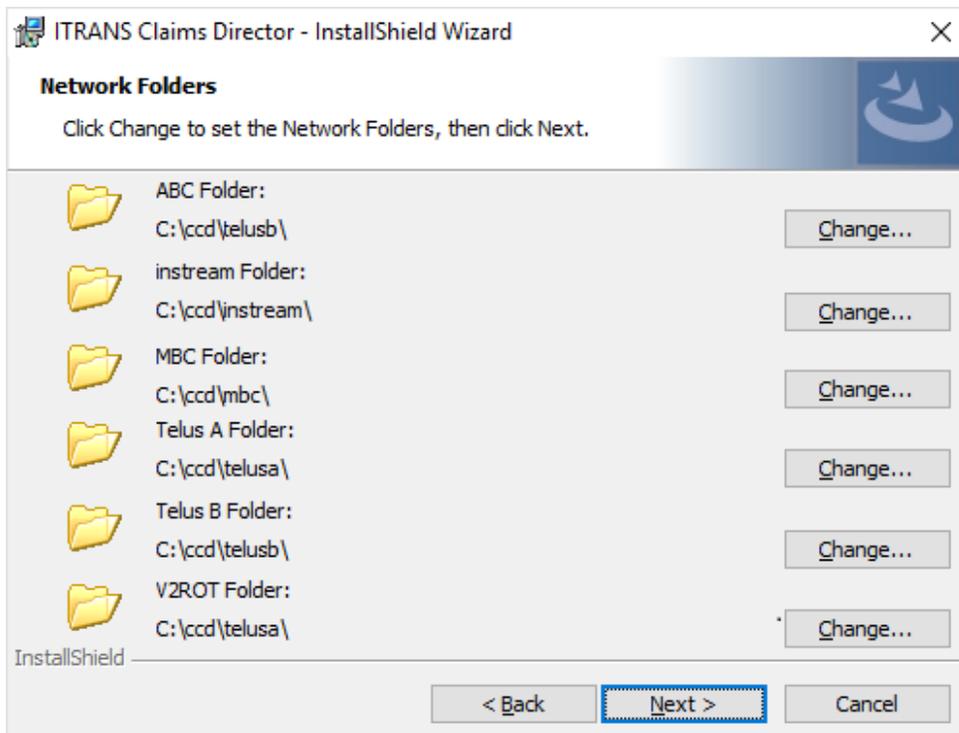
The **ICD Folder** screen appears.

8. Click **Change**, click the create new folder icon, name that folder ITRANS, and click to select it.
9. Make sure the folder name is set to C:\ICD\ITRANS, and then click **Next**.

