

A faded background image showing a healthcare professional in a white coat interacting with an elderly woman who is smiling. The professional has their hand on the woman's shoulder. The image is overlaid with decorative wavy lines in teal and pink, and a pattern of grey dots.

*first*CONNECT Quick Guide

o patients before paperwork

Login

Website: <https://firstconnect.payerlink.com/>

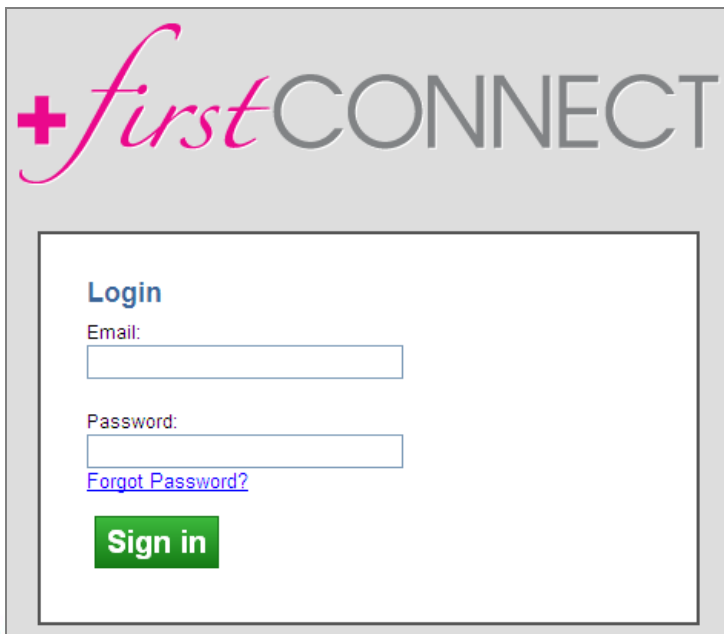
Email: enter the address provided by your agency for *firstCONNECT* access

Default Password: 1Connect

Default Security Question

Question: What is your favorite sports team?

Answer: Cardinals



firstCONNECT

Login

Email:

Password:

[Forgot Password?](#)

Sign in

HELPFUL TIPS

If you're accessing *firstCONNECT* using Internet Explorer, you must have version 7.0 or newer.

You may not log in more than once at a time with a given user ID. Instead, you must have completely separate logins.

You will not be prompted to change your password every X days. Whatever you first choose will remain your password until you forget it or wish to change it.

Use the **Forgot Password? link if you can't remember the new password you chose for your account. You'll be prompted to enter your email address and answer the security question. Once you click **Reset**, an email will be sent to you with a new temporary password. You'll be prompted to change the password immediately upon login.*

Main Menu



Click this icon to go back to this screen regardless of where you are within *first*CONNECT.



Use this icon to update your password and/or security question.



You **must** click this icon to properly log out of the *first*CONNECT system. If you do not properly log out, a security feature is activated that will prevent you from logging back in for the next 20 minutes. An attempt to log in during this timeframe will display an “Already Logged In” message.



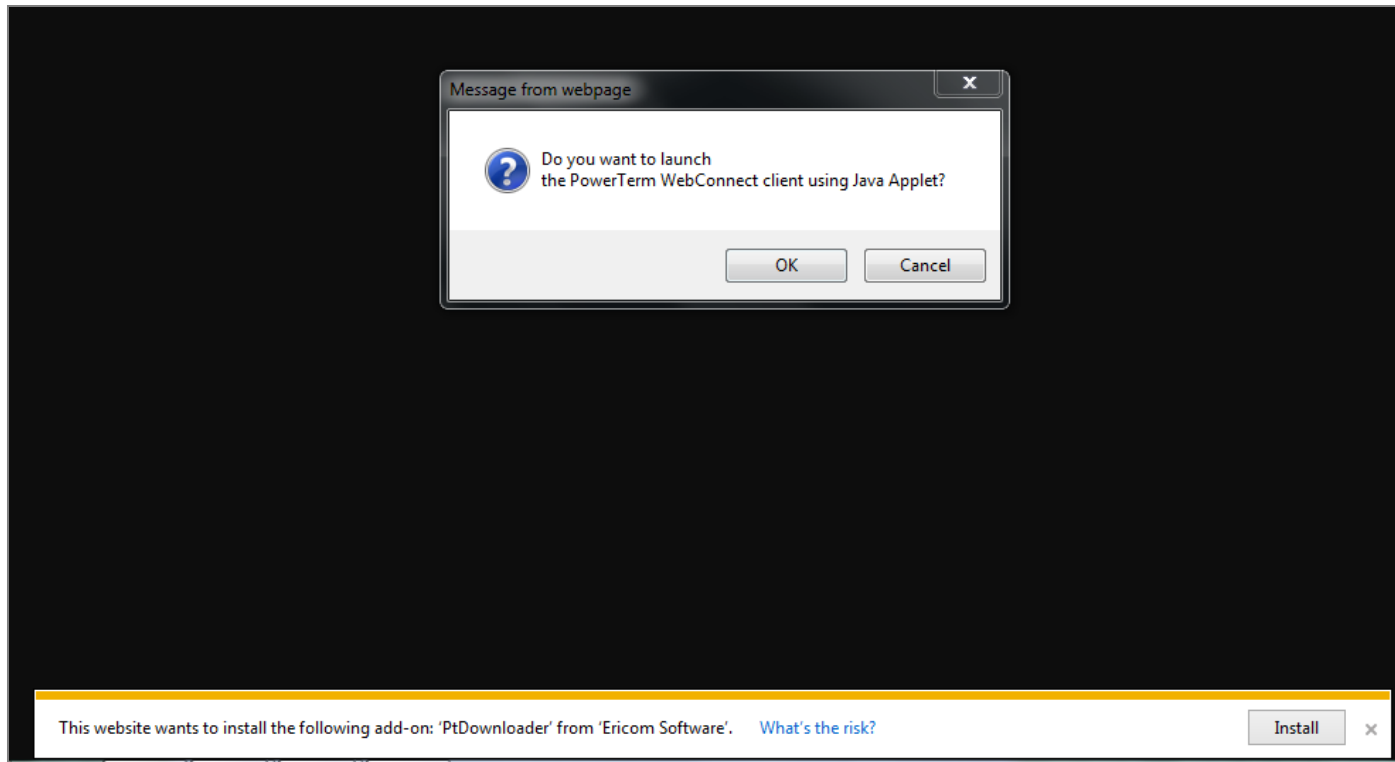
DDE



DDE – Installing DDE

1. Click DDE button.
2. Click OK to install “PtDownloader”

**You must have administrative rights on your computer to install. This is a one-time install. The only exception is if it is opened on a new computer.*



