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# PROCESSING AND SUBMITTING SECONDARY CLAIMS

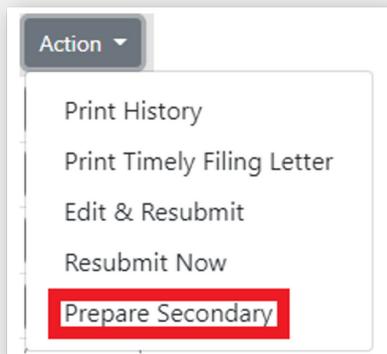


**Apex** *EDI*®  
*Helping doctors focus on healing*

# OVERVIEW

With the Secondary Claim Tool, you can create a secondary claim for any claim that has been sent to a payer.

Once you have subscribed to the tool and enabled it for your Apex EDI instance, you will see the "Prepare Secondary" option in the "Action" drop-down menu associated with each claim on the "Claim Status" tab.



If Apex receives electronic EOBs, then the primary EOB can be matched to the primary claim. Apex is then able to utilize data provided on the primary claim and the primary EOB, including primary paid amounts, adjustment amounts, adjustment reason codes, etc., to auto-populate as much of the secondary claim as possible.

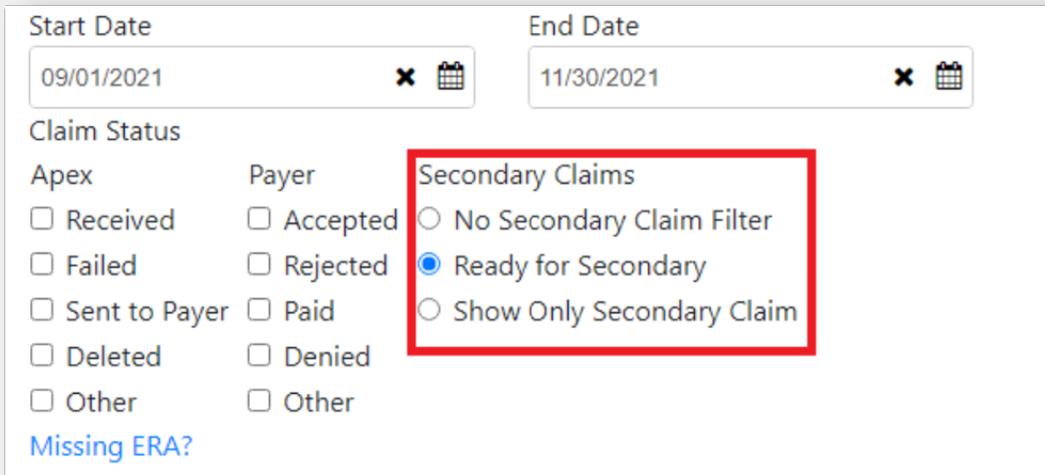
In the ideal case, the entire secondary claim can be generated without any manual additions, you only need to verify the data before submitting the secondary claim and can create a secondary claim in as little as 30-seconds in the ideal case.

If you don't receive EOBs from Apex, the secondary claim tool still allows you to create a secondary claim quickly and easily. The tool will walk you through all the required fields and allows you to manually enter any missing information (information from the primary claim is still utilized where possible).

Once completed, the secondary claim is sent to the secondary payer and the secondary claim becomes part of the primary claim's history and is displayed accordingly. You can then search for secondary claims or claims that are ready to have a secondary claim created. Claims that were created using the tool are identified as secondary with the small "two-finger" icon:

	Patient	Submitted Date ▼	Service Date	Amount	Payer
 [+]	████████████████████	11/30/2021	10/14/2021	\$177.98	Advantage Health Solutions

Under the “Advanced Search” feature, you will find new search options specific to secondary claims:



Start Date: 09/01/2021

End Date: 11/30/2021

Claim Status

Apex	Payer	Secondary Claims
<input type="checkbox"/> Received	<input type="checkbox"/> Accepted	<input type="radio"/> No Secondary Claim Filter
<input type="checkbox"/> Failed	<input type="checkbox"/> Rejected	<input checked="" type="radio"/> Ready for Secondary
<input type="checkbox"/> Sent to Payer	<input type="checkbox"/> Paid	<input type="radio"/> Show Only Secondary Claim
<input type="checkbox"/> Deleted	<input type="checkbox"/> Denied	
<input type="checkbox"/> Other	<input type="checkbox"/> Other	

[Missing ERA?](#)