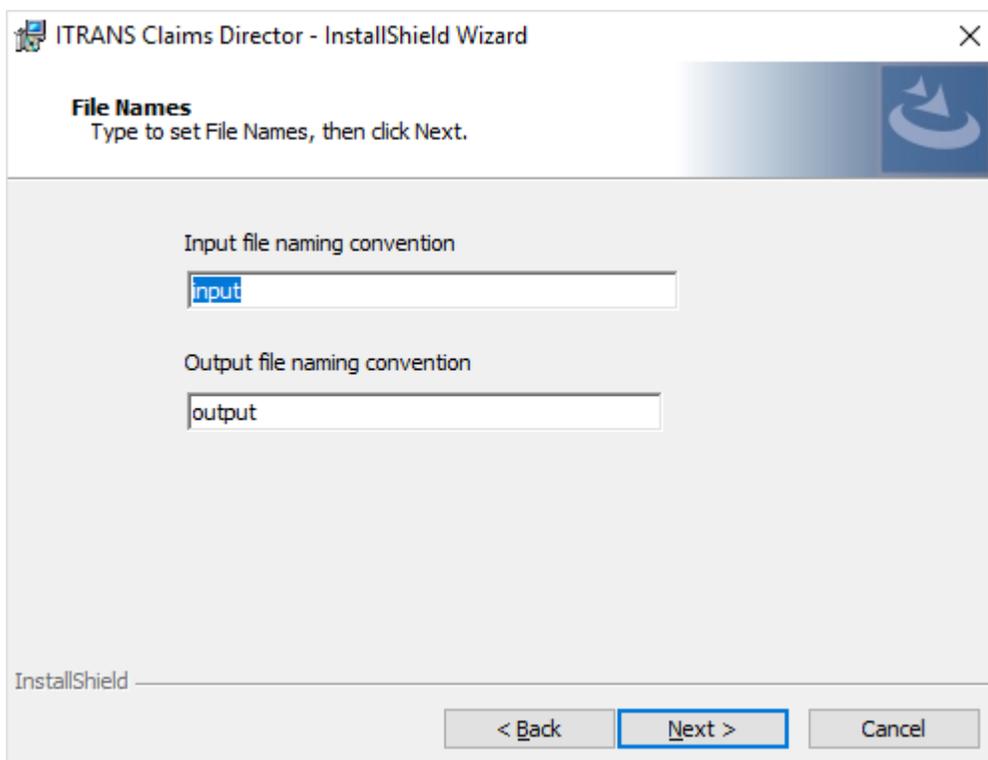The **Time when ICD application checks for updates** screen appears.
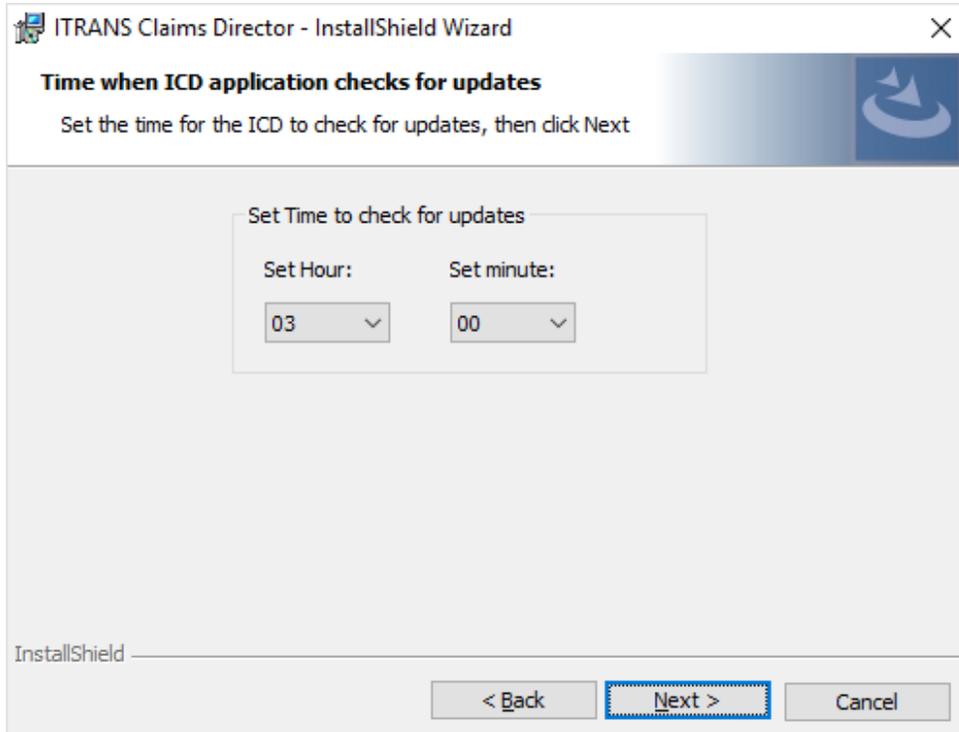
10. Use the **Set Hour** and **Set minute** boxes to set the time for the ICD application to check for updates, and then click **Next**.

The **Network Folders** screen appears.

