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### **DXC Assure Claims**

Meet consumer expectations and optimize processes with a flexible, scalable, and configurable claims management system.

# The Electronic Claims Payments Process with Viewpost – User Guide

#### Release version 24.3 September 2024



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# Overview & basic details of the Electronic Claims Payments Process

This section contains basic guidelines, preliminary advisory, and settings pertaining to the Electronic Claims Payments process.

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## **The Electronic Claims Payments Process**

With a view to facilitate the Electronic Claims Payments (ECP) for its users, DXC Assure Claims integrates with Viewpost thereby making transacting smoother on the platform.

This integration involves two steps:

- > Sending Financial Data to Viewpost.
- > Importing the status of financial data sent to Viewpost back into the Assure Claims system.

### Initial Setup and Configurations in Assure Claims

Users of Assure Claims must carry out the below mentioned one-time exercise to be able to complete this integration process. The process entails the following 3 steps –

- > Creating a Viewpost Account and Registering a Bank Account
- Completing Enrollment
- Configuring RMA and Activating Payments

Please select an appropriate Insurance RISKMASTER/DXC Assure Claims & Viewpost initial setup user guide.

Integration User Guide for customers at v.18.3 or lower

Integration User Guide for customers at v. 18.4 or above



Payment Successfull

Contir

# Sending Data to the Viewpost System

This section contains details of the various processes and steps involved in the sending data to Viewpost

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Once the initial setup is complete then in order to push data to the Viewpost System we need to perform the following steps:

# Task Manager Utility – Offline Mode

All the Transactions for the distribution type mapped to Viewpost will be extracted in the Viewpost standard and will be pushed to Viewpost.

> Now to execute Batch job go to Utilities -> View Scheduled Tasks -> Select Print Check Batch Utility

$\otimes$		
Task Type:		٣
	DIS	
Task Name:	MBR	<b>^</b>
	PSO	100
Sub Task Name:	1099-MISC	
oud rook namer	Process WPA Diaries	
Cohedula Tura	Financial History Processing	
Schedule Type	Billing Scheduler	
	BES Scheduler	
	Print Batch FROI ACORD	
	History Tracking	
	Policy System Undate	
	Print Check Batch	
	Claim Balancing	
	Fraud Analytics Scheduler	
	Auto Mail Merge	
	Reserve Balance	
	Print Batch EOB	
	PositivePay	
	WC Recalc Utility	-

> On the next screen provide Data and Time for running the job

Utilities / View Scheduled Tasks	
Schedule a Task	
80	
Task Type:	Print Check Batch
Task Name:	Print Check Batch
SubTask Name:	None
Schedule Type:	OneTime
Send Email Notification	Parameter:
Send Email Notification	
Enter the Date and Tim	e you would like to Run the Task on:
Date:*	<b>—</b>
Time:* (India Standard Time)	

On the same screen shown in point b) below there will be shown a "Print Check Button Related Parameters."

Click on the Add Button on the right-hand side and a screen will open.



> Provide the required criterion setting and Click save button.

Utilities / View Scheduled Tasks		ত্র ত্র
Print Check Batch Related Par	ameters: Designers/TaskManager/Che 😑 🖾	
localhost/RiskmasterUI/UI/Utilitie	es/ToolsDesigners/TaskManager/Chec	
Check Batch Print Settings		•
New Sector		
Bank Account:	Do Not Use 🔻	
Distribution Type:	Regular Ma 🔻	
Check Stock:	¥	
Order Field:	(None) 🔻	
Org. Hierarchy:		
Org Hierarchy Level(For Display Only):	Client •	
Include Auto Payments?:		
Include Combined Payments?:		
Postcheck Register Report Type:	Detail Osummary Osub Account	

> The Job will appear on TM JOBS View Screen.