DDE – Entering the DDE/CMS Screen

First screen prompts you to “Enter Request”

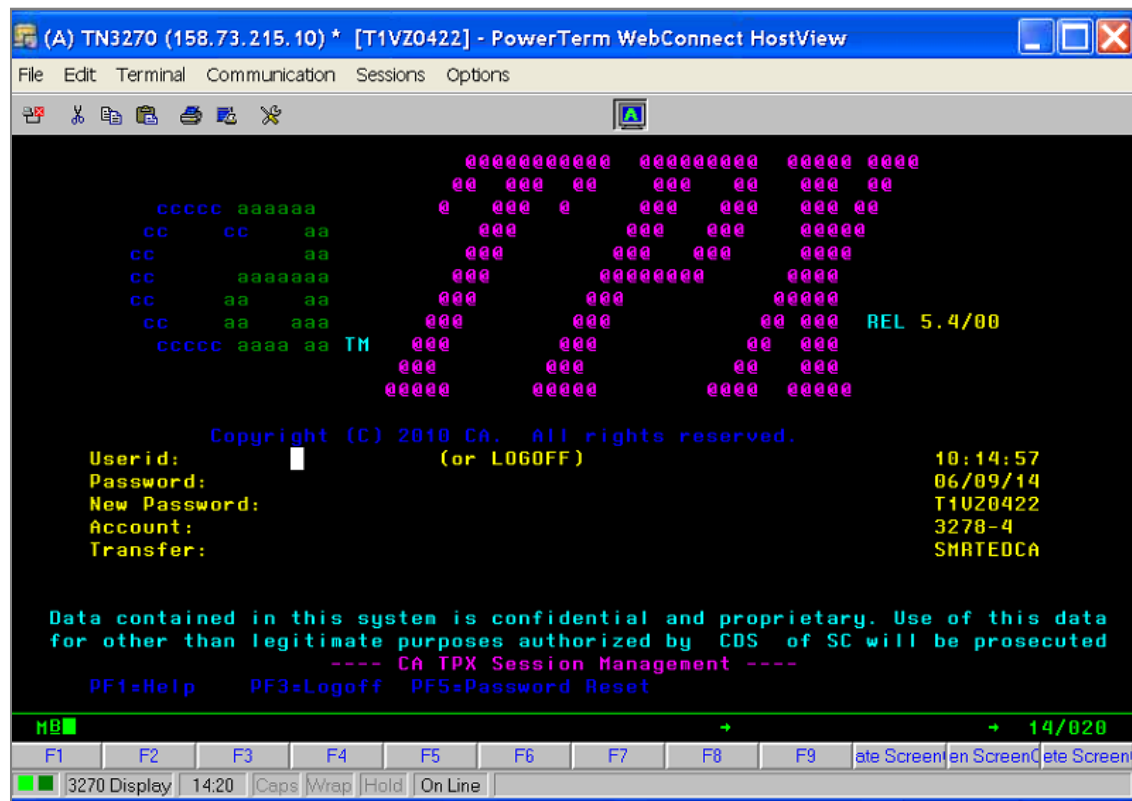
- PGBA – Type “1” and click Enter.
- CGS – Type “2” and click Enter.
- NGS – Type “5” and click Enter.

```
(A) TN3270 (158.73.215.10) * [T1VZ0422] - PowerTerm WebConnect HostView
File Edit Terminal Communication Sessions Options
CMSMS610 Centers For Medicare & Medicaid Services
HPES Enterprise Data Center
CCCCCCCCCCCC M M SSSSSSSSSSSSS
CC CC MM MM SSS SSS
CC MM MM MM MM SSS SSS
CC MM MM MM MM SSSSSSSSSSSSS
CC MM H MM SSS
CC MM MM SSS
CC MM MM SSS
CCCCCCCCCCCC MM MM SSSSSSSSSSSSS
UNAUTHORIZED ACCESS TO THIS COMPUTER SYSTEM IS PROHIBITED BY LAW (REF. TITLE
18 U.S.C. SECTION 1030). This is a CMS computer system and is provided for the
processing of Official U.S. Government information. All data contained herein
is owned by CMS and, for the purpose of protecting the rights and property of
CMS, may be monitored, intercepted, recorded, read, copied, or captured in
any manner and disclosed in any manner by authorized personnel. If you are
not authorized access to this system you must immediately exit.
1 CDS
2 HP (CMS Menu now obsolete)
3 BDC
4 NONEDC
5 HP TPX
T1VZ0422 - HP ENTER REQUEST ==>
HB + 24/037
F1 F2 F3 F4 F5 F6 F7 F8 F9 ate Screen en Screen ete Screen
3270 Display 24:37 Cens Wzard Hold On Line
```


DDE – Logging Into DDE

Enter your normal DDE User ID and Password from CMS. **If you encounter any issues or cannot remember your login information, you'll need to contact CMS.*

Reports accessed through here are in HIQH and HIQA format. You can view claims once the 277CA has processed.



```
(A) TN3270 (158.73.215.10) * [T1VZ0422] - PowerTerm WebConnect HostView
File Edit Terminal Communication Sessions Options

cccc  aaaaaa
cc   cc   aa
cc   aa
cc   aaaaaa
cc   aa   aa
cc   aa   aaa
cccc  aaaa  aa TM

                                REL 5.4/00

Copyright (C) 2010 CA. All rights reserved.

Userid:      █                (or LOGOFF)
Password:
New Password:
Account:
Transfer:

                                10:14:57
                                06/09/14
                                T1VZ0422
                                3278-4
                                SMRTEDCA

Data contained in this system is confidential and proprietary. Use of this data
for other than legitimate purposes authorized by CDS of SC will be prosecuted
----- CA TPX Session Management -----
PF1=Help   PF3=Logoff  PF5=Password Reset





MB █
+
+ 14/020
F1 F2 F3 F4 F5 F6 F7 F8 F9 ate Screen en Screen ate Screen
3270 Display 14:20 Caps Wrap Hold On Line
```