11. Next to **ABC Folder**, click **Change**, and set that folder to c:\ccd\telusb.

12. Accept the default network folder locations for all other folders (or click **Change** and specify a new locations if you need to), and then click **Next**.
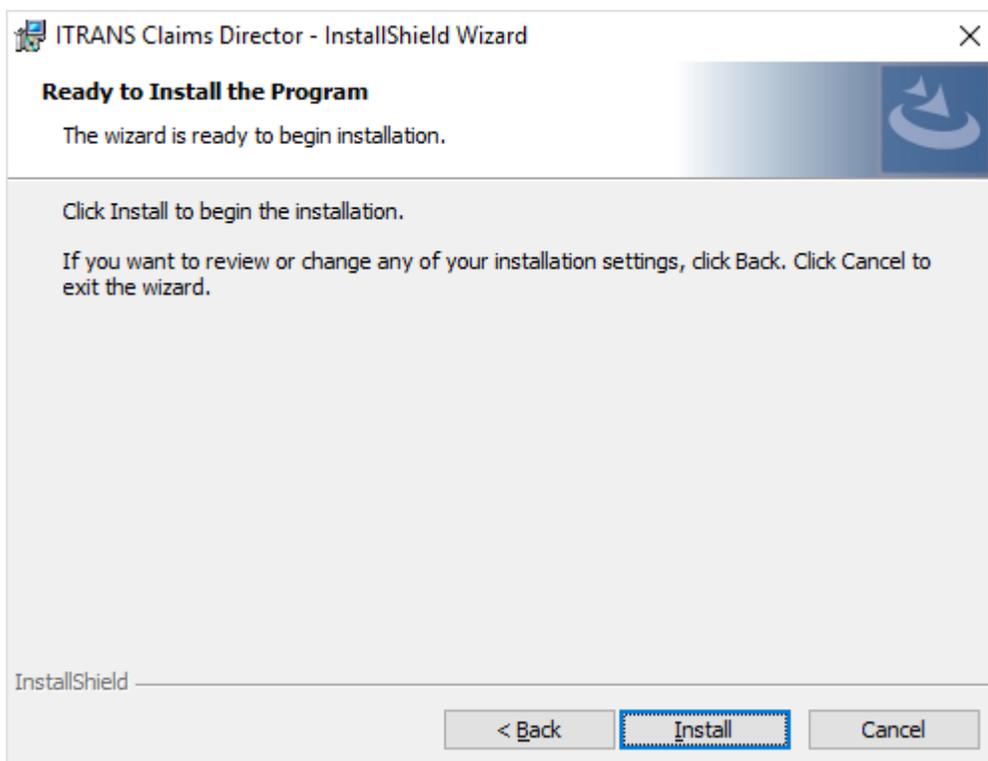
The **File Names** screen appears.

13. Click **Next**.

The **Ready to Install** screen appears.

14. Click **Install**.

The **Installing ITRANS Claims Director** screen displays the status of the installation.
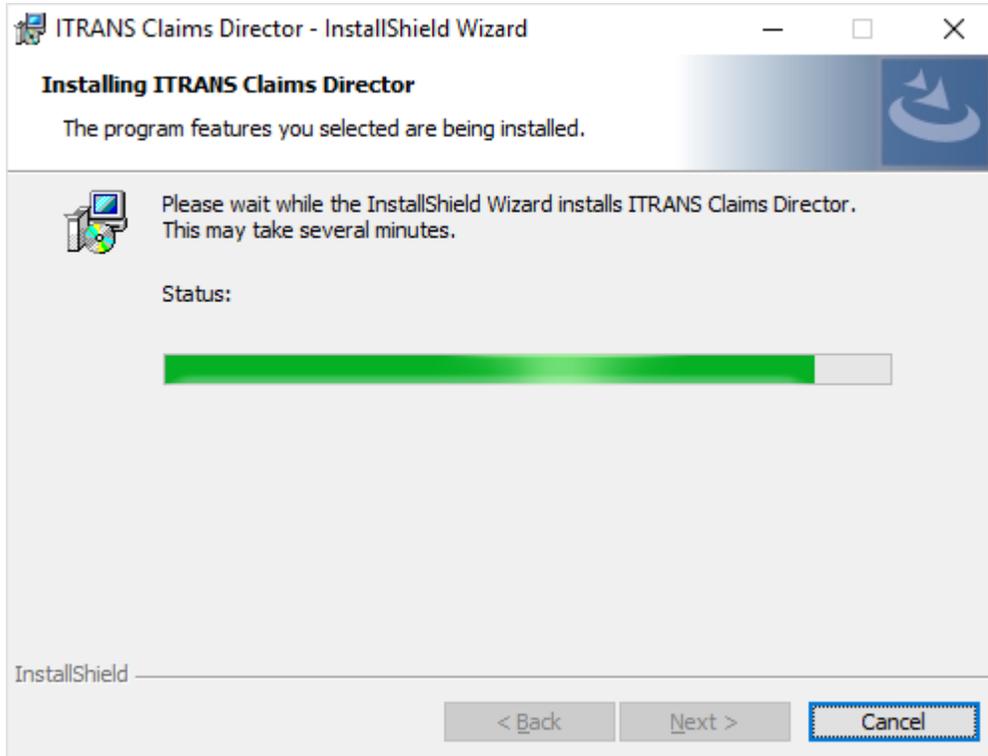
To download and install CCDWS on the ITRANS server

1. In your Internet browser, go to cda-adc.ca/get/.

2. Under **CCDWS Communication Software for CDAnet**, click **CCDWS for Windows**.

    After the CCDWS software downloads, double-click the ccdws-latest-win-install.exe download file to run the Setup program.

