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Need axiUm to integrate with FastAttach™, an electronic attachment solution by NEA (National Electronic Attachment, Inc.). Allowing axiUm to pre-populate insurance information saves you from manually entering this.

Now you can purchase an optional module that lets axiUm integrate with FastAttach™ for dental treatments. This lets axiUm send a batch of claims requiring attachments to FastAttach™, and then auto-insert the NEA# returned from FastAttach™ into the claim record.

Notes:

- FastAttach™ is an optional module you can purchase at an additional cost. For information, contact axiUm Sales.

- You must create an account with NEA FastAttach™. axiUm Sales will provide you with the required information.

- After you purchase FastAttach™, axiUm Support will enable this module so you can complete the axiUm setup.

General setup instructions:

- Install FastAttach™
- Setting up FastAttach™
- Setting up axiUm

The following sections outline the above instructions in detail.
Setting up FastAttach™

Installing FastAttach™

To Install FastAttach™:


2. Select the Install tab.

3. Select the Dental sub-tab.

4. Install FastAttach™ by clicking the download button on the website and following the instructions on their setup screen.
5. When the installation is complete, go to your Desktop and click (FastAttach). FastAttach™ launches its application.

![FastAttach™ login window]

6. Click the Exit button. Opening and closing the application lets FastAttach™ identify your workstation ID.

You have successfully installed FastAttach™. Next you must set up the FastAttach™ application.

**Setting up FastAttach™**

To set up FastAttach™:

1. From your Desktop, click (FastAttach). This launches the FastAttach™ application.

2. Enter the fields using the information provided by FastAttach™. When you complete the FastAttach™ registration process, they will send you this information.

3. Click the Login button. FastAttach™ logs you onto the application.
4. Click the Payor Information button. FastAttach™ displays the Payor Information page.

5. For each payor that your institution uses, make note of their Master Id. You will need this information to set up axiUm.

6. Click (close). FastAttach™ closes its application.

You have successfully set up FastAttach™. Next, you must set up axiUm.

**Setting up axiUm**

Setting up axiUm requires you to set up the following:

- axiUm station options
- Your dental practice
- Insurance companies
- Patients

Note: The FastAttach™ module must be enabled by axiUm Support before you can complete the above steps.

The following sections provide detailed instructions for the above setup.

**Setting up axiUm Station Options (for test purposes only)**

To set up your axiUm station options *(for testing)*:

1. Launch axiUm.
2. Open the Station Options window
   Go to Maintenance window - System tab - Station Options icon.
3. Go to EDI Claims section - NEA section - NEASerialNumber item (new).
4. Click (Station Option Update).
   axiUm displays the Station Option Update window.
5. From the list view, select your workstation.
6. In the Value text box, enter axiUm.
7. Click the Save button.  
   axiUm saves the new value for the selected workstation.

8. Repeat steps 5 - 7 for all workstations that will be using NEA during the test period.

9. Click (close).  
   axiUm closes the Station Option Update window and returns to the Station Options window.

10. Click (close).  
    axiUm closes the Options window and returns to the Maintenance window.

You have successfully set up your station options. Next, we will set up your practice.

Setting up Your Practice

To set up your practice:

1. Launch axiUm.

2. Open the Practice Options window.

   Go to Maintenance window - Office tab - Practices icon - Practices window -  (Practice Options).

3. Go to the Transactions Options section, and in the NEA Facility field (new), enter the Facility ID provided by FastAttach™.
4. Click the OK button.
   axiUm saves the changes, closes the Practice Options window, and returns to the Practices window.

5. Click (close).
   axiUm closes the Practices window and returns to the Maintenance window.

You have successfully set up your practice. Next, we will set up the insurance company.

**Setting up Insurance Companies**

To set up an insurance company:

1. Open the Insurance Company window. For our example, we will select the insurance company BCTX - Blue Cross Blue Shield of Texas.
   Go to Maintenance window - Insurance tab - Insurance Companies icon - Insurance Companies List window - run a search - highlight a record from the list view - (Edit Record).

Note: If the insurance company is already set up to submit electronic claims, you can skip steps 2, 3, and 5.

2. Go to the Claims section and from the Claim Form drop-down field, select any ADA-type claim format. For our example, we will select the ADA06 option.
3. Go to the EDI section’s EDI Version drop-down field and select either the X12N5010 Dental option or the X12N4010 Dental option.

4. Click the EDI Settings button. axiUm displays the EDI Settings window.

5. Go to the EDI Settings sections, and from the Transactions drop-down field, select either the Claims only option or the Claims/Preauths option.

6. Go to the EDI Numbers section, and in the NEA FastAttach™ field, enter the MasterID number obtained from the FastAttach™ module’s Payor Information section. In our example, this is 034004.
7. Click the OK button.
   axiUm saves the changes, closes the EDI Settings window, and returns to the Insurance Company window.

8. Click (close).
   axiUm closes the Insurance Company window and returns to the Maintenance window.

You must complete the above setup for each insurance carrier that electronic attachments will be sent.

Next, we will set up a patient.

**Setting up Patients**

The following setup is required only if you have no patients already set up with an insurance company containing a NEA FastAttach™ ID.

To set up a patient:

1. Open the Patient Info window. For our example, we will select the patient Jane Doe.

2. Click the Insurance tab.

3. Attach a policy associated to the insurance company set up earlier. For our example, we will add a benefit plan coverage from the insurance company Blue Cross Blue Shield of Texas.
4. Click the Save button. 
   axiUm saves the entries.

5. Click the Close button. 
   axiUm closes the Patient Info window and returns to the Rolodex window.

You have successfully set up a patient.

This completes the setup process. You are now ready to begin using axiUm with FastAttach™.
Using FastAttach™

To use FastAttach™:

1. Open the EDI Claims window.

2. Select Dental 5010 and look for the claim you just created.

3. From the list view, right-click to display a list of options. axiUm displays the following new right-click options:

   - **Requires Attachment**: Selecting this right-click option marks the selected claims/treatments as requiring an attachment. For the selected record, the Attach column displays Required.

   - **Cancel Attachment**: Selecting this right-click option updates the selected claims/treatments as requiring no attachment. For the selected record, axiUm clears the Required indicator in the Attach column.

   - **Send For Attachments**: Selecting this right-click option exports a list of claims to the NEA FastAttach™ software (via their API) and marks them as Pending.

   - **Update Attachment Status**: Selecting this right-click option imports the status of selected claims/treatments that have been exported (i.e. marked as Pending) from the FastAttach™ software (via their API) and either marks them as Attached (if completed), or “ “ (if deleted).
- **Update All Attachments**: Selecting this right-click option imports the status of all exported claims (i.e. those marked as Pending).

4. Highlight the line with the treatment requiring the attachment and select one of the following right-click options:

- Requires Attachment: Selecting this right-click option indicates that this treatment requires an attachment.

- Send for Attachments: Selecting this right-click option sends the treatment to FastAttach™ in one step.

For our example, we will select the Send for Attachments right-click option. The status in the EDI window’s Attach column changes to Pending status.

5. Launch FastAttach™.

Typically, you will do this by going to your desktop and clicking (FastAttach).
6. Enter the credentials to log into FastAttach™. The patient shows up in FastAttach™.

7. Add an attachment.
   You can do this by highlighting the line and clicking the Edit button or double-clicking the line to open the Data Entry window. There are multiple methods of adding attachments. For our example, we will use the screen-capturing method.
8. Click the Screen Capture button. FastAttach™ displays the **NEA: Screen Capture** window.

9. Open the radiograph or other image to be attached to the claim.

10. Click the Draw Rectangle button.

11. Using the red cross-indicator, click and drag over the image to capture the image.

12. Enter the fields and options. For example:
   - **Orientation:** “The left side is the patient's right side” option.
   - **Date Taken:** In this field, enter a date (e.g. today’s date).
   - **Select Type:** From the drop-down field select an image type (e.g. Bitewing).
13. Click the Next button. FastAttach™ saves the entry and returns to the Data Entry page.
14. Click the Save button. FastAttach™ saves the record. The list view’s Status column displays the status Ready to Send.

If an error window displays the message, “A payor reference number is required for this attachment”, enter the reference code provided from the EOB from the insurance company.

![Error Window]

Note: If NEA FastAttach™ has indicated on their end that the associated insurance company requires a reference number, the Yes option is selected by default and the section is disabled.

FastAttach™ returns to the Main screen.

The Status column changes to the status Ready to Send.

![Main Screen]

Note: For instructional videos on using additional FastAttach™ features, refer to the NEA FastAttach™ website.
15. Return to the axiUm application’s EDI Claims module.

16. Go to the EDI Claims window’s Unsubmitted Procedures tab.

17. From the list view, right-click to display a list of options.

18. Select the Update Attachment Status option.

The Attach column displays the text Attached.

19. View the details for the NEA FastAttach™ information to be sent with the claim.
   You can do this by going to the list view, right-clicking to display a list of options, and selecting the Edit Details option.
axiUm displays the ADA Insurance Claim, Comment- NEA #, and the Attachment Reference # field displays the NEA number.

Note the following requirements:

- Subscriber # should be at least four characters long.
- Dental claims only
- US only
- Limited to one NEA# per claim.
- If axiUm displays the message, “Invalid parameter: primary payor, Message: invalid payor” you must check insurance details (in the EDI Settings window’s NEA FastAttach field, or contact FastAttach™).
- Date of birth is mandatory to receive attachments from FastAttach™.
- Billing Providers must have a license #, tax id, and NPI