File Transfer



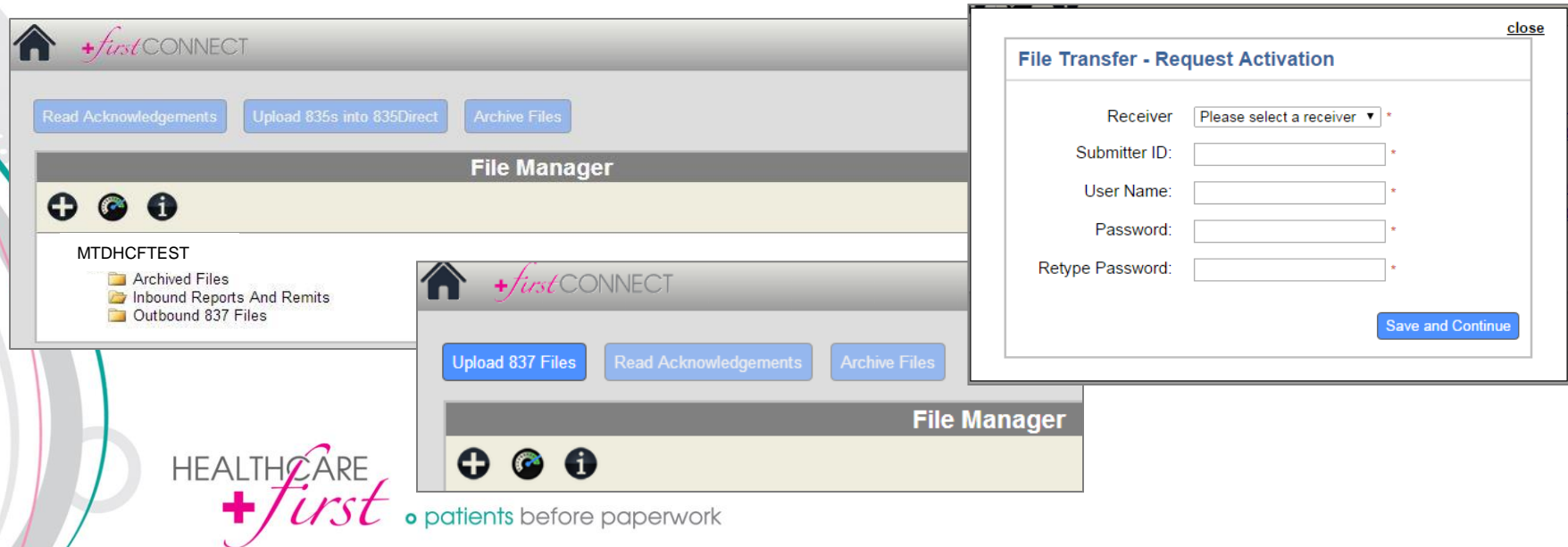
File Transfer – File Manager

There are 4 icons visible from the initial File Manager screen within the File Transfer section.

-  • Use this to add a new Submitter ID to your account
-  • Clicking this icon displays the **Claims Reconciliation Grid**
-  • The icon is color-coded green for new messages and red for existing messages
-  • This is used to view logs of files uploaded with a 'received by' date

In addition, 3 of 4 buttons appear depending on your setup.

- **Upload 837 Files** – Visible only for agencies setup for Manual Upload, not Auto.
- **Read Acknowledgements** – Always visible. Used for reading response files.
- **Upload 835s into 835Direct** – Visible only for agencies setup for Auto Upload, not Manual.
- **Archive Files** – Always visible. Used for manually archiving files.



The screenshot displays the firstCONNECT File Manager interface. At the top, there are three buttons: "Read Acknowledgements", "Upload 835s into 835Direct", and "Archive Files". Below these is the "File Manager" section, which includes three icons (Add, Claims Reconciliation Grid, and Information) and a list of folders for the submitter "MTDHCFTST": "Archived Files", "Inbound Reports And Remits", and "Outbound 837 Files". A smaller version of the File Manager interface is shown below, featuring the "Upload 837 Files", "Read Acknowledgements", and "Archive Files" buttons.

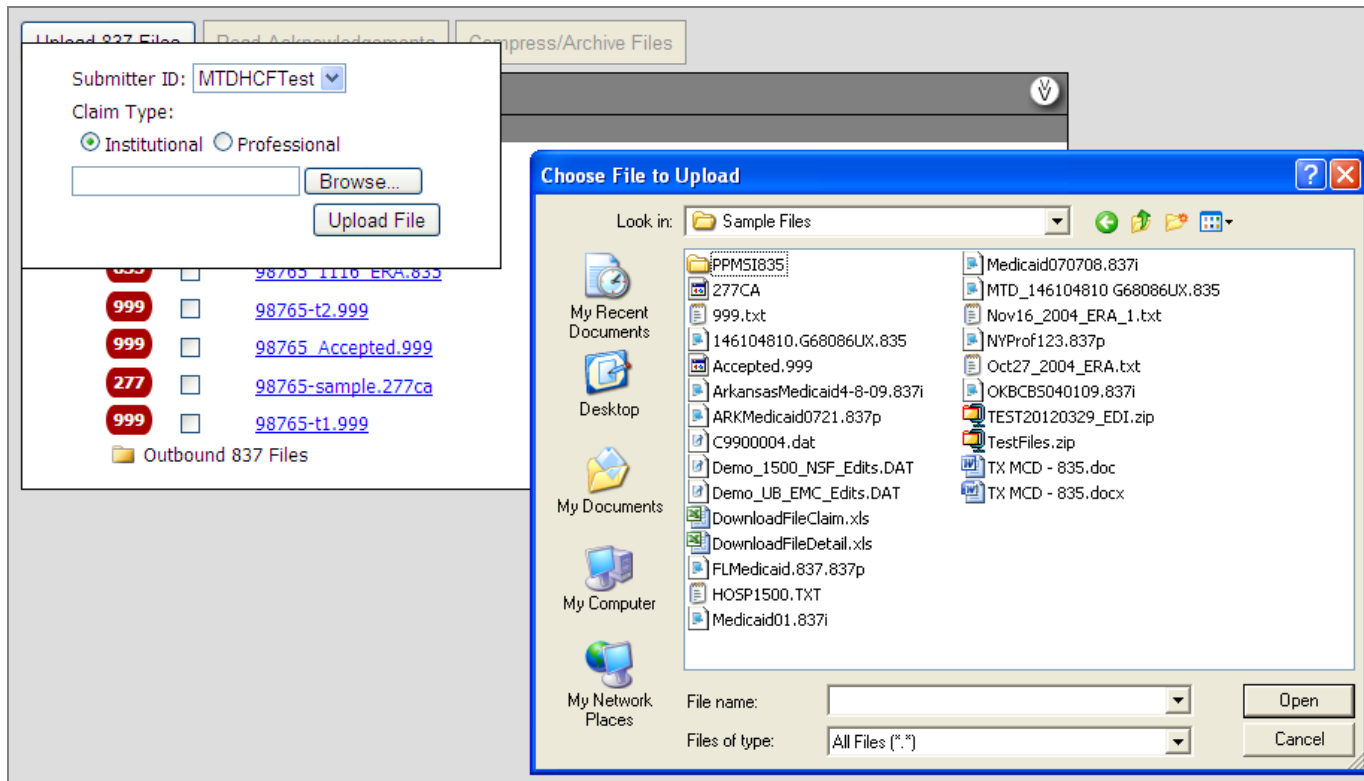
Overlaid on the right is a "File Transfer - Request Activation" dialog box. It contains the following fields:

- Receiver: *
- Submitter ID: *
- User Name: *
- Password: *
- Retype Password: *

A "Save and Continue" button is located at the bottom right of the dialog box. A "close" link is visible in the top right corner of the dialog box.

File Transfer – Manual Upload

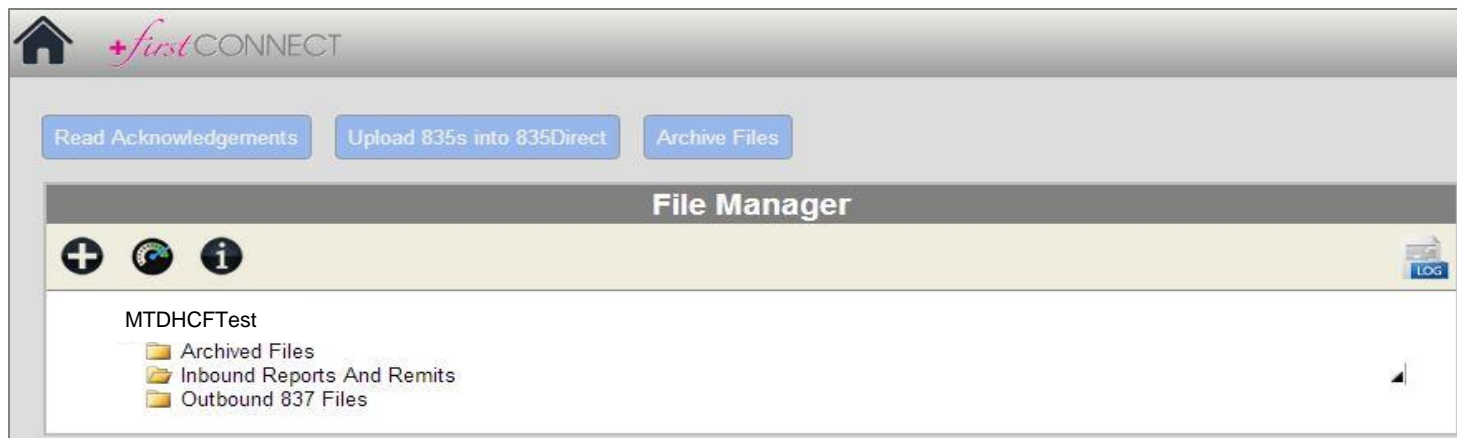
Agencies set up for Manual Upload can upload 837 claim files that are generated from various different systems, including HEALTHCARE *first* Enterprise Edition. To do so, first click on the **Upload 837 Files** button. This displays a small popup. Institutional should remain selected for **Claim Type**. Click **Browse** within the popup to find the file you wish to upload. This does display another small popup. Select the desired file, click **Open**, then click **Upload File**.



File Transfer – Auto Upload

Agencies set up for Auto Upload automatically send files to the Outbound 837 Files folder from within HEALTHCARE *first* Enterprise Edition. These agencies do not see the **Upload 837 Files** button.

Auto Upload occurs from within HEALTHCARE *first* Enterprise Edition by going through Accounts | Billing | Download Claims | clicking \$ sign | Select MAC | clicking Process Claims in Grid. Once the Process Claims in Grid button is clicked the batch will automatically flow to the **Outbound 837 Files** folder within *first*CONNECT.



File Transfer – Outbound 837 Files

Once a file is uploaded into *first*CONNECT, whether Manual or Auto, it appears in the **Outbound 837 Files** folder until it's sent to Medicare. As soon as the file uploads to Medicare, it disappears from view.

Files in the Outbound 837 Files folder are automatically sent to Medicare every hour and half hour.

The screenshot displays the 'File Manager' interface within the 'Transaction Log' section. At the top, there are three buttons: 'Upload 837 Files', 'Read Acknowledgements', and 'Compress/Archive Files'. Below these, the 'File Manager' area shows a tree view of folders and a list of files. The folders include 'MTDHCFTest', 'Archived Files', 'Inbound Reports And Remits', and 'Outbound 837 Files'. The 'Outbound 837 Files' folder is expanded, showing a list of files with checkboxes, file names, and timestamps.