    The **Welcome** screen appears.
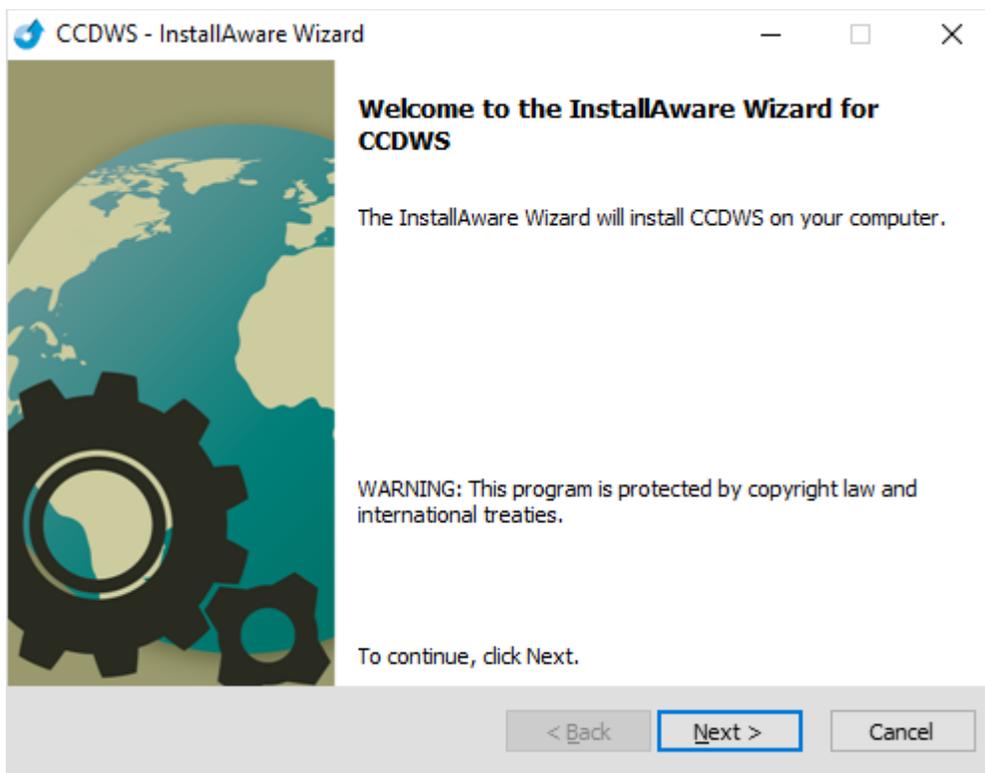
3. Click **Next**.

    The **License Agreement** screen appears.

4. Click **I accept**, and then click **Next**.

The **Import Information** screen appears.
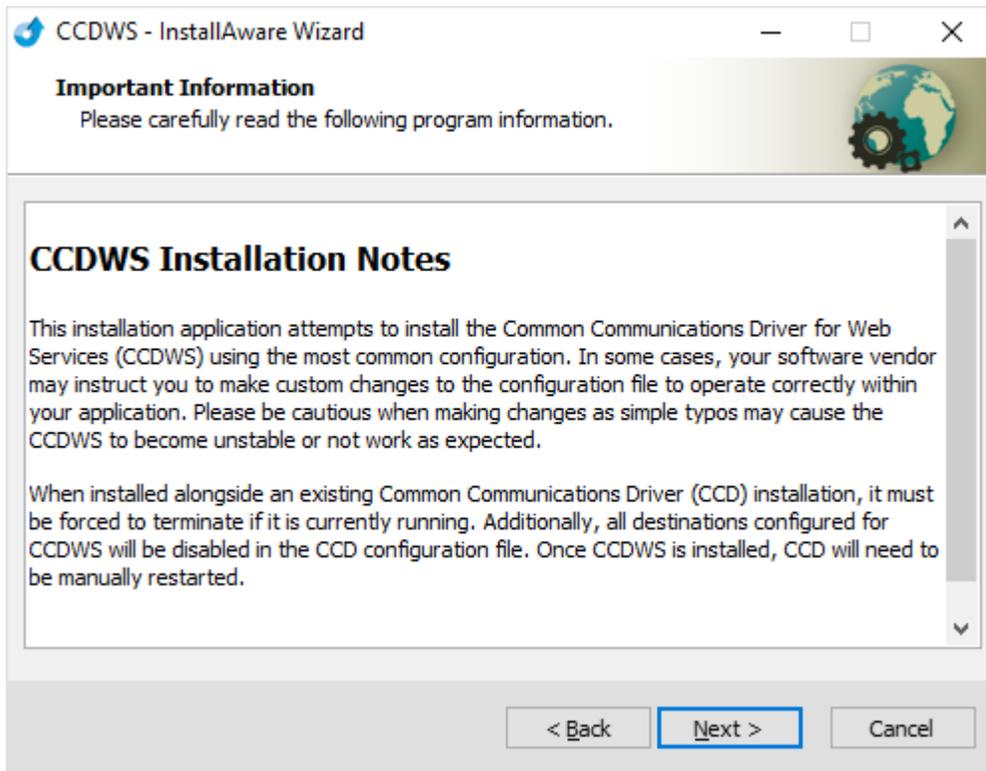
5. Click **Next**.

