

STANDARD OPERATING PROCEDURE



STANDARD OPERATING PROCEDURE Transportation Provider

Web URL: <https://app.ft.kinetik.care/login>
Support Email: ftsupport@kinetik.care

Revised 4/20/2020

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1. PURPOSE

This SOP aims to deliver a standard procedure to access the Kinetik website by a Transportation Provider.

2. INTRODUCTION

The Kinetik platform will allow Transportation Providers to have access to an online portal where they can upload and manage their 837p files and receive 835 files.

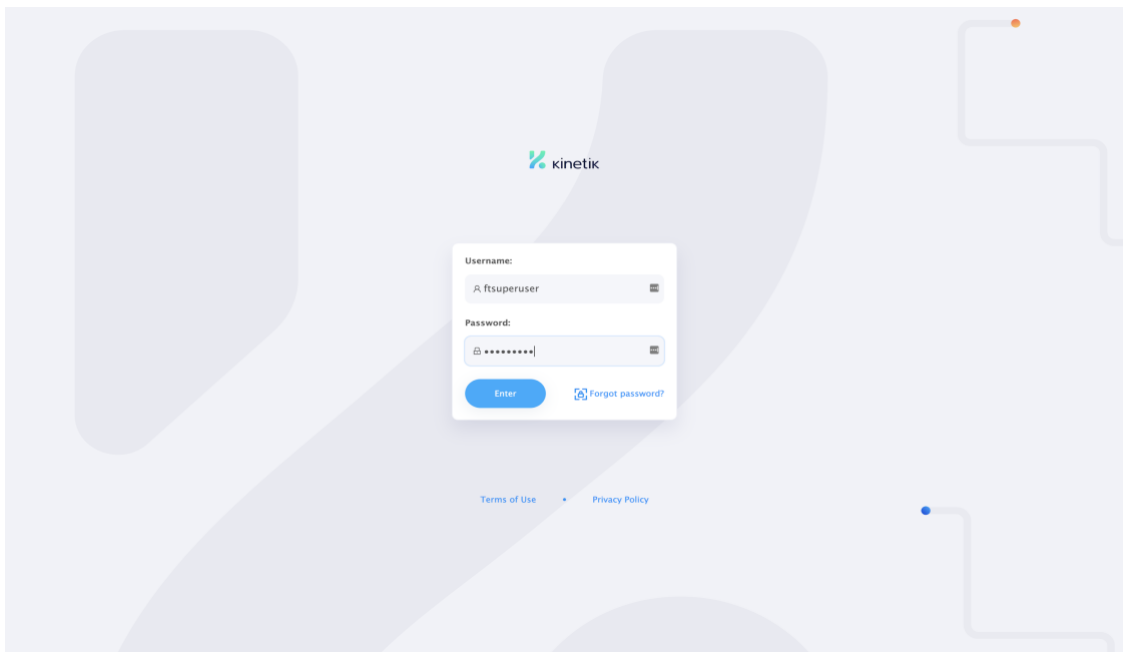
3. PROCEDURE

3.1 User Login

The main login page can be used for both Transportation Providers and First Transit Users.

To login to the Kinetik platform, the user must enter their Username and Password (Case Sensitive) and press Enter.

Usernames are created by the Administrator of the account and temporary Passwords are emailed to user to login with.



If the credentials are invalid, an alert will be shown at the top center of the screen to notify the user. If there are **5 consecutive incorrect login attempts within a 24-hour period**, the account will be locked. Locked accounts can only be unlocked by Admin users.

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3.1.1 Password Management

Passwords are set to expire every **90** days. If a user tries to log in with an expired password, an alert will appear at the top center of their screen, and they will be redirected to a new page to set a new password (case sensitive).

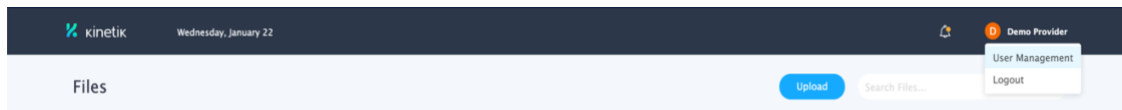
3.1.2 New Users

New users will receive credentials (username and temporary password) in a welcome email from Kinetik. When logging in with these credentials, users will be redirected to a new page to change their password.