Utilities / Vie	Utilities / View Scheduled Tasks							
Task List								
¢+								
	Task Name	Schedule Type	Next Run Date/Time					
$\bigcirc$	Print Check Batch	OneTime	11/28/2018 12:33 PM					

- > When the job is executed, it will complete with either of the below two Job states:
  - Completed If the data is successfully sent to Viewpost system then this status will appear.
  - Completed with Errors If there are any Validation/System Errors while sending data to Viewpost then this status will appear.
- Complete description of errors and process will be logged in job files that can be found in zip folder attached on TM Jobs View Screen.

tilities => TM Jobs View	/						
Running Jobs							
Job Name	Description	Job St	ate Sta	rt Date/Time	Er	nd Date/Time	
Abort I	Defreeh						
Archived Jobs	tenesi						
1 - 25 of 31 records					Page	1 of 2 First  Pr	evious (Next
					-		
Print Check Batch Pr	rintCheckBatch	Completed With Error	10/01/2018 4:52 AM	10/01/2018 5:07 AM			
Print Check Batch Pr	rintCheckBatch	Completed	10/01/2018 4:22 AM	10/01/2018 4:50 AM			
Print Check Batch Pr	rintCheckBatch	Completed	10/01/2018 4:04 AM	10/01/2018 4:08 AM			
i		•		•			

In the zip folder highlighted above a complete log file will be present indicating the description of process executed.

> User can view the complete process by clicking on the Job State as well. A screen will open.

Utilities => TM Jobs View	0	TM Job Status Details - Google Chrome
Running Jobs	<li>O Not</li>	secure   rmavpdemo.dxc-rmcl.com/RiskmasterUI/UI/Utilities/ToolsDesigners/TaskMan
Job Name Description Job State		10/24/2018 07:13 AM - Check print batch job started. 10/24/2018 07:13 AM - Fetching Account id: 13 details 10/24/2018 07:13 AM - Print Check completed for Account: 13 10/24/2018 07:13 AM - Post data to Viewpost started. 10/24/2018 07:14 AM - Creating zip file for printed checks 10/24/2018 07:14 AM - Zip file created successfully for 4 files.
Abort Refresh Archived Jobs 1 - 25 of 31 records	Status Details:	10/24/2018 07:14 AM - Attach file to database. 10/24/2018 07:14 AM - File attached to database successfully. 10/24/2018 07:14 AM - The Viewpost Job Completed Successfully.
Print Check Batch PrintCheckBatch Completed 10/2 AM Print Check Batch PrintCheckBatch Completed 10/2 AM		

### **Online Mode**

The Print Check Batch Utility can be scheduled from the UX screen as well. To do this, you need to go to the Print Checks tab under the Search Tab.

csc csc 🔗	Document   Diaries   Funds	My Work <del>-</del>	Search -	User Documents -	Reports -	Users Portlets -	?	al.
	Apply Payments to Coverages							
	Bank Account							
	Bulk Check Release							
	Combined Payment							
	Custom Payment Notification							
	Mark Checks as Cleared							
	Payee Check Review							
	Payment Notification							
	Print Checks							
	Re-Create Check File							
	Reset Printed Check							
	Stop Pay Checks							
	Supervisory Approval							
	Transaction							
	Un-Clear Checks							
	Void Checks							

int Checks 👌 🗵					
rint Checks					
Precheck Register	t Check Batch Post Check Register				
<b>.</b>					
Bank Account	Distribution Type	Check Stock	Fi	rst Check #	
mk	<ul> <li>Regular Mail</li> </ul>	Operating Account Check Stoc	k 🔻 1	2258	
Check Date	Check Batch	Precheck Date	#	of Checks	
MM/dd/yyyy	2476	11/19/2018	3		
Total Amounts	Order Field				
\$139.00	(None)				

Selecting the Save button schedules the Print Check Batch Utility as depicted previously in the Offline Mode.