The **Destination Folder** screen appears.
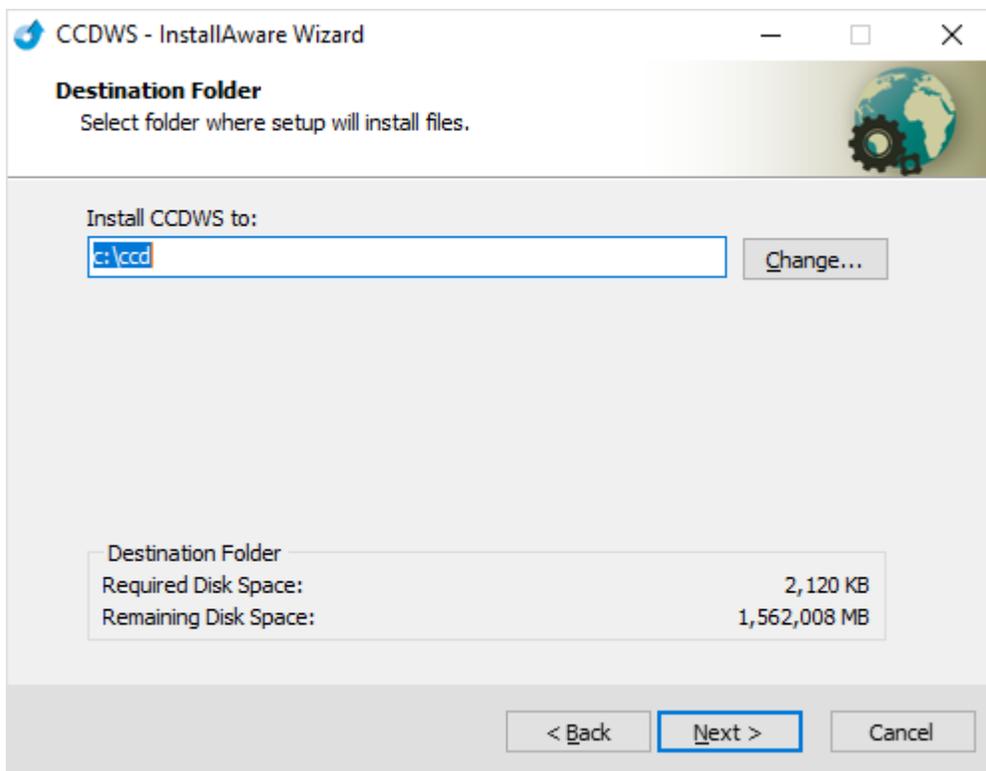
6. Click **Next**.

The **Setup Type** screen appears.

7. Leave **Complete** selected, and then click **Next**.

8. In the **Service User Account** and **Service User Password** boxes, type the Windows username and password for the Windows user account on this server used to install ITRANS, and then click **Next**.

The **Completing the InstallAware Wizard for CCDWS** screen appears.