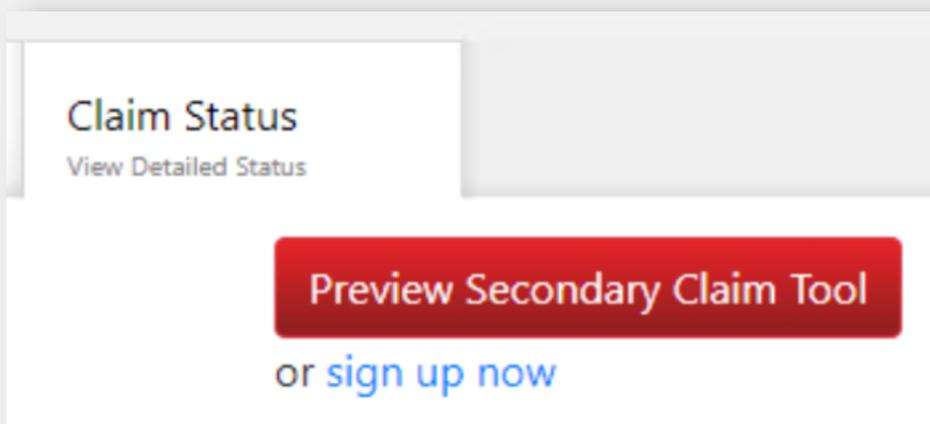
No Secondary Claim Filter” is the default selection and means that secondary claims will not be filtered in any way.

A “Ready for Secondary” claim is one that has an electronic EOB associated with it, and the primary claim has “other insurance” information on it.

When “Show Only Secondary Claim” is selected then any claim that was submitted via the tool and is therefore tagged as a secondary claim will be returned in the result.

## SIGNING UP

You will be notified about the secondary claim tool on your Apex website on the “Claim Status” tab. The tool notice allows you to go through a guided tutorial and/or sign up for the tool yourself.



The “Preview Secondary Claim Tool” button routes you to a page which provides an overview of the features that will be enabled along with the option to sign up or go through a tour of the tool.

When the “Tour Secondary Claims” button is clicked the guided tour starts automatically.

## Claim Status Secondary Claim Preview

**Start Date**  
07/07/2018

**End Date**  
08/07/2018

**Claim Status**

Apex	Payer	Secondary Claims
<input type="checkbox"/> Received	<input type="checkbox"/> Accepted	<input checked="" type="radio"/> No Secondary Claim Filter
<input type="checkbox"/> Failed	<input type="checkbox"/> Rejected	<input type="radio"/> Ready for Secondary
<input type="checkbox"/> Sent to Payer	<input type="checkbox"/> Paid	<input type="radio"/> Show Only Secondary Claim
<input type="checkbox"/> Deleted	<input type="checkbox"/> Denied	
<input type="checkbox"/> Other	<input type="checkbox"/> Other	

[Simple Search](#)

When you add Apex's Secondary Claim tool to your account, the benefit of being able to search for claims that are ready for secondary claim processing or have already been processed as secondary claims will be added to your search options.