File ID	File Name	Timestamp
999	98765-t2.999	7/9/2012 10:52:34 AM
835	98765_1116_ERA.835	7/17/2012 9:20:39 AM
999	98765-t2.999	7/17/2012 9:18:08 AM
999	98765_Accepted.999	7/17/2012 9:09:45 AM
277	98765-sample.277ca	7/9/2012 10:52:34 AM
999	98765-t1.999	7/9/2012 10:52:34 AM
	Sample.837i	7/9/2012 10:51:44 AM
	Sample-p.837p	7/9/2012 10:51:44 AM
	98765-MUOBTSUB-1-20100624122156.837i	7/9/2012 10:51:44 AM
	98765-MUO11111-1-20090724115925.837i	7/9/2012 10:51:44 AM

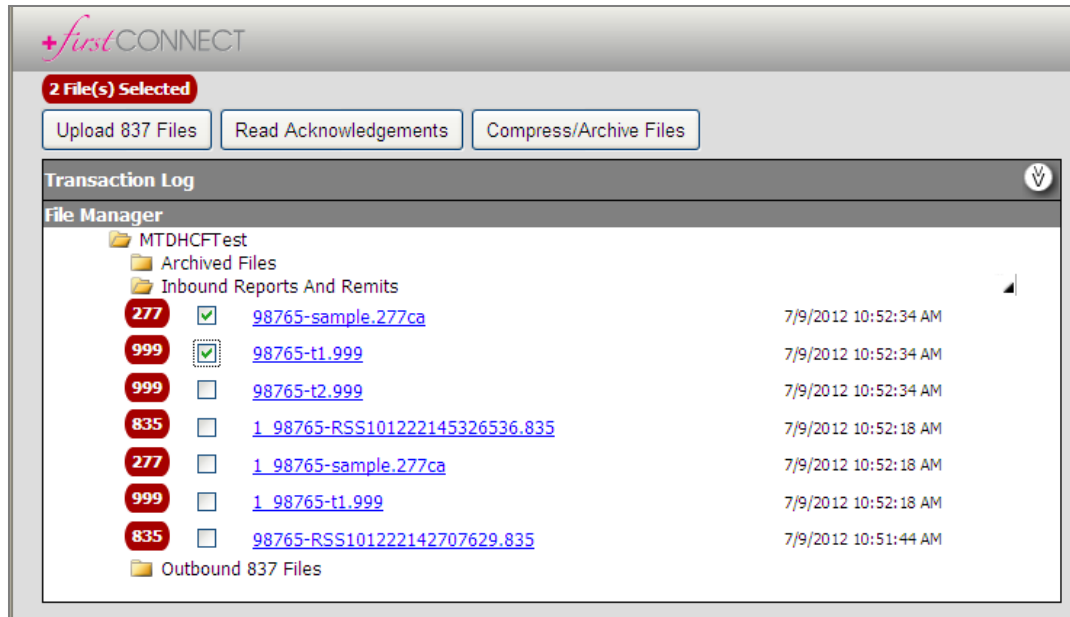
File Transfer – Inbound Reports and Remits

View 999 and 277 (RSP) files

- Select individual or multiple files.
- Click the **Read Acknowledgements** button. This displays a new window.

A 999 file will come back first, followed by a 277, and finally an 835 file.

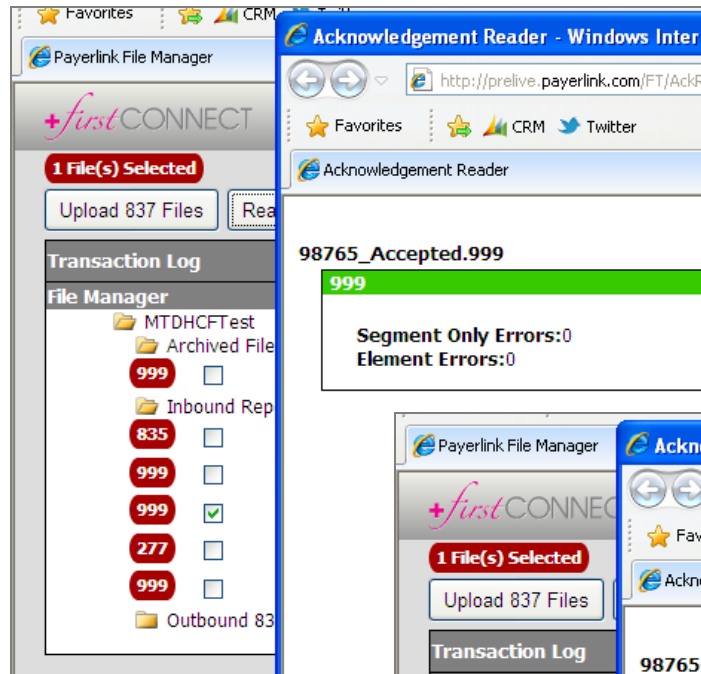
**835 files are not readable with the method described above and must be viewed with a special reader or posted to your software system.*



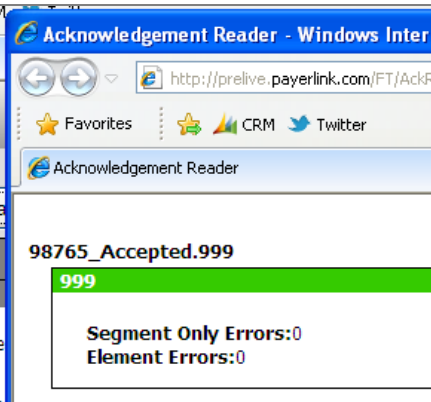
The screenshot shows the firstCONNECT File Manager interface. At the top, it says '+firstCONNECT' and '2 File(s) Selected'. Below this are three buttons: 'Upload 837 Files', 'Read Acknowledgements', and 'Compress/Archive Files'. The main area is titled 'Transaction Log' and 'File Manager'. It shows a folder structure with 'MTDHCFTest' containing 'Archived Files' and 'Inbound Reports And Remits'. The 'Inbound Reports And Remits' folder is expanded, showing a list of files with their status (277, 999, or 835), a checkbox, a filename, and a timestamp.

