



# SMART DATA SOLUTIONS VIRTUAL MAILBOX

## Abstract

This manual will assist with online submissions of documents typically sent via mail.

Excellus Health Plan, Inc.

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## Abstract

Smart Data Solutions, Inc. (“SDS”), an independent company, has designed a web-based submission method to allow providers to electronically submit documents previously sent via the mail.

## Registration

Users will need to register an account within the portal to submit files. The following URL is used to access the enrollment form: <https://quickclaim.smart-data-solutions.com/quickclaim/servlet/quickclaim/template/ClearingHouse%2COpenEnrollment.vvm/cc/CHUMSUB>

Enter the following information on the enrollment form:

- Provider Name
- Provider Tax ID
- Provider NPI
- Contact Name
- Contact Phone
- Contact Email
- Password

Once you select “Submit” on your enrollment form, you will receive the following message:

### **YOUR ENROLLMENT IS NOT YET COMPLETE**

An account has been created for \_\_\_\_\_, and a welcome email has been sent to 'a \_\_\_\_\_ n' containing your account information. In order to continue, you must complete your enrollment using the link to Enrollment Portal and the information in the Welcome Email.

Then, you will receive an email from Stream Enrollment with your user name and URL.

```
Hello,
Thank you for enrolling in Smart Data Stream. Your account has been set up, however may require
additional set up before you can begin sending or receiving transactions.

You have enrolled for the following:

    Utilization Management Web Submissions
    Excellus
    Univera
    Medicare Enrollment

To complete your enrollment, please follow the steps below:

1. Log in to the portal using the credentials provided below. The URL is _____
2. You will be required to login with the password entered upon enrollment.

    User Name:

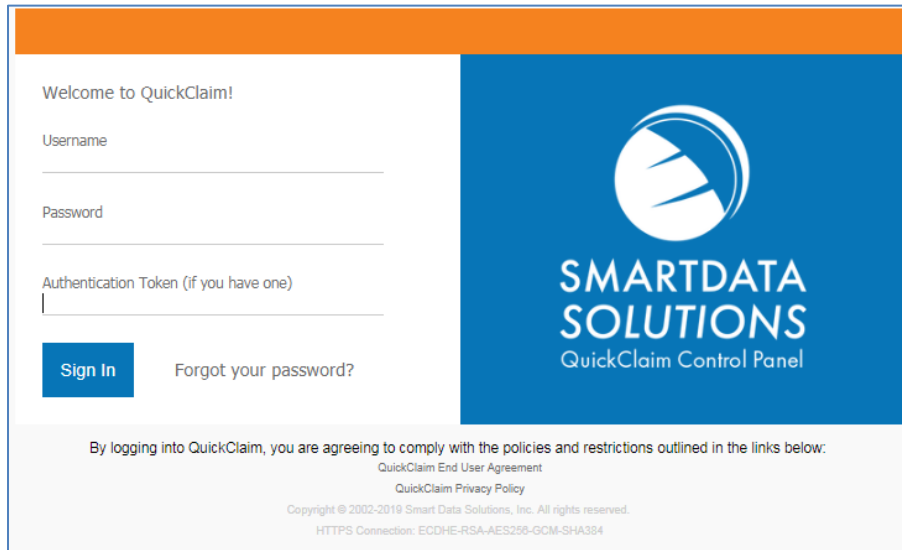
If you have any questions or experience any issues with this process, please contact
stream.support@sdata.us.

Thanks!
Stream Enrollment Staff
```

## Accessing the Portal

The following URL is used to access the provider portal website:

<https://quickclaim.smart-data-solutions.com/quickclaim/servlet/quickclaim>



Welcome to QuickClaim!