**Actions**

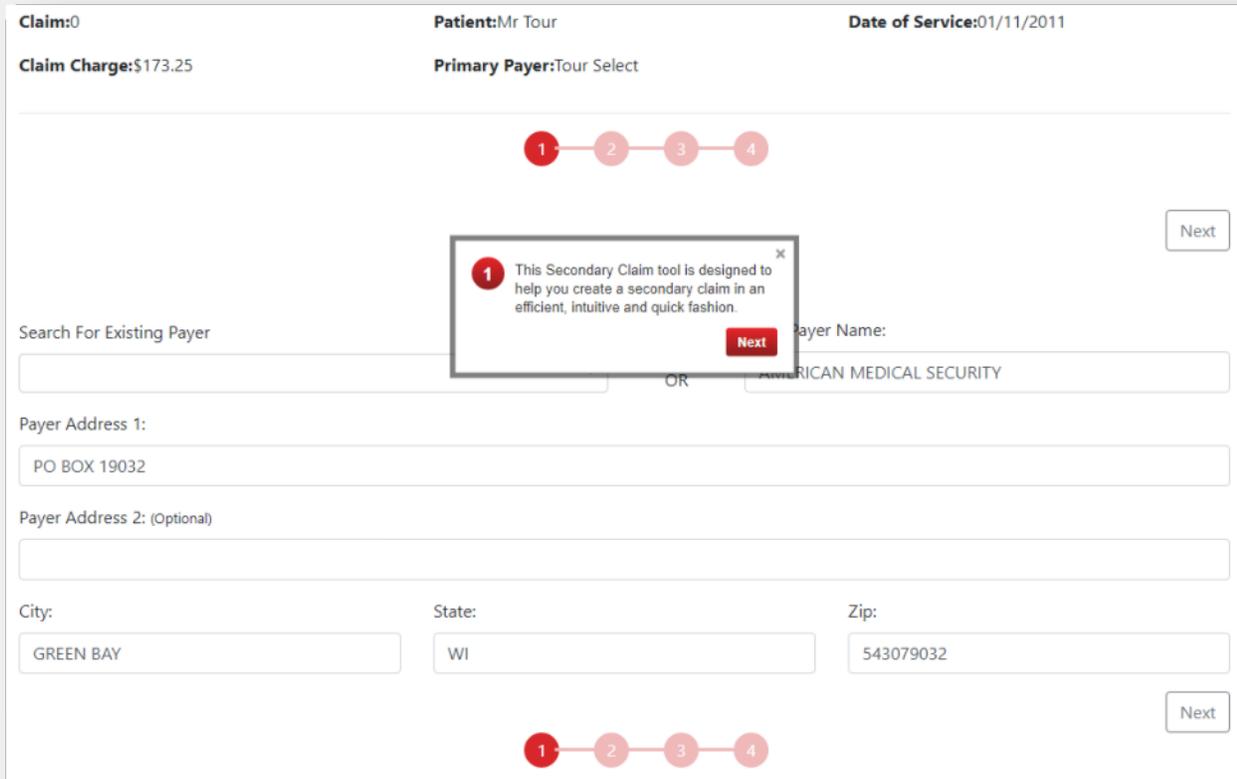
Action ▾

- Print History
- Edit & Resubmit
- Resubmit Now
- Prepare Secondary

When the Secondary Claim tool is added to your account, you will access the tool for any claim that has been sent to a payer by clicking on “Prepare Secondary” in the “Action” drop down list.

[Tour Secondary Claims](#)  
or [sign up now](#)

At the end of the tour, you are again given the option to sign up or return to the “claim status” tab where you started.



The screenshot shows the 'Secondary Claims Tool' interface. At the top, it displays 'Claim:0', 'Patient:Mr Tour', and 'Date of Service:01/11/2011'. Below this, 'Claim Charge:\$173.25' and 'Primary Payer:Tour Select' are shown. A progress indicator at the top center consists of four red circles numbered 1, 2, 3, and 4, with circle 1 being the largest and most prominent. A tooltip box is overlaid on the interface, containing a red circle with the number 1 and the text: 'This Secondary Claim tool is designed to help you create a secondary claim in an efficient, intuitive and quick fashion.' The tooltip has a close button (X) in the top right corner and a 'Next' button at the bottom center. The main form includes a 'Search For Existing Payer' field with a dropdown menu showing 'OR' and 'AMERICAN MEDICAL SECURITY'. Below this are fields for 'Payer Name', 'Payer Address 1:' (containing 'PO BOX 19032'), 'Payer Address 2: (Optional)', 'City:' (containing 'GREEN BAY'), 'State:' (containing 'WI'), and 'Zip:' (containing '543079032'). There are 'Next' buttons on the right side of the form, one above and one below the progress indicator.

At the end of the tour, you are again given the option to sign up or return to the “claim status” tab where you started.

When you sign up, you are taken to a page that asks for an “e-signature”. Submitting an e-signature commits you to any subscription fees associated with the Secondary Claims Tool. Clicking the "Sign Up" button will enable the tool, and the feature will be available at your next log-in. So, make sure to reload the site in order to start using this tool.

## Sign up for Secondary Claims

By typing your name in the box you acknowledge that you have authority to add services to your Apex account and you have read and agree to the terms of service below.

Sign your name here

Sign Up

As terms of the secondary claim tool service, you agree to add the secondary claim tool and features to your account for the price of \$5.00 per month. You will have access to the secondary claim tool on all claims associated with your Apex client ID that have been processed by Apex to an insurance company. The secondary claim tool will be added to your account as long as your account remains in good standing. You may cancel this service at any time by contacting your Apex account manager. In case of cancellation, previously incurred and/or paid fees will not be refunded or prorated. Apex cannot guarantee payment of any claim. Claim payment is dependent on payer and subscriber factors that are outside of Apex's control.