File Type	Selected	Filename	Timestamp
277	<input checked="" type="checkbox"/>	98765-sample.277ca	7/9/2012 10:52:34 AM
999	<input checked="" type="checkbox"/>	98765-t1.999	7/9/2012 10:52:34 AM
999	<input type="checkbox"/>	98765-t2.999	7/9/2012 10:52:34 AM
835	<input type="checkbox"/>	1_98765-RSS101222145326536.835	7/9/2012 10:52:18 AM
277	<input type="checkbox"/>	1_98765-sample.277ca	7/9/2012 10:52:18 AM
999	<input type="checkbox"/>	1_98765-t1.999	7/9/2012 10:52:18 AM
835	<input type="checkbox"/>	98765-RSS101222142707629.835	7/9/2012 10:51:44 AM

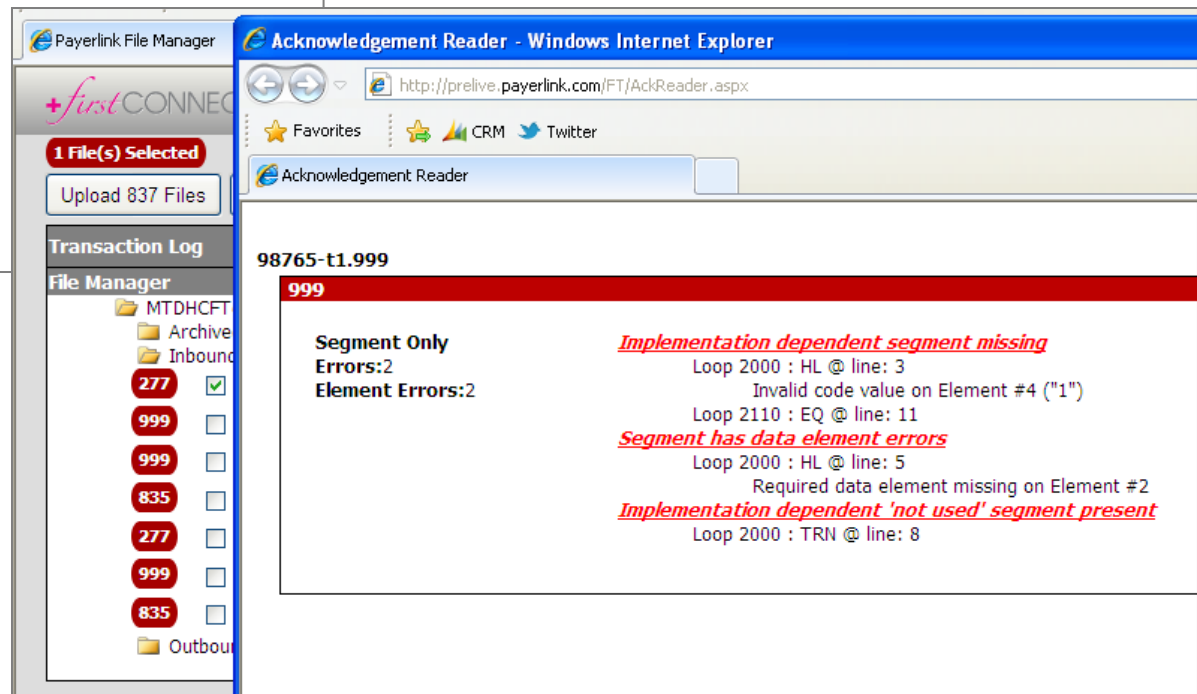
File Transfer – 999 Response File Example



An example of an accepted 999 is shown at left.



An example of a rejected 999 is shown below.



File Transfer – 277CA Response File Example

An example of an 277CA Claim Status file is shown below (*one file split into 2 images*). **Green** indicates accepted claims and **red** indicates rejected claims.

```

98765-sample.277ca
277
Payer:TEST 5010 PART B ( PPPPP )
Receiver: MASTERS CLINIC ( NNNNNNNNNN )
Batch ID: 000003
Rejected Amount: $1900.00
Accepted Amount: $4588.00
Rejected Quantity: 2
Accepted Quantity: 12
(WQ) Accepted
(A1) Acknowledgement/Receipt-The claim/encounter has been received. This does not mean that the claim has been accepted for adjudication.
(19) Entity acknowledges receipt of claim/encounter. Note: This code requires use of an Entity Code.
Provider: MASTERS CLINIC ( NNNNNNNNNN )
1234-1 - PUBLIC, JOHN
Policy: 111111111F
Date of service: 20090828
Payer Claim Control #: MB-ICN
(WQ) Accepted
(A2) Acknowledgement/Acceptance into adjudication system-The claim/encounter has been accepted into the adjudication system.
(20) Accepted for processing.
1234-2 - PUBLIC, JOHN
Policy: 111111111F
Date of service: 20090828
Payer Claim Control #: MB-ICN
(WQ) Accepted
(A2) Acknowledgement/Acceptance into adjudication system-The claim/encounter has been accepted into the adjudication system.
(20) Accepted for processing.
PAS2420Fx.NM103.0001 - TEST, PART
Policy: 111111111F
Date of service: 20090701
Payer Claim Control #: MB-ICN
(WQ) Accepted
(A2) Acknowledgement/Acceptance into adjudication system-The claim/encounter has been accepted into the adjudication system.
(20) Accepted for processing.
    
```

Any necessary corrections to claims must be made directly in DDE or within the agency software.

```

1234-4 - PUBLIC, JOHN
Policy: 111111111F
Date of service: 20090828
Payer Claim Control #: MB-ICN
(WQ) Accepted
(A2) Acknowledgement/Acceptance into adjudication system-The claim/encounter has been accepted into the adjudication system.
(20) Accepted for processing.
1234-5 - PUBLIC, JOHN
Policy: 111111111F
Date of service: 20090828
Payer Claim Control #: MB-ICN
(U) Rejected
(A7) Acknowledgement/Rejected for Invalid Information - The claim/encounter has invalid information as specified in the Status details and has been rejected.
(S04) Entity's Last Name. Note: This code requires use of an Entity Code.
(DN) Referring Provider
(512) Length invalid for receiver's application system. Note: At least one other status code is required to identify the data element in error.
1234-6 - PUBLIC, JOHN
Policy: 111111111F
Date of service: 20090828
Payer Claim Control #: MB-ICN
(U) Rejected
(A7) Acknowledgement/Rejected for Invalid Information - The claim/encounter has invalid information as specified in the Status details and has been rejected.
(S04) Entity's Last Name. Note: This code requires use of an Entity Code.
(PR) Payer
(511) Invalid character. Note: At least one other status code is required to identify the data element in error.
    
```

File Transfer – Download Response Files

999 and 277 files can also be downloaded by clicking directly on the name of the file (*blue hyperlink*) from the listing of files. Opening the file using the hyperlink causes them to display in a format that is not easily readable.