9.   Click **Next**.

The **Installing CCDWS** screen appears and shows the installation status.
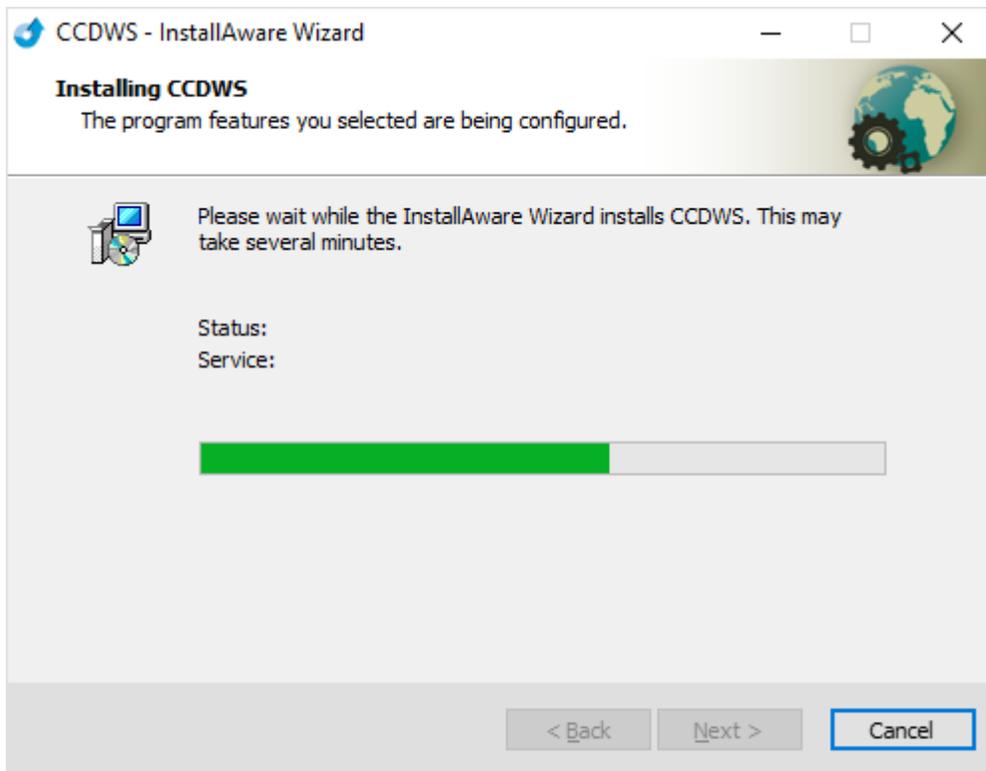
When finished, a **Configuration Review** message appears.
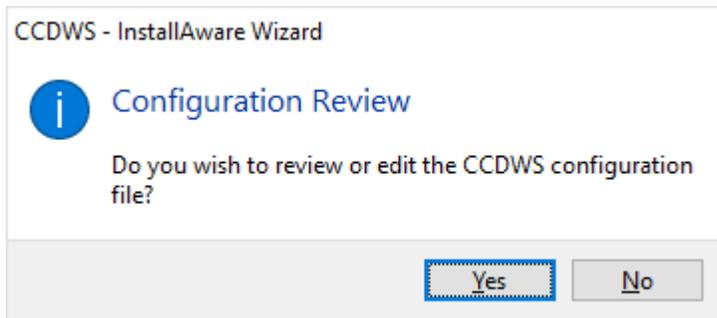
10. Click **No**.

The **Successfully completed** screen appears.

11. Click **Finish**.

Copying and Configuring .ini Files

You will also need to copy and make some small configuration changes in two .ini files that are used by ITRANS Claim Director.

To copy and configure the CDANet.ini and CCD.ini files

1. Open Notepad (or another text editor).

2. In Notepad, open the CDANet1.ini file from: \\fs1\installs\Dentrix\Dentrix International\Canada\ Eclaims\INI Files\itrans\ITRANS 2.0

3. Make the following changes in the CDANet1.ini file:

    DatabasePath=[the path to the folder where the ITRANS database is located]

    > Note: This is not needed on Dentrix G7.1 or later. For Dentrix versions older than G7.1, this should be the path of the CCD folder.

    EXEPATH=[Dentrix Program Files Path] Example: C:\Program Files (x86)\Dentrix
    CCDPath=[Path to the folder where the CCD.ini file is located]
    DataPath=[Path to the ICD folder]

4. After completing the configuration for the CDANet1.ini file, save the CDANet1.ini file in the C:\ Windows folder, and then click **File > New** to close the .ini file.

5. In Notepad, open the CCD.ini file from: \\fs1\installs\Dentrix\Dentrix International\Canada\Eclaims\ INI Files\itrans\ITRANS 2.0

6. Save the CCD.ini into the CCD folder (this should correspond to the CCDPath you configured inside the CDANet1.ini file in step 3).

7. To sharing the CCD folder (so the workstations are able to use ITRANS), in Windows File Explorer, right-click the CCD folder, and from the shortcut menu, click **Properties**.