3.1.3 Forgot Password

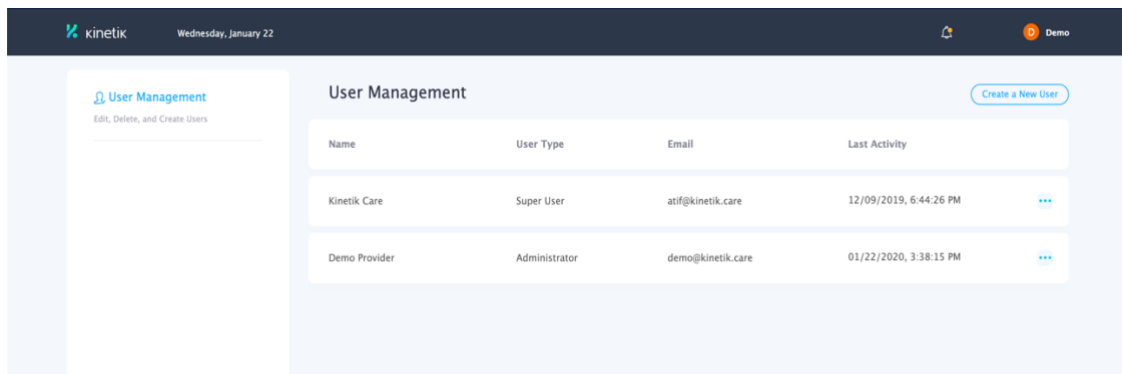
If a user forgets their password, they can click “Forgot Password” on the Login page. This will prompt them for their username and email attached to the account. The user will receive a notification that an email has been sent with a temporary password. Users can then login with the temporary password and then be redirected to a new page to set a new password.

3.2 User Management



User Management can be accessed by clicking the User Icon / Name on to the top right corner of the application. The User Management tab will only be accessible to Admin users. This option will not be visible to standard users.

3.2.1 User Management Page

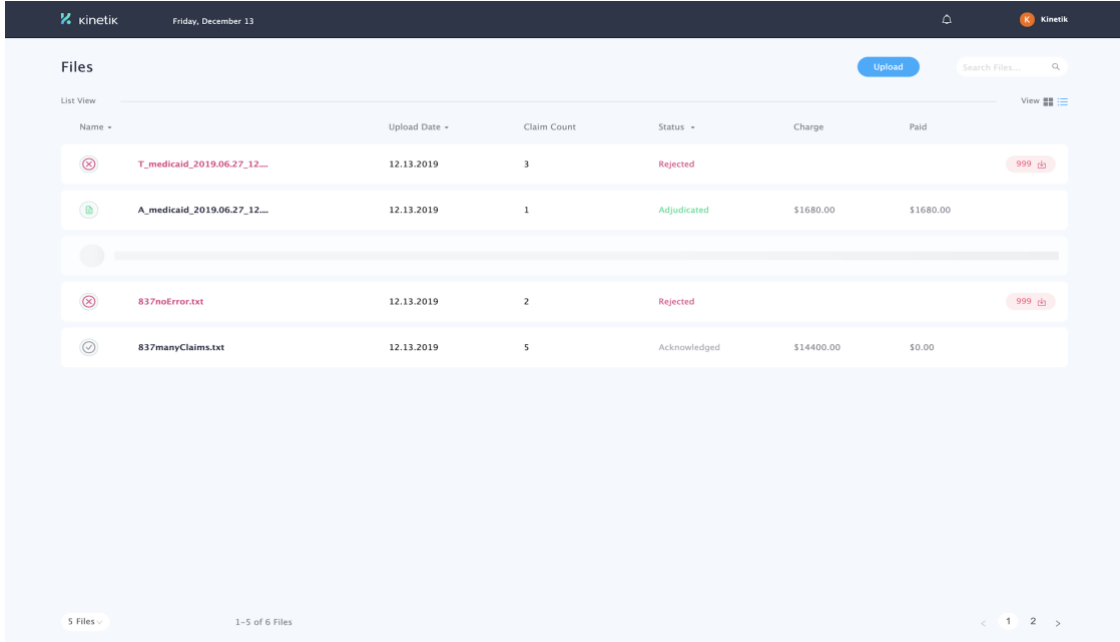


This page will list a company’s active users including their full name, user type, email, and when they were last active. Administrators can create new users with the “Create a New User” button in the top right. They are also able to edit, delete, or unlock other users by clicking the “...” button on the right side of the user.