The screenshot shows the Payerlink File Manager interface. On the left, the 'File Manager' section displays a tree view with folders like 'MTDHCFTest', 'Archived Files', and 'Inbound Reports And Remits'. A list of files is shown, including '98765-sample.277', '98765-t1.999', '98765-t2.999', '1_98765-RSS1011', '1_98765-sample.', '1_98765-t1.999', and '98765-RSS10122'. Each file has a red circular icon with a number (277, 999, 835) and a checkbox. The '98765-sample.277' file is selected, and its name is a blue hyperlink. On the right, the browser window shows the download response file content, which is a text-based EDI file format. The browser address bar shows the URL: http://prelive.payerlink.com/FT/FT_main.aspx?download=MTDHCFTest\inbox\98765-sample.277ca. The response file content is as follows:

```
ISA*00*          *00*          *27*PPPPP          *27*SSSSSS          *091006*1250~
GS*HN*SSSSSS*PPPPP*20091006*1250*1234*X*005010X214~
ST*277*999000002*005010X214~
BHT*0085*08*BATCH0001*20091006*1250*TH~
HL*1**20*1~
NM1*PR*2*TEST 5010 PART B*****PI*PPPPP~
TRN*1*0001~
DTP*050*D8*20091006~
DTP*009*D8*20091006~
HL*2*1*21*1~
NM1*41*2*MASTERS CLINIC*****XX*NNNNNNNNNN~
TRN*2*000003~
STC*A1>19*20091006*WQ*6488~
QTY*90*12~
QTY*AA*2~
AMT*YU*4588~
AMT*YY*1900~
HL*3*2*19*1~
NM1*85*2*MASTERS CLINIC*****XX*NNNNNNNNNN~
HL*4*3*PT~
NM1*QC*1*PUBLIC*JOHN*Q***MI*111111111F~
TRN*2*1234-1~
STC*A2>20*20091006*WQ*950~
REF*1K*MB-ICN~
DTP*472*D8*20090828~
HL*5*3*PT~
NM1*QC*1*PUBLIC*JOHN*Q***MI*111111111F~
```

File Transfer – Download 835s (Remits) for Posting

Click directly on the file name (*blue hyperlink*) to open and save an 835 file. This may display a small popup at the bottom of the screen asking if you want to Open or Save. Click the down arrow next to Save and choose **Save As**. Select the appropriate location to save the file. Close the popup box.

**Save As may not be available for selection if you're using Google Chrome.*

Open and view the 835 file using **PCPrint** or **EasyPrint**, which are both free readers found on the **CMS website**.


The screenshot shows a file list with columns for file name, date, and time. A pink arrow points to the file name 'ERN00011.ERN.835_06042014171509.26'. Below the list, a dialog box asks 'Do you want to open or save ERN00003.ERN.835_06072014061457.04 from firstconnect.payerlink.com?'. The dialog box has 'Open', 'Save', and 'Cancel' buttons. A pink arrow points to the down arrow next to the 'Save' button.

File Name	Date	Time
ERN00015.ERN.835_06072014071749.27	6/7/2014	7:17:43 AM
ERN00014.ERN.835_06062014061425.46	6/6/2014	6:14:20 AM
ERN00013.ERN.835_06052014061415.23	6/5/2014	6:14:09 AM
ERN00012.ERN.835_06042014171509.26	6/4/2014	5:15:04 PM
ERN00011.ERN.835_06042014171509.26	6/4/2014	5:15:01 PM
ERN00010.ERN.835_06042014171509.26	6/4/2014	5:15:00 PM
ERN00009.ERN.835_06042014171509.26	6/4/2014	5:14:59 PM
ERN00008.ERN.835_06042014171509.26	6/4/2014	5:14:58 PM
ERN00007.ERN.835_06042014171509.26	6/4/2014	5:14:57 PM
ERN00006.ERN.835_06042014171509.26	6/4/2014	5:14:56 PM
ERN00005.ERN.835_06042014171509.26	6/4/2014	5:14:53 PM
ERN00004.ERN.835_06042014171509.26	6/4/2014	5:14:53 PM
ERN00003.ERN.835_06072014061457.04	6/7/2014	6:14:57 AM









**Agencies contracted for ERA with HEALTHCAREfirst Enterprise Edition may upload the 835 files directly to the system by going through Accounts | Payments | Electronic Remittance Upload. This process is typically covered in a Billing Posting Session with a HEALTHCAREfirst trainer.*

**Agencies must be setup to receive electronic remits with their Medicare Administrative Contractor (MAC) in order for any of these files (999, 277, or 835) to be available within firstCONNECT. This setup process may take up to 7 business days.*

File Transfer – Claims Reconciliation Grid

This screen is visible by clicking the  icon from the initial File Manager screen.

It provides you with an overview of each batch that has been submitted including the dates each file was transmitted (*both outgoing and incoming*). You also have the ability to view the 999 and 277 files from this screen by clicking directly on the blue hyperlinks.

Claim File Reconciliation									
Receiver	837 Sent	Claims	Billed	999	277	Accepted	Rejected		
Palmetto	6/7/2014 12:29:59 PM	136	\$1,488,900.87	6/7/2014 1:13:15 PM	6/7/2014 2:12:49 PM	136		999 277	
Palmetto	6/7/2014 11:39:47 AM	9	\$86,126.44	6/7/2014 12:13:06 PM	6/7/2014 12:13:07 PM	9		999 277	
Palmetto	6/5/2014 3:57:31 PM	3	\$155,895.00	6/5/2014 4:13:40 PM	6/5/2014 5:13:13 PM	3		999 277	
Palmetto	6/4/2014 4:10:21 PM	28	\$215,155.74	6/4/2014 5:12:57 PM	6/4/2014 5:12:58 PM	28		999 277	
Palmetto	6/4/2014 3:26:29 PM	1	\$9,600.21	6/4/2014 4:13:12 PM	6/4/2014 4:13:13 PM	1		999 277	
Palmetto	6/4/2014 3:07:44 PM	1	\$6,515.00	6/4/2014 4:13:11 PM	6/4/2014 4:13:13 PM		1	999 277	
Palmetto	6/4/2014 2:59:13 PM	1	\$2,295.00	6/5/2014 7:14:07 AM	6/5/2014 8:13:47 AM	1		999 277	
Palmetto	6/3/2014 12:15:24 PM	27	\$305,925.00	6/3/2014 1:14:19 PM	6/3/2014 1:14:21 PM	27		999 277	

Previous 1 Next Late Rejected

File Transfer – Archived Files

There are 3 options for archiving files within *first*CONNECT.

