



# IQVIA COPAY 837P EDI PROVIDER REGISTRATION

## Companion Guide

This Companion Guide is designed to streamline the 837P EDI provider registration and management for participating providers in IQVIA copay assistance programs.

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# **IQVIA COPAY 837P EDI Provider Registration Companion Guide**

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## DISCLOSURE

The content in this document provides additional information for submitters to assist in their implementation of submitting 837P EDI Claims to IQVIA for adjudication.

The information below are instructions on how to register for the IQVIA EDI system for medical claim submission for select IQVIA copay Programs.

**\*\*Please Note, IQVIA is currently only accepting Professional EDI medical claims in the 837P format. Claims submitted in any other format will not be processed at this time.\*\***

## KEY INFORMATION FOR GETTING REGISTERED FOR EDI

### STEP 1: IQVIA PAYER NAME AND PAYER ID

Please check for and use the following Payer ID and Payer Name when submitting claims:

- Payer Name: **IQVIA**
- Payer ID: **15060**

### STEP 2: SETTING UP YOUR PRACTICE ACCOUNT WITH IQVIA

There are two methods that may be available to providers for submitting and registering their practice account information with IQVIA:

- First, using an IQVIA HCP Portal for the specified Copay Program
  - Providers will provide identifiers and their practice demographic information.
  - Providers will be able to select the payment vehicle of their choice, when applicable. (Check, EFT, etc.)
  - If EFT is an option, providers will have access to the IQVIA payment partner (Transcard) via link from IQVIA HCP Portal and provide payment information.
- Second, if provider registration is not available via an IQVIA HCP Portal, then registration via an EFT Microsite may be available.
  - IQVIA Program Support Group (PSG) would need to be notified of a provider's desire to submit their copay claim via EDI.
  - The IQVIA PSG would register the providers practice information and a user's email address.
  - Once the email address is entered, an email is sent out with a unique link to the IQVIA EFT Microsite site.
  - Once the provider has set their password and logged in for the first time, then can then set up their banking information for EFT payments and being submitting EDI claims.



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## STEP 3: 837P EDI CLAIM ADDITIONAL SUBMISSION INSTRUCTIONS

Once you have received the primary Explanation of Benefits (EOB/ERA) from the patient's insurance provider, please follow the steps listed below for submitting claims to the Copay Assistance Program:

1. Within your billing or clearinghouse software, search for 15060 (IQVIA) as an available payer.
  - a. If 15060 is an available payer, you may begin submitting electronic claims transactions (837P files).
  - b. If 15060 is not available, please work directly with your billing and/or clearing house software vendor to have 15060 added as an available payer.
    - i. ***\*\*Please take note, you may be able to have 15060 easily added into your billing software, however, you will still need to contact your claims clearing house vendor to ensure they are registered/contracted to transmit your claims to the IQVIA payer ID 15060. If your clearinghouse does need to have the IQVIA payer and ID added, depending on the providers clearinghouse, it may take upwards of a few weeks to complete. \*\****
2. After confirming that 15060 is an available payer within your software, please add the specified IQVIA Co-Pay Program to your patient's insurance profile as a secondary or tertiary payer. Make sure to include the payer ID (15060), Copay Card Group Number and Copay Card ID as shown on the copay card. Claims submitted without this information will be rejected automatically.
3. Request that your practice management software vendor accept electronic remittance advice (ERA) (835) transactions from 15060.
4. Depending on the prescriber's billing software set up, they may use a separate clearing house, in which case, the billing software creates an electronic batch file of multiple claims and submits the batches to the clearing house at specific designated times throughout the day.
5. The clearing house will transmit the claims out to the payers (i.e. IQVIA) and a response report is generated showing the status of the claims - accepted for adjudication, rejected by payer, or rejected at the claim level.

Once your practice is registered with IQVIA and the above steps have been cleared, you will need to register with IQVIA's clearinghouse to receive the 835 (ERA) reports. Below are the steps and screenshots to register directly with the SDS Smart Data Solutions Provider Portal.

## STEP 4: ENROLLING WITH SMART DATA SOLUTIONS (SDS) TO RECEIVE 835 ELECTRONIC REMITTANCE ADVICE (ERA)

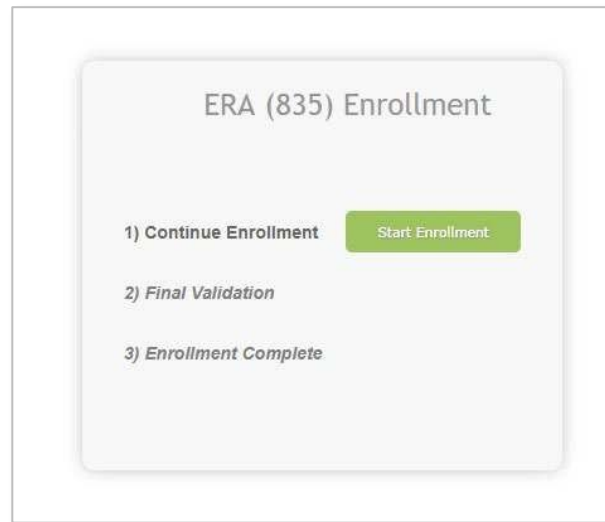
- Go to [Home | Smart Data Solutions \(sdata.us\)](https://sdata.us)
- At the top, right of that page, select Provider Portal.
  - New User – Select Register.
  - Fill in the requested information.
- Once the form has been filled out, providers will need to select how they want the activation code to be delivered.
  - Phone – 1 Business Day.
  - Fax – 1 Hour.
  - Mail – 3 to 7 Business Days.



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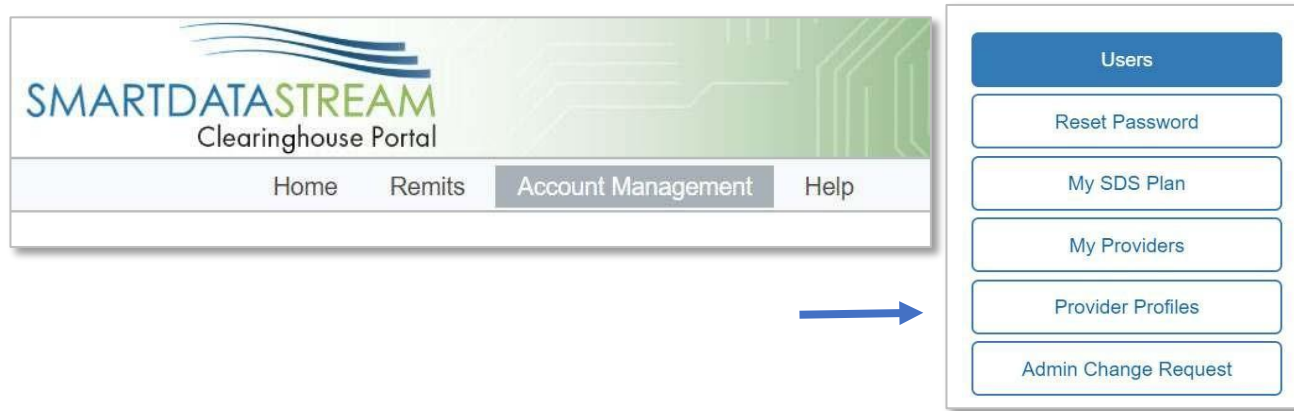
- Once the selection of the activation code delivery has been selected, providers will get a pop up informing them of the timeframe for the activation code delivery and an email detailing the next steps.
- Once the provider has their activation code, they will need to finalize their SDS account.
  - To finalize their account, the provider will need to go here: <https://quickclaim.smart-data-solutions.com/quickclaim/servlet/quickclaim/template/ClearingHouse%2COpenEnrollmentAccountVerification.vm>, this link is sent to the provider in an email
  - The provider will need to enter the exact information they did during registration to verify their account and have it created.
  - Next, they will need their activation/verification code sent via phone, fax, or mail.
  - They will set up a password.
  - Lastly, they will be given their login name.
- Once registration is successfully completed and you've logged in for the first time, you should be prompted to start your ERA enrollment.
- Follow these next steps:

After you've logged in and changed your password, you should be immediately prompted to start your ERA enrollment.



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If the above screen does not automatically appear you can select Account Management at the top bar. Then select Provider Profiles.



OR

Select Remits at the top bar then Manage Enrollments.



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The next step is to complete the enrollment form. Please take note of the following:

- \*Profile Name will not affect your ERAs and is only for labeling enrollments.
- \*Don't forget to verify your Tax ID.
- \*NPI is not required for your ERA enrollment. If left blank, you will receive ERAs for all NPIs associated with the Tax ID you enroll.
- \*Trading Partner ID is not required if you do not have one.
- \*Fax may be left blank if unavailable.

### Profile

Profile Nickname \_\_\_\_\_

### Provider Information

\* Name  
Test Provider T1000 \_\_\_\_\_

Doing Business As (DBA) \_\_\_\_\_

\* Address Line 1  
\_\_\_\_\_

Address Line 2  
\_\_\_\_\_

### Provider Identifiers Information

* Tax Identification Number (TIN) ☺ _____	* Verify TIN: _____
National Provider Identifier (NPI) _____	Verify NPI: _____
Trading Partner ID ☺ _____	

### Provider Contact Information

* Last Name test _____	* First Name test _____
* Contact Phone (651) 555-5555 x55555 _____	
Contact Fax _____	



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Under Payer Selection select “or select individual payers” You will then see the screen below:

The screenshot shows a 'Select Payers' window with the following elements:

- Header: Select Payers
- Instruction: Click on the following alphabets to search by payer name.
- Alphabet buttons: All (selected), A, B, C, D, E, F, G, H, I, J, K, L, M, N, O, P, Q, R, S, T, U, V, W, X, Y, Z
- Display options: Show 10 entries, Search: [input field]
- Table with columns: Select Payer, Payer Name, Payer ID
- Table content (rows 1-10):

Select Payer	Payer Name	Payer ID
3	3P ADMIN	20413
A	All Payers	ALL
	ACTIVA BENEFIT SERVICES LLC	38254
	Administrative Concepts, Inc	22384
	American Family Insurance	56071
	AMERICAN REPUBLIC INSURANCE COMPANY	42011
	AMPS	21825
	AMPS - CX	25667
	AMPS America	66775
	ARISE HEALTH PLAN	ARISE
- Footer: Showing 1 to 10 of 41 entries, Previous 1 2 3 4 5 Next, Save Payers button

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Select Clearinghouse.


Payer Selection  
[...or select individual payers](#)

Payer Name	Payer ID	Clearinghouse Name	Actions
ACTIVA BENEFIT SERVICES LLC	38254	Ability	Apply All ×
Administrative Concepts, Inc	22384	SDS Enrollment Portal	Apply All ×
American Family Insurance	56071	SDS Enrollment Portal	Apply All ×
AMERICAN REPUBLIC INSURANCE COMPANY	42011	SDS Enrollment Portal	Apply All ×
AMPS	21825	SDS Enrollment Portal	Apply All ×

Select “Apply All” to the right of the Clearinghouse Name and you will see the following result.

Payer Selection  
[...or select individual payers](#)

Payer Name	Payer ID	Clearinghouse Name	Actions
ACTIVA BENEFIT SERVICES LLC	38254	Ability	Apply All ×
Administrative Concepts, Inc	22384	Ability	Apply All ×
American Family Insurance	56071	Ability	Apply All ×
AMERICAN REPUBLIC INSURANCE COMPANY	42011	Ability	Apply All ×
AMPS	21825	Ability	Apply All ×




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The form will automatically have New Enrollment selected. If you click Save Progress and then come back to it, it will say Change Enrollment.

Type your name for the signature.


For the effective date, the soonest date available will be three days after the submission date. Any payments you receive after that submission date will have a corresponding ERA sent to your account.

### Submission Information


Reason for SUBMISSION 

New Enrollment  
 Change Enrollment  
 Cancel Enrollment

### Authorized Signature

\* Signature  \_\_\_\_\_

Submission Date  
2019-08-27 \_\_\_\_\_

\* Requested ERA Effective Date  \_\_\_\_\_

**SAVE PROGRESS**

**SUBMIT**

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After you click Submit it will redirect you to a page that looks like this. If you see this page, you have successfully submitted your ERA enrollment.

# Account Management

This page is for maintaining account wide preferences such as viewing or re-issuing your API key, or managing payment methods.

The screenshot displays the 'Account Management' interface. On the left is a sidebar with four buttons: 'Users', 'Reset Password', 'Provider Profiles' (highlighted in blue), and 'Admin Change Request'. The main area is titled 'Provider Profiles' and contains a card for a profile named 'Test 111111111'. The card shows the current status as 'Complete' and includes buttons for 'Show Details', 'Delete Provider Profile', and 'Edit/Review'. Below the card is a green button labeled 'Add New Provider Profile'.

- Lastly, for any help or assistance, you can select help on the provider portal and then select Smart Data Stream Guide.
  - Providers can also contact Smart Data Solutions at 855-297-4436 or via email at [stream.support@sdata.us](mailto:stream.support@sdata.us)

Thank you,

IQVIA PSS Affordability Team