8. Click the **Sharing** tab.

9. Click **Advanced Sharing**.

10. Select **Share this folder**.

11. Click **Permissions**.
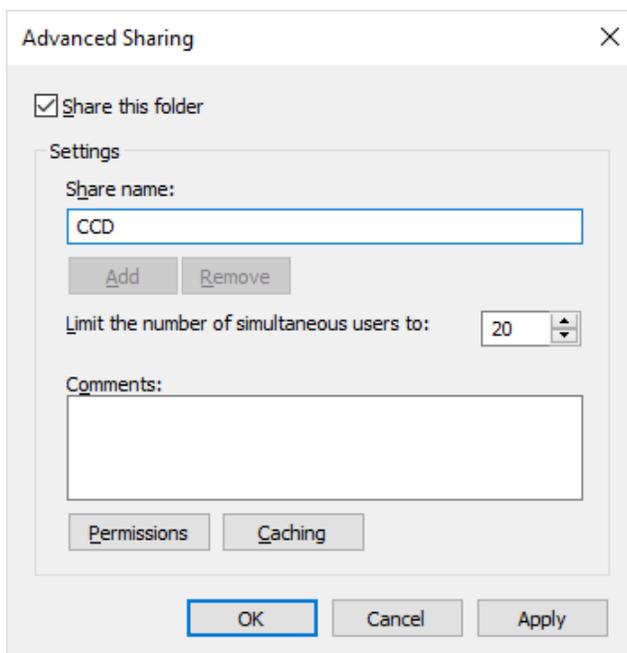
12. Select **Everyone**, and then select **Full Control**.
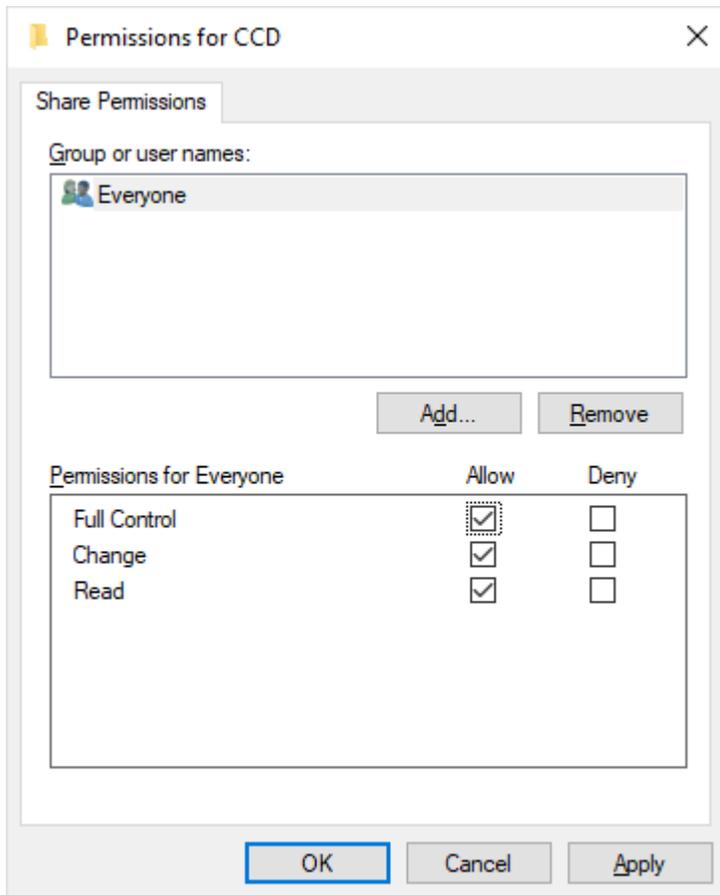
13. Click **OK**.
14. Repeat steps 7-13 to share the ICD folder also.

Setting Up and Sending Electronic Claims

After you install ITRANS Claim Director, you need to set up your software to send and receive electronic claims.

Note: ITRANS does not make any sounds when sending the claim. Do not be alarmed if you hear nothing after you send a claim. Just wait for the printout to verify all claims were transmitted.

Setting up and sending electronic claims in Dentrix

When creating electronic claims in Dentrix, the claims need to be sent to the Batch Processor rather than to the printer. This is set up by default, but you will want to verify that Dentrix is using the correct setting.

To verify that electronic claims will be sent to the Batch Processor

1.   In the Ledger, from the **File** menu, click **Direct Processing Options Setup**.

     The **Direct Processing Options Setup** dialog box appears.

2.   Under **Insurance Claims**, verify that **Batch** is selected.

3.   Click **OK**.

To send electronic claims

1.   From the Batch Processor in the Office Manager, select all claims that you want to send electronically. (To select multiple claims, press the CTRL key on your keyboard while selecting the claims.)