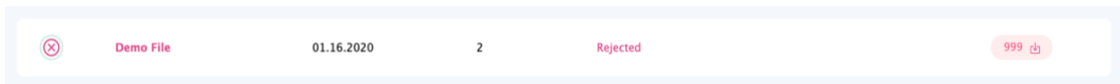
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3.3 File Page for Transportation Provider (Landing Page)

After successful login, the user will be brought to the Files page of their organization's portal. This is the first page they will see upon login.



This page will show all recent 837 files that have been uploaded by **all** users of the company. A user can view specific information about the uploaded files, including the file name, upload date, number of claims, charged amount, paid amount, and the overall status of the file.



If a 837 file is rejected during 999 validation, the rejection information and raw 999 file are accessible by clicking the red 999 button on the right side of the file card. This will show a popup with a list of segments in the 837 that have errors. See Handling



If a file is adjudicated and the ERA / 835 has been processed, the 835 can be downloaded by clicking the green 835 button on the right side of the file card.

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3.3.1 **Sorting Files**

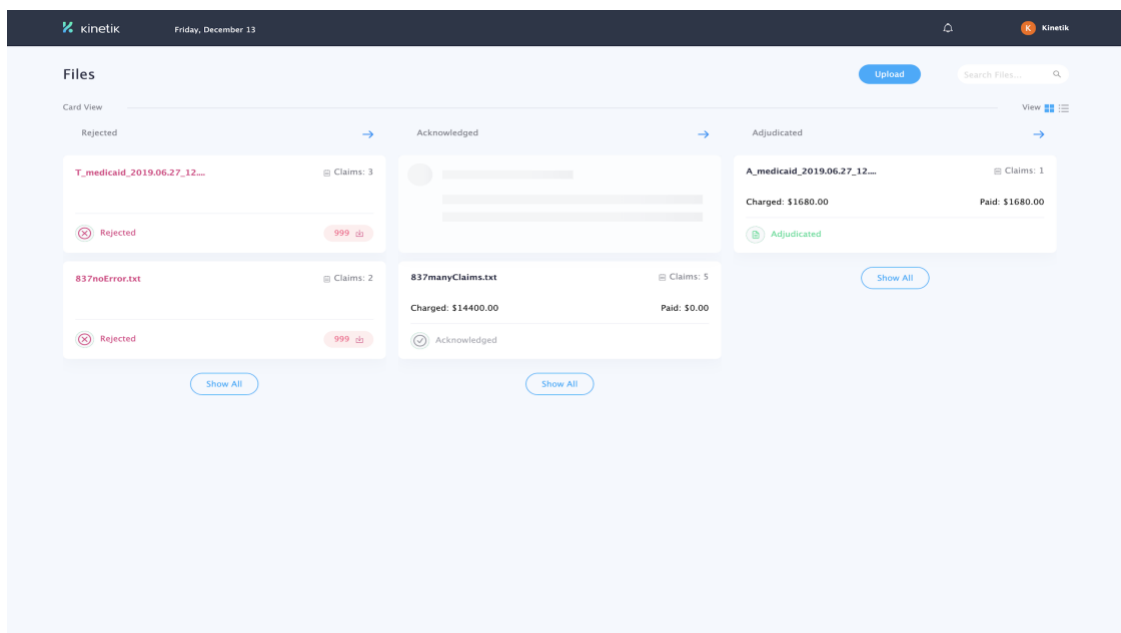
The files can be sorted in ascending and descending order by name, upload date, and status.

3.3.2 **Searching Files**

Files can be searched with the search bar in the top right corner of the page. Users can only search by the file name.

3.3.3 **Viewing Files**

There are two view options for the Files Page. By default, Files are shown in the List view, but can be toggled to the Block view. Block view contains three columns one for each status a file can be in – Acknowledged, Rejected, Adjudicated.



