Real-Time Transactions

Office allows you to perform a number of real-time transactions:

- Check a patient’s eligibility
- Check the status of a claim
- Request new referrals, prior authorizations, or precertifications
- Check the status of referrals, prior authorizations, or precertifications
- Submit multiple real-time transactions in a batch
- Find a provider within a payer’s network

The process for each transaction is similar:

1. Select the transaction type from the Office main menu.
2. Select a payer.
3. Select a search method.
4. Complete the required fields. They are marked with a red asterisk (*).
5. Click Send to Payer.

 Transaction Example: Check Eligibility

1. Select Eligibility from the Office main menu.

2. Select a payer and search method from the drop-down lists in Step 1 and Step 2.

3. Complete the required (*) fields in Step 3.
   Note: Required fields will vary by payer.

4. Click Send to Payer. You will receive an immediate response. You can print the response or save the response to a batch.

Manage Users and Settings

Manage users and settings in Office by selecting the Setup tab from the main menu. You can create users, change passwords, manage favorite lists, enroll with a payer, store NPI and Legacy IDs, etc.

Support

Office provides you with support in the form of online training, user guides, FAQs, and “24/7 Online Support.” Find all of these support options on the Office home page under the Customer Support heading. Access context-sensitive help pages by clicking the Help icon ( ) at the top right of each page.