Utilities / View	Utilities / View Scheduled Tasks						
Task List							
¢ +							
	Task Name	Schedule Type	Next Run Date/Time				
$\bigcirc$	PrintCheckBatch	OneTime	11/19/2018 7:31 PM				

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Hereafter, the steps mentioned in the Offline Mode need to be followed. This is especially for those clients who find working on the UX screen convenient.

## Importing Data in to the Viewpost System

The Data Imported from Viewpost will include the details about the:

- Status of the Payment (i.e., Processed, Pending etc.).
- Method of payment used by Viewpost

#### Task Manager Utility – Viewpost Import

> Now to execute Batch job go to Utilities -> View Scheduled Tasks ->

Select Viewpost Import Utility

Task Type: Task Name: Sub Task Name: Sub Task Name: Schedule Type Schedule Type Task Name: Schedule Type Type Type Type Type Type Type Type			
Task Name: Task Name: Sub Task Name: Sub Task Name: Sub Task Name: Schedule Type Schedule Type Print Batch EOB PositivePay WC Recalc Utility DDS Auto Check Batch PUS SICS HR_INTERFACE WIMS MMSEA 1099-MISC_UX SubproAmali ISO Viewpost Import Gmail Sync Import Backage	Task Type:		•
Sub Task Name: Print Batch EOB PositivePay WC Recalc Utility DDS Auto Check Batch PUS SICS HR_INTERFACE WIMS MMSEA 1099-MISC_UX SubproAmail ISO Viewpost Import Gmail Sync Import Backage	Task Name:	Fraud Analytics Scheduler Auto Mail Merge Reserve Balance	^
Schedule Type DDS Auto Check Batch PUS SICS HR_INTERFACE WIMS MMSEA 1099-MISC_UX SubproAmali ISO Viewpost Import Gmail Sync Import Backage	Sub Task Name:	Print Batch EOB PositivePay	
SICS HR_INTERFACE WIMS MMSEA 1099-MISC_UX SubproAmali ISO Viewpost Import Gmail Sync Import Backage	Schedule Type	DDS Auto Check Batch PUS	
MMSEA 1099-MISC_UX SubproAmali ISO Viewpost Import Gmail Sync Import Reskage		SICS HR_INTERFACE WIMS	
ISO Viewpost Import Gmail Sync Import Backage		MMSEA 1099-MISC_UX SubproAmali	
Gmail Sync		ISO	_
Import Fackage		Gmail Sync Import Package	

> On the next screen provide Date and Time for running the job.

Utilities / View Scheduled Tasks	
Schedule a Task	
Task Type:	Viewpost Import
Task Name:	Viewpost Import
SubTask Name:	None
Schedule Type:	OneTime
Send Email Notification	Parameter:
Send Email Notification	
Enter the Date and Time	e you would like to Run the Task on:
Date:*	
Time:* (India Standard Time)	

> The Job will appear on TM JOBS View Screen.

Utilities	Utilities / View Scheduled Tasks							
Task L	Task List							
¢+								
	Task Name	Schedule Type	Next Run Date/Time					
$\bigcirc$	Viewpost Import	OneTime	11/30/2018 2:34 AM					

- > When the job is executed, it will complete with either of the below two Job states:
  - Completed If the data is successfully sent to Viewpost system then this status will appear.
  - Completed with Errors If there are any errors while sending data to Viewpost then this status will appear.
- Complete description of errors and process will be logged in job files that can be found in zip folder attached on TM Jobs View Screen

u	tilties => TM Jobs View							
1	Running Jobs							
	C1							
	Job Name	Description	Job St	ate Star	t Date/Time	En	d Date/Time	
	Abort	Refresh						
1	Archived Jobs							
	1 - 25 of 31 record	ds				Page 1	l of 2 First  Pr	evious (Next
	Job Name	Description	Job State	Start Date/Time	End Date/Time	Job Files		
	Viewpost Import	Viewpost	Completed	10/24/2018 7:16 AM	10/24/2018 7:16 AM		42	

In the zip folder highlighted above a complete log file will be present indicating the description of process executed.

