

ITRANS Claim Director

INSTALLATION AND USER'S GUIDE



www.Dentrix.com | 1-800-781-5230

ITRANS Claim Director Installation and User's Guide

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Introduction to ITRANS Claim Director

Using Dentrix, you can send electronic claims over the Internet using ITRANS Claim Director. This guide includes information about sending electronic claims and how to install the necessary software.

The ITRANS Claim Service sends dental claims to insurance carriers using your Internet connection. To maintain the privacy and security of patient information when electronic claims are transferred, ITRANS restricts access to only those with a valid ITRANS eQualifID digital certificate.

Using the ITRANS Claim Service, your dental office will also have access to an ITRANS website. This website provides access to information about each claim that has left your office over the past 90 days, including the patient's name, the time the claim was sent, the insurance carrier, the type of transaction, error codes, and whether the claim was processed by the insurance carrier.

Enrolling in the ITRANS Claim Service

In order to successfully submit claims over the Internet, you will need to enroll in the ITRANS Claim Service and download/install the ITRANS provider Digital Certificate.

Note: The digital certificates needed for the ITRANS Claims Service are issued by Canadian Dental Association. The certificates are called the CDA Digital ID and are available directly from the CDA website.

To enroll in the ITRANS Claim Service

- 1. From your Internet browser, go to services.cda-adc.ca.
- 2. Login using your existing username and password for the CDA website. If you do not have a username and password, contact the CDA Practice Support Services Help Desk at (866) 788-1212.
- 3. Click MY SUBSCRIPTIONS.
- 4. Click Subscribe.
- 5. Follow the instructions to download the CDA Digital ID for each dentist in the office.

Note: This should only be downloaded on the main ITRANS server computer.

6. Once the CDA Digital Certificate(s) finish downloading, contact Dentrix Customer Support at 844-346-0806 for assistance in installing the ITRANS software.

Note: If you have any questions related to CDA username and password or need other help with ITRANS, you can contact the CDA Practice Support Services Help Desk at 1-866-788-1212.

For more information, visit www.cda-adc.ca/en/services/itrans

To download and install the ITRANS Provider Digital Certificate

- 1. From your Internet browser, go to services.cda-adc.ca.
- 2. Have the provider log in using his or her existing username and password for the CDA website.
- 3. Click My CDA Digital ID.
- 4. Select office, and then click **Download Digital ID**.

Note: If you have any questions related to CDA username and password or need other help with ITRANS, you can contact the CDA Practice Support Services Help Desk at 1-866-788-1212.

To check if providers have Digital Certificates installed

- 1. Open Internet Explorer.
- 2. In the top-right corner, click the **Tools** icon, and then click **Internet options**.

- 3. Click the **Content** tab.
- 4. Click Certificates.

The certificates are listed on the **Personal** tab. They are issued to the actual provider's name and are issued by CanDentAssocCA.

Installing ITRANS Claim Director and CCDWS

Note: Before you begin, you will need to know the Windows username and password for the server computer where you will install ITRANS. This needs to be the username and password for the user that installed your ITRANS Certificates.

After registering the digital certificate from the Continovation Services Inc. website, you are ready to install and configure the ITRANS Claim Director software on your computers. You will download and install ITRANS Claim Director on each computer where you will be submitting electronic claims, beginning with the ITRANS server.

You will need to download and install two different software programs to use ITRANS: ITRANS Claims Director and CCDWS.

Please contact Dentrix Support at 1-800-781-5230 to have a customer support representative upload the needed software to your office. The customer support representative can also help with the installation of ITRANS.

To download and install ITRANS Claim Director on the ITRANS server

- 1. In your Internet browser, go to cda-adc.ca/get/.
- 2. Under ICD Software for ITRANS 2.0, click ICD for Windows.

After the ITRANS software downloads, double-click the download file to run the Setup program.

The **Select the language** screen appears.