2.   On the Office Manager toolbar, click the Electronic Claim Submission button [⚡] .

     The **Electronic Claims Submission** dialog box appears.
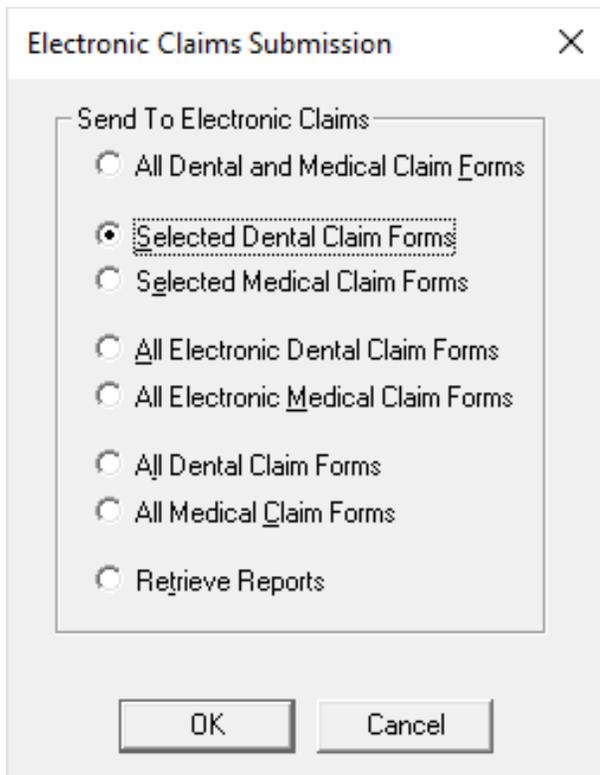
3. Make sure **Selected Dental Claim Forms** is selected.

4. Click **OK**.

The selected claims are verified and sent. While the claims are being sent, the CDANet window will appear.

This may take a few minutes, depending on how quickly the electronic claims process and the number of claims you send.

After the submission is complete, the window closes and a transmission report is sent to your printer.

Frequently Asked Questions

Q: How does ITRANS Claim Director work?

A: When you use ITRANS Claim Director to send electronic claims, ITRANS receives the claims and checks them for completeness of data and appropriate formatting. Claims that fail these checks will be returned to you with a message explaining any errors, allowing you to correct the errors and resubmit the claims. ITRANS detects duplicate submissions and allows authorized individuals to investigate the status of a claim while ensuring that privacy laws are respected. Once all information is verified, ITRANS forwards the claim to the specified insurance carrier for automatic processing by its claims system. Because electronic claims are processed automatically, the insurance carrier can transmit an explanation of benefits (EOB) through ITRANS back to your dental office in real time, typically less than 60 seconds.

Q: Does ITRANS replace CDAnet?

A: No, ITRANS works with CDAnet, it does not replace it. CDAnet is a standards development and administrative unit within CDA. ITRANS is a transaction product of Continovation Services Inc., a subsidiary of CDA, and implements standards for the transmission of health claims. ITRANS continues to use CDAnet when sending electronic claims. While CDAnet is limited to dental-specific transactions, ITRANS is specifically designed to address the electronic messaging needs of any health community and to support the implementation of new standards as they become available.

Q: Will ITRANS allow the dental community or others to access confidential information?

A: No. ITRANS operates within in a secure system; all data is handled in accordance with privacy legislation and consent requirements.

Q: Are there any costs involved with switching to ITRANS?

A: Dentrix and Henry Schein One do not add additional fees if an office chooses to use ITRANS instead of CDAnet. Doctors who are members of the Canadian Dental Association will not see any extra fees for using the ITRANS service.

Q: What are the system requirements for ITRANS?

A: The ITRANS product requires access to the Internet and a current Internet browser (Google Chrome is recommended). You must have JavaScript and Cookies enabled in your Internet browser (options/ preferences). If you use Google Chrome or Internet Explorer, these are enabled by default. For further information, please contact Dentrix Customer Support at 1-800-336-8749.

Q: Can electronic claims be sent through ITRANS to all insurance companies?

A: ITRANS Claim Director can send to all insurance companies currently supporting electronic claim submissions. Like eClaims for CDAnet, you still need to know the insurance company's carrier ID and claim format. To get a list of insurance companies and their assigned carrier IDs and claim formats, contact Dentrix Customer Support at 1-800-336-8749.

For more information on sending claims in Dentrix, refer to the Dentrix User's Guide or Dentrix Help.