> User can view the complete process by clicking on the Job State as well. A screen will open.

Jtilities => TM Jobs View						
Running Jobs	Ľ		TM Job Status Details	Google Chrome		
	<li>O Not s</li>	O Not secure   rmavpdemo.dxc-rmcl.com/RiskmasterUI/UI/Utilities/ToolsDe				
Job Name Description Job State		10/24/2018 07:16 AM - Started with ViewPost Import 10/24/2018 07:16 AM - The execution of Viewpost Im completed.Please check the ViewpostImport logs for t		t Import of Data. vpost Import data batch process ogs for the Transaction''s Status.		
Abort Refresh Archived Jobs	Status Details:					
1 - 25 of 31 records						
Job Name Description Job State Start Date/T						
Viewpost Import Viewpost Completed AM						

## Verifying the Data Imported from Viewpost

The Data Imported from Viewpost will include the details about the:

- > Status of the Payment (i.e., Processed, Pending etc.).
- > Method of payment used by Viewpost.

All the above-mentioned details will be visible in the "Check\_Memo" Column of the Transactions on the Assure Claims screen.

> Open the Viewpost Log from "TM Jobs View Screen" as explained earlier on.

VP_Viewpostlog.csv	CSV File	1 KB No	1 KB 24%	10/24/2018 8:14 AM	]
		VP_Viewpostlog.csv - No	tepad	_ 0	×
File Edit Format View Help Post Financial Data Process to Viewpost started. TRANS ID: 312849 Import Result: Imported Display Name: Check No. 356 Desc:The Payment rec					^
	Post data to Viewpost Compl	eted successfully with no valida.	ation Errors.		

Now go to Search -> Funds. The following screen will appear on which you must provide the check number retrieved from the above shown Viewpost Log and click on search icon.

Funds Criteria			
Search Criteria			
Q 💌			
Standard Payment Search			
Check Control Number	= •	,	
Check Transaction Date	Between •	MM/dd/yyyy 🚞	MM/dd/yyyy
Check Date	Between •	MM/dd/yyyy	MM/dd/yyyy
Check Amount	Between •	\$0.00	\$0.00
Payee Last Name	= •	r	
Payee First Name	= •	,	
Payee SSN/Tax ID	= •	,	
Check Number	= •	356	

Now Transaction Screen will open. Look for Check Memo Column on the Transaction screen. The Check Memo will show the status/ mode of payment used by the Viewpost.

ransaction (0518demo) unds (000010102992 * Pharmacists Mutual : Como * VOSS. AARONI							
+ 800000	▶♀ृि♠▣≔…	Philadelph					
Mail To State	Mail To Zip	Mail To Country					
CA California	12345	USA United States					
😰 Memo Information		1					
Memo Phrase v	Check Memo Sent to VP.Status:PROCESSED.Payment Type:Viewpost Digital Check	Transaction Notes					

Also look for Cleared Flag on the same Transaction screen and if the Status of that transaction is processed in the Check Memo column the cleared flag will be selected.

Transaction (0518demo)							
Funds (000010102992 * Pharmacists Mutual ; C	unds (000010102992 * Pharmacists Mutual ; Comp * VOSS, AARON)						
+80.							
Transaction							
Transaction Info	🔞 Transaction Info						
Payment	Cleared	Void	Collection				
Final Payment	Auto Check?	Combined Payment?	Supplemental Transaction				
Stop Pay	Enclosure						
Control Number	Claim Number	Distribution Type •					
0518demo	000010102992 Q	RML Regular Mail					

# Easier manual reconciliation during Viewpost payment reviews

Up until the previous release, the Job File (PrintCheck.csv) generated after running a Viewpost Print Check Batch job did not have an easy way to reconcile with individual payments thereby making payment reviews a difficult task. Now, with the inclusion of Control Number in the job file, it would be easier to reconcile the same. Please note that this control number is not sent to Viewpost and is only added for ease of manual review.



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