ITRANS	Claims Director - InstallShield	l Wizard	×
ځ	Select the language for the inst	tallation from the choice	es below.
	English (United States)		~
		<u>0</u> K	Cancel

3. Leave **English** selected as the language (or change the language as needed), and then click **OK**.

The **Preparing to Install** screen appears followed by the **Welcome** screen.

ITRANS Claims Director - InstallShield Wizard			
ی	Preparing to Install ITRANS Claims Director Setup is preparing the InstallShield Wizard, which will guide you through the program setup		
	Extracting: ITRANS Claims Director.msi		
	Cancel		
记 ITRANS Claims Director - In	stallShield Wizard X		
뒍 ITRANS Claims Director - In:	Welcome to the InstallShield Wizard for ITRANS Claims Director		
HTRANS Claims Director - In:	stallShield Wizard × Welcome to the InstallShield Wizard for ITRANS Claims Director The InstallShield(R) Wizard will install ITRANS Claims Director on your computer. To continue, dick Next.		
ITRANS Claims Director - Ins	stallShield Wizard × Welcome to the InstallShield Wizard for ITRANS Claims Director The InstallShield(R) Wizard will install ITRANS Claims Director on your computer. To continue, click Next. WARNING: This program is protected by copyright law and international treaties.		
ITRANS Claims Director - Inst	stallShield Wizard × Welcome to the InstallShield Wizard for ITRANS Claims Director Image: Claims Director The InstallShield(R) Wizard will install ITRANS Claims Director on your computer. To continue, click Next. Image: Claims Director		

4. Click Next.

The License Agreement screen appears.



🖟 ITRANS	×			
Destinati Click Nex	i on Folder xt to install to this folder, or dic	k Change to insta	ll to a different folder	と
	Install ITRANS Claims Directo C:\Program Files (x86)\CDA\I	r to: CD\		<u>C</u> hange
InstallShield -		< <u>B</u> ack	<u>N</u> ext >	Cancel

6. Accept the default install location (or click **Change** and specify a new location if you need to), and then click **Next**.

The Service Logon Account Information screen appears.

🖟 ITRANS Claims Director - InstallShield	d Wizard	×
Service Logon Account Information Please enter the account credentials for	the user running the service.	と
Specify the user name and password of the user account must be in the form DOMAIN\	user account that will logon to Jsername.	o use this application. The
User Name (DOMAIN\Username):		_
		Browse
Password:		
1		
InstallShield		
	< <u>B</u> ack Next >	> Cancel

7. In the **User name** and **Password** boxes, type the Windows username and password for the Windows user account on this server used to install ITRANS, and then click **Next**.

The **ICD Folder** screen appears.

记 ITRANS	Claims Director - InstallShie	ld Wizard		×
ICD Folde Click Cha	r ange to set the ICD Folder, the	en click Next.		さ
	Set ICD folder to: C:\ICD\			<u>C</u> hange
InstallShield -		< <u>B</u> ack	Next >	Cancel

- 8. Click Change, click the create new folder icon, name that folder ITRANS, and click to select it.
- 9. Make sure the folder name is set to C:\ICD\ITRANS, and then click **Next**.

The Time when ICD application checks for updates screen appears.

🖟 ITRANS Claims Di	rector - InstallShiel	d Wizard		×
Time when ICD application checks for updates Set the time for the ICD to check for updates, then click Next			と	
	– Set Time to check f	for updates		
	Set Hour:	Set minute:		
InstallShield		< <u>B</u> ack	Next >	Cancel

10. Use the **Set Hour** and **Set minute** boxes to set the time for the ICD application to check for updates, and then click **Next**.

The Network Folders screen appears.

itrai	NS Claims Director - InstallShield Wizard	×
Netwo Click	rk Folders Change to set the Network Folders, then click Next.	と
C	ABC Folder: C:\ccd\telusb\	<u>C</u> hange
	C:\ccd\instream\	<u>C</u> hange
	MBC Folder: C:\ccd\mbc\ Telus A Folder:	<u>C</u> hange
	C:\ccd\telusa\ Telus B Folder:	<u>C</u> hange
	C:\ccd\telusb\ V2ROT Folder:	<u>C</u> hange
InstallShie	C:\ccd\telusa\ Id	Cancel
		Cancer

- 11. Next to **ABC Folder**, click **Change**, and set that folder to c:\ccd\telusb.
- 12. Accept the default network folder locations for all other folders (or click **Change** and specify a new locations if you need to), and then click **Next**.