- **Automatic Archive** – All files in the Inbound folder automatically move to the Archived folder after 10 days. These files will never be deleted and will always be accessible.
- **Manual Archive to Server** – You may manually move files to the Archived folder prior to the 10 day auto-archive by checking the box next to the desired file and then clicking the **Archive Files** button. If the “Compress and Archive Files” box appears, simply click OK without a filename.
- **Manual Archive to PC** – You may also manually archive/save files to your PC. Follow the same steps as for archiving to the Server, except this time be sure to enter a filename in the “Compress and Archive Files” box.

The screenshot shows the File Manager interface with three buttons at the top: 'Inbound Reports', 'Upload 835s into 835Direct', and 'Archive Files'. Below the buttons is a 'File Manager' header and a 'LOG' icon. The main area displays a list of archived files under the heading 'Archived Files'. The list includes columns for file names (with checkboxes), file paths, and timestamps. The last file in the list is selected with a checkmark. A dialog box titled 'Compress and Archive Files' is open on the right, featuring a 'Filename**:' field with '.zip' as a default extension, 'Ok' and 'Cancel' buttons, and a note: '**If you do not wish to save these files to your local machine you do not have to put in a filename.' A pink arrow points to the 'Archive Files' button in the top navigation bar.

File Name	Timestamp
<input type="checkbox"/> ERN00396.ERN.835_06062014071545.83	6/6/2014 7:15:40 AM
<input type="checkbox"/> ERN00395.ERN.835_06052014071456.40	6/5/2014 7:14:46 AM
<input type="checkbox"/> RSP00394.RSP.277CA_06032014131427.09	6/3/2014 1:14:21 PM
<input type="checkbox"/> 99900393.999.999_06032014131427.09	6/3/2014 1:14:19 PM
<input type="checkbox"/> RSP00392.RSP.277CA_06032014121601.05	6/3/2014 12:15:55 PM
<input type="checkbox"/> RSP00391.RSP.277CA_06032014121601.05	6/3/2014 12:15:54 PM
<input checked="" type="checkbox"/> 99900390.999.999_06032014121601.05	6/3/2014 12:15:53 PM

Medicare Eligibility



Medicare Eligibility – Initial Check


Required fields for checking eligibility are as follows:

- **HICN** – must be entered without dashes or slashes
- **Last Name**
- **First Name** or **Date of Birth** – you don't have to enter both fields, just one or the other


Click the **Get Eligibility** button to pull results from the Common Working File. Be sure to enable popups as the report will open in a new window.

The screenshot shows a web form titled "Medicare Eligibility Inquiry". At the top, there are navigation arrows (back and forward) and a search icon. Below the title, there are input fields for "Name" and "NPI". The main section contains several input fields: "HICN/Member Id" with a red asterisk and a "Missing Report Info?" link; "Last Name" with a red asterisk; "First Name"; "Date of Birth"; "Date Type" with a dropdown menu showing "Plan Date"; "From" with the date "3/8/2012"; and "Thru" with the date "10/8/2014". At the bottom center, there is a blue button labeled "Get Eligibility".

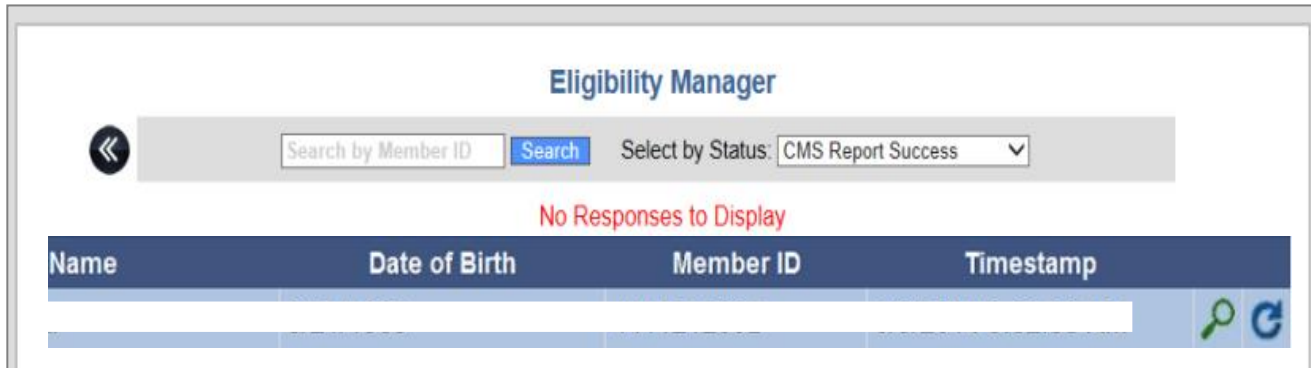
Medicare Eligibility – Eligibility Manager

Clicking  on the Eligibility screen opens the **Eligibility Manager**.

Eligibility Manager displays all patients for whom you previously checked eligibility. This allows you to run updated reports without having to re-enter all of the patients' information. You can search the list by Medicare #.

Click  to run the initial report again.

Click  to run an updated version of the report.



The screenshot shows the 'Eligibility Manager' interface. At the top, there is a title 'Eligibility Manager' and a back arrow icon. Below the title is a search bar with the text 'Search by Member ID' and a 'Search' button. To the right of the search bar is a dropdown menu labeled 'Select by Status:' with 'CMS Report Success' selected. Below the search bar, the text 'No Responses to Display' is shown in red. Below this is a table with four columns: 'Name', 'Date of Birth', 'Member ID', and 'Timestamp'. The table is currently empty. At the bottom right of the table, there are two icons: a magnifying glass and a refresh icon.