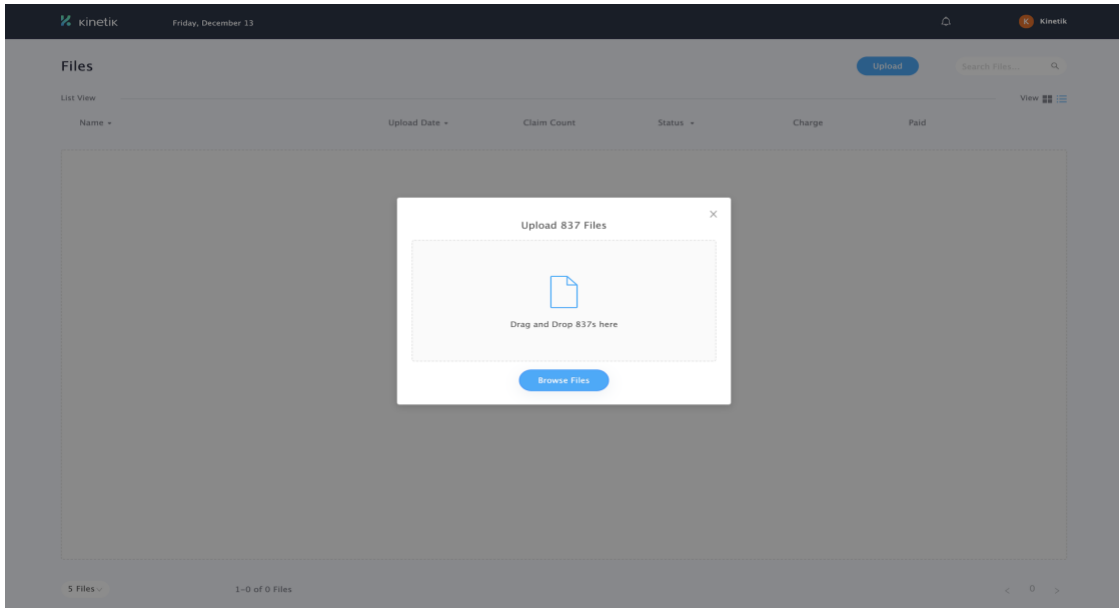
3.3.4 **File Upload**

To upload a file, click the Upload button left of the search bar. A popup will appear, prompting the user to select files for upload. Files can either be dragged and dropped, or selected from the file browser.

Supported 837 File Types:

- **.txt**
- **.x12**
- **.837**
- **.DAT**

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3.3.5 **Required Fields for 837p**

All 837p files must include the following data fields as mandated by Illinois Medicaid.

Vehicle License Plate number

Pickup Time

Drop off Time

These fields should be included in Loop 2300 – Claim Note (NTE):

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Transportation claims, emergency and non-emergency, must report specific information about the trip in the NTE 2300 Loop. The State code, Vehicle License Number, Origin Time, and Destination Time must be reported in Loop 2300 Claim Note, NTE02 element. The information contained in this field will apply to all service sections unless overridden in the 2400 Loop.

NTE01: Value "ADD"

NTE02: State or Province Code, Vehicle License Number, Origin Time, Destination Time

Example:

NTE*ADD* IL,12345678,1155,1220 and must follow this format:

- Each field must be separated with a comma.

The length for each field is listed below:

Length	Description
2	State or Province Code (Use Code source 22: States and Outlying Areas of the U.S.)
8	Vehicle License Number
4	Origin Time Time expressed in 24-hour clock time as follows: HHMM, where H = hours (00-23), M = minutes (00-59)
4	Destination Time Time expressed in 24-hour clock time as follows: HHMM, where H = hours (00-23), M = minutes (00-59)

NOTE: The State or Province Code, Origin Time and Destination Time fields **must** contain the length per field as listed above. Vehicle license number may vary from 1 to a maximum of 8 characters. If the license plate number is less than 8 characters, left justify and space fill.

3.3.6 EDI 999 Validation Check

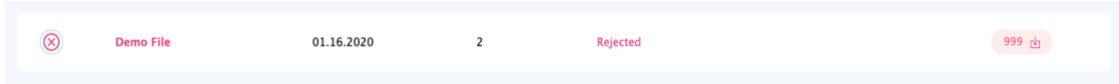
Upon successfully uploading an 837 file, the Kinetik platform will work to decrypt and analyse the contents to verify that a valid 837 has been provided. This validation process is also known as the 999 validation, and can result in the following:

1. **Acknowledged:** The 837 file contains no syntax errors and has all required data to proceed.
2. **Rejected:** The 837 file contains syntax errors and/or missing required data elements.

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3.3.7 Viewing 999 Rejection Reasons:

If an 837 file upload is rejected from the 999 validation, users can view the error messages by clicking on the red 999 button on the very right side of an 837 file item. The button will trigger a popup specifying Loop, Segment, and Element errors where applicable. The 999 text file can also be downloaded from this popup.



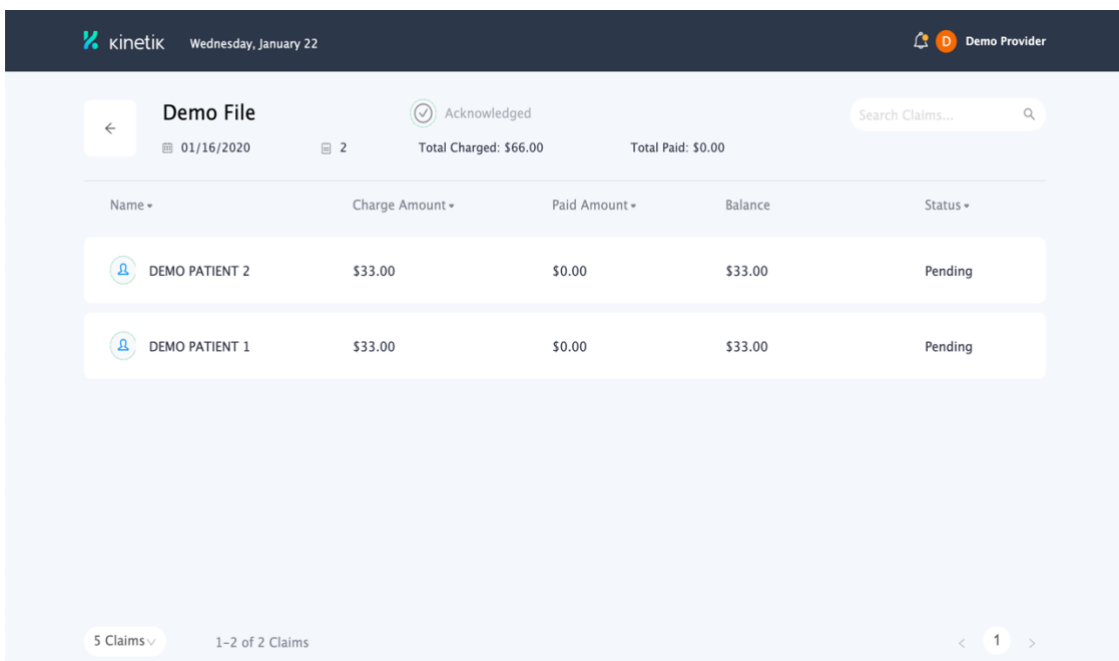
3.3.8 Handling Rejected Files

If an 837 file is rejected, a user will need to fix all errors and reupload 837 file. The file will once again go through 999 validation and check for errors. If there are no errors with the corrected file, the file will have a status of acknowledged. If there are still errors, the file will be marked rejected and require adjustments before reuploading.

3.4 Claims Page

This page displays all the claims in a specific 837 file. It can be navigated to by clicking on a file card on the Files page. The top of the page displays the file name in bold text along with date of upload, the number of claims in the entire file, the total charge, and paid amount of all claims. The overall status of a file is also shown on top.

By default, five claims will be shown with primary information including Name of Patient, Charge Amount, Paid Amount, Balance, and the Claim Status. When a new file is uploaded, all claims are created with a Pending status, indicating that the claim is waiting for adjudication. If a file has more than five claims, a user can navigate using the pagination options at the bottom of the page.

The screenshot shows the 'Claims Page' for a 'Demo File'. At the top, the Kinetik logo and date 'Wednesday, January 22' are on the left, and a 'Demo Provider' notification is on the right. The file name 'Demo File' is in bold, followed by a checkmark icon and the status 'Acknowledged'. Below this, the date '01/16/2020', the number of claims '2', 'Total Charged: \$66.00', and 'Total Paid: \$0.00' are displayed. A search bar 'Search Claims...' is on the right. A table lists the claims with columns: Name, Charge Amount, Paid Amount, Balance, and Status. Two claims are shown: 'DEMO PATIENT 2' and 'DEMO PATIENT 1', both with a charge of \$33.00 and a status of 'Pending'. At the bottom, there are pagination controls: '5 Claims', '1-2 of 2 Claims', and a page number '1' with navigation arrows.

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3.4.1 Claim Statuses

Each claim has one of three statuses:

1. **Pending:** The default status for a new claim. This claim is ready to be reviewed and adjudicated by the relevant party.
2. **Adjudicated:** Claims are marked as Adjudicated if they have been paid or denied by the relevant party. Note: Partially paid claims are also marked as adjudicated. A user can determine if a claim is partially paid by viewing the Balance column.
3. **Rejected:** Claims can be marked rejected for reasons listed below. This rejection is not the same as a 999 Validation rejection. Claims can be rejected for any of the following reasons:
 - Duplicate claim – identical service line items found in a previously uploaded claim
 - Resubmission attempted **after** claims were adjudicated
 - Contains Emergency Procedure Codes – A0429, A0427, A0433, and A0431 U3.

3.5 Claim Details Page

The screenshot displays the 'Claim Details' page for 'DEMO PATIENT 2 (023529860)'. The page header includes the Kinetik logo, the date 'Wednesday, January 22', and a 'Demo Provider' indicator. Patient information is shown at the top: 'DEMO PATIENT 2 (023529860)', 'Claim ID: 18cxk5haobnb', 'Date of Birth: 10/10/1957', 'Sex: F', 'Patient Phone: n/a', and 'Patient ID: 4ewk51emm4f'. Below this, there are three main sections: 'Pickup Address' (675 N SAINT CLAIR ST, 1091, CHICAGO, IL 60611), 'Dropoff Address' (30 W CHICAGO AVE, 1526, CHICAGO, IL 60654), and 'Claim Details' (Service Date: 12/01/2019, Original Claim Reference: 00, Submission Count: 1, Diagnosis Codes: R079, Total Charge: \$33.00, Notes: IL,19533PT,1758,1807, Total Paid: \$0.00, Balance: \$33.00). A 'Services' table lists two items: A0130 (HR, 1 unit, \$30.00) and A0425 (HR, 1 unit, \$3.00). An 'Events' section shows a 'Claim Rejected - duplicate service line items detected' event on 'Last Thursday at 5:17 PM'.

This page shows detailed information about a specific claim. Users can navigate to this page by clicking on a claim item listed on the Claims Page. The top of the page displays the patient name and insurance id, along with their birth date, sex, and phone number.

All relevant claim details are also displayed on the page including: Pickup Address, Dropoff Address, Diagnosis (ICD-10) Codes, Procedure Codes, Modifiers, Units, Charge, and Events pertaining to the claim.

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3.6 Resubmitting a Claim

Claims can be resubmitted via an 837 file using the Original Claim Reference Number and a Frequency Code of 7. During 837 generation, the Original Claim Reference Number of the previous submission must be supplied. This number can be found on the Claim Details Page under the field name "Claim ID".

3.6.1 Common Error When Resubmitting a Claim

Claims will be marked with a status of Rejection if they are resubmitted without and Original Claim Reference Number and Claim Frequency Code 7. This rejection is due to the system recognizing the claim as a duplicate since no Original Claim Reference Number is supplied.

SOP Number 0002

SOP Title Kinetik Portal Access for Transportation Providers

	NAME	TITLE	SIGNATURE	DATE
Author	Atif Hussain		AH	4.20.2020
Reviewer				
Authoriser				

Effective Date:	4.20.2020
Review Date:	4.20.2020

CHANGE HISTORY

SOP no.	Effective Date	Significant Changes	Previous SOP no.
0002	04.20.2020	Added 'Required Fields for 837p' section detailing requirement of Vehicle Plate Number, Pickup Time, Drop Off Time.	