The File Names screen appears.

🛃 ITRANS Claims Director - InstallShie	ld Wizard		×
File Names Type to set File Names, then click N	ext.		さ
Input file naming conventi input Output file naming conven	on		
output			
InstallShield	< Back	Next >	Cancel

13. Click Next.

The **Ready to Install** screen appears.

🞲 ITRANS Claims Director - InstallShield Wizard	×
Ready to Install the Program The wizard is ready to begin installation.	と
Click Install to begin the installation.	
If you want to review or change any of your installation settings, exit the wizard.	, click Back. Click Cancel to
InstallShield <u>Sack</u>	nstall Cancel

14. Click Install.

The Installing ITRANS Claims Director screen displays the status of the installation.

🖟 ITRANS (Claims Director - InstallShiel	d Wizard	_		×
Installing The prog	ITRANS Claims Director ram features you selected are	being installed.		Ś	4
1	Please wait while the InstallS This may take several minute	hield Wizard install s.	s ITRANS Claims Dire	ctor.	
	Status:				
InstallShield					
		< <u>B</u> ack	<u>N</u> ext >	Cance	el

To download and install CCDWS on the ITRANS server

- 1. In your Internet browser, go to cda-adc.ca/get/.
- 2. Under CCDWS Communication Software for CDAnet, click CCDWS for Windows.

After the CCDWS software downloads, double-click the ccdws-latest-win-install.exe download file to run the Setup program.

The **Welcome** screen appears.



3. Click Next.

The License Agreement screen appears.

🍼 CCDWS - InstallAware Wizard		_		×
License Agreement Please carefully read the following license a	greement.		0	
End User Licensing Agreeme	nt			^
The Canadian Life and Health Association ("CLHL Communications Driver - Web Services (CCDWS, the case that you represent a corporation or oth organization (collectively and interchangeably, "L exclusive license to use the Software subject to by the terms of this End User Software License A By installing/using this Software, You acknowledge to be bound by the terms of this Agreement as it which you first click the "Accept" button. If You of Agreement, CLHIA is unwilling to grant You a lice	A"), the owner of the "Software"), i er organization, t icensee" or "You") Your acceptance a greement ("Agree ge that You have r relates to this sof to not click "Accep nse to the Softwa	the Common is willing to gran hat corporation) a limited, perso and agreement t ement"). read, understan ftware as of the t" to the terms o re.	t you, or, in or onal, non- to be bound d, and agre date on of this	1
I accept the terms of the license agreement				
	< <u>B</u> ack	<u>N</u> ext >	Cance	el

4. Click I accept, and then click Next.

The Import Information screen appears.



5. Click Next.

The **Destination Folder** screen appears.

🔮 CCDWS - InstallAware Wizard		_		\times
Destination Folder Select folder where setup will install files.			6	
Install CCDWS to:				
c:\ccd		<u>C</u> hang	je	
Destination Folder				
Required Disk Space:		2,12	20 KB	
Remaining Disk Space:		1,562,00	8 MB	
	< <u>B</u> ack <u>N</u> ex	t >	Cano	cel

6. Click Next.

The **Setup Type** screen appears.

0	CCDWS - InstallA	ware Wizard		_		\times
	Setup Type Choose the setu	p type that is best for your ne	eds.		0	
	Please select a	setup type.				
	Omplete	All program features will be in most disk space.	stalled. This optic	on requires the		
	○ C <u>o</u> mpact	Program will be installed with may disable some application	minimum required functionality.	features. This		
	() Cu <u>s</u> tom	Choose which program featur Recommended for advanced	es you want insta users.	alled.		
			< <u>B</u> ack	<u>N</u> ext >	Cano	el

7. Leave **Complete** selected, and then click **Next**.

of CCDWS - InstallAware Wizard	—		×
Service Account Configure the account and password that will be used to run the ser	vice.	0	
The CCDWS service must be able to find the certificates it uses for o with the remote carriers. If certificates are installed under your user enter your account information below. If certificates are stored und account then these may be left blank.	communica r account, er the ma	ating , then ichine	
Service User Account (DOMAIN\userid)			
Service User Password			
•••••			
< <u>B</u> ack <u>N</u> ext	t >	Cano	el

8. In the **Service User Account** and **Service User Password** boxes, type the Windows username and password for the Windows user account on this server used to install ITRANS, and then click **Next**.

The Completing the InstallAware Wizard for CCDWS screen appears.



9. Click Next.

The Installing CCDWS screen appears and shows the installation status.

0	CCDWS - Ins	stallAware Wizard		_		\times
	Installing C The progra	CDWS m features you selected are bein	g configured.		0	
	1	Please wait while the InstallAwa take several minutes.	re Wizard installs C	CDWS. This ma	у	
		Status: Service:				
			< <u>B</u> ack	Next >	Cano	el

When finished, a **Configuration Review** message appears.



10. Click **No**.

The **Successfully completed** screen appears.



11. Click Finish.

Copying and Configuring .ini Files

You will also need to copy and make some small configuration changes in two .ini files that are used by ITRANS Claim Director.

To copy and configure the CDANet.ini and CCD.ini files

- 1. Open Notepad (or another text editor).
- 2. In Notepad, open the CDANet1.ini file from: \\fs1\installs\Dentrix\Dentrix International\Canada\ Eclaims\INI Files\itrans\ITRANS 2.0
- 3. Make the following changes in the CDANet1.ini file:

DatabasePath=[the path to the folder where the ITRANS database is located]

Note: This is not needed on Dentrix G7.1 or later. For Dentrix versions older than G7.1, this should be the path of the CCD folder.

EXEPATH=[Dentrix Program Files Path] Example: C:\Program Files (x86)\Dentrix CCDPath=[Path to the folder where the CCD.ini file is located] DataPath=[Path to the ICD folder]

- 4. After completing the configuration for the CDANet1.ini file, save the CDANet1.ini file in the C:\ Windows folder, and then click **File > New** to close the .ini file.
- 5. In Notepad, open the CCD.ini file from: \\fs1\installs\Dentrix\Dentrix International\Canada\Eclaims\ INI Files\itrans\ITRANS 2.0
- 6. Save the CCD.ini into the CCD folder (this should correspond to the CCDPath you configured inside the CDANet1.ini file in step 3).
- 7. To sharing the CCD folder (so the workstations are able to use ITRANS), in Windows File Explorer, right-click the CCD folder, and from the shortcut menu, click **Properties**.
- 8. Click the Sharing tab.
- 9. Click Advanced Sharing.
- 10. Select Share this folder.
- 11. Click Permissions.

Advanced Sharing	<
∑ <u>S</u> hare this folder	
Settings	
S <u>h</u> are name:	
CCD	
Add Remove	
Limit the number of simultaneous users to: 20	
Comments:	
Permissions Caching	
OK Cancel Apply	

12. Select Everyone, and then select Full Control.

Permissions for CCD		>
Share Permissions		
Group or user names:		
Section Everyone		
	A <u>d</u> d	<u>R</u> emove
Permissions for Everyone	Allow	Denv
Eull Control		
T di Condoi	\sim	
Change	\leq	
Change Read	NN	
Change Read	NN	
Change Read	NN	
Change Read	ND	
Change Read		

13. Click **OK**.

14. Repeat steps 7-13 to share the ICD folder also.

Setting Up and Sending Electronic Claims

After you install ITRANS Claim Director, you need to set up your software to send and receive electronic claims.

Note: ITRANS does not make any sounds when sending the claim. Do not be alarmed if you hear nothing after you send a claim. Just wait for the printout to verify all claims were transmitted.

Setting up and sending electronic claims in Dentrix

When creating electronic claims in Dentrix, the claims need to be sent to the Batch Processor rather than to the printer. This is set up by default, but you will want to verify that Dentrix is using the correct setting.

To verify that electronic claims will be sent to the Batch Processor

1. In the Ledger, from the File menu, click Direct Processing Options Setup.

The Direct Processing Options Setup dialog box appears.

Direct Processing Options Setup
Insurance Claims:
Batch 💌
Display Real-Time Payor Notice
Required Attachments:
✓ Notify if Required
Automatically Include if Required
Billing Statement:
Batch 💌
Eamily Ledgers:
Batch 💌
Walkouts:
Batch 💌
Tired of the printing, folding and mailing? Learn how to send claims and statements with just a couple clicks of the mouse.
<u>D</u> K <u>C</u> ancel

- 2. Under Insurance Claims, verify that Batch is selected.
- 3. Click OK.

To send electronic claims

- 1. From the Batch Processor in the Office Manager, select all claims that you want to send electronically. (To select multiple claims, press the CTRL key on your keyboard while selecting the claims.)
- 2. On the Office Manager toolbar, click the Electronic Claim Submission button $\frac{3}{2}$

The Electronic Claims Submission dialog box appears.



- 3. Make sure Selected Dental Claim Forms is selected.
- 4. Click OK.

The selected claims are verified and sent. While the claims are being sent, the CDANet window will appear.

This may take a few minutes, depending on how quickly the electronic claims process and the number of claims you send.

After the submission is complete, the window closes and a transmission report is sent to your printer.

Frequently Asked Questions

- Q: How does ITRANS Claim Director work?
- A: When you use ITRANS Claim Director to send electronic claims, ITRANS receives the claims and checks them for completeness of data and appropriate formatting. Claims that fail these checks will be returned to you with a message explaining any errors, allowing you to correct the errors and resubmit the claims. ITRANS detects duplicate submissions and allows authorized individuals to investigate the status of a claim while ensuring that privacy laws are respected. Once all information is verified, ITRANS forwards the claim to the specified insurance carrier for automatic processing by its claims system. Because electronic claims are processed automatically, the insurance carrier can transmit an explanation of benefits (EOB) through ITRANS back to your dental office in real time, typically less than 60 seconds.
- Q: Does ITRANS replace CDAnet?
- A: No, ITRANS works with CDAnet, it does not replace it. CDAnet is a standards development and administrative unit within CDA. ITRANS is a transaction product of Continovation Services Inc., a subsidiary of CDA, and implements standards for the transmission of health claims. ITRANS continues to use CDAnet when sending electronic claims. While CDAnet is limited to dental-specific transactions, ITRANS is specifically designed to address the electronic messaging needs of any health community and to support the implementation of new standards as they become available.
- Q: Will ITRANS allow the dental community or others to access confidential information?
- A: No. ITRANS operates within in a secure system; all data is handled in accordance with privacy legislation and consent requirements.
- **Q:** Are there any costs involved with switching to ITRANS?
- A: Dentrix and Henry Schein One do not add additional fees if an office chooses to use ITRANS instead of CDAnet. Doctors who are members of the Canadian Dental Association will not see any extra fees for using the ITRANS service.
- Q: What are the system requirements for ITRANS?
- A: The ITRANS product requires access to the Internet and a current Internet browser (Google Chrome is recommended). You must have JavaScript and Cookies enabled in your Internet browser (options/ preferences). If you use Google Chrome or Internet Explorer, these are enabled by default. For further information, please contact Dentrix Customer Support at 1-800-336-8749.
- Q: Can electronic claims be sent through ITRANS to all insurance companies?
- A: ITRANS Claim Director can send to all insurance companies currently supporting electronic claim submissions. Like eClaims for CDAnet, you still need to know the insurance company's carrier ID and claim format. To get a list of insurance companies and their assigned carrier IDs and claim formats, contact Dentrix Customer Support at 1-800-336-8749.

For more information on sending claims in Dentrix, refer to the Dentrix User's Guide or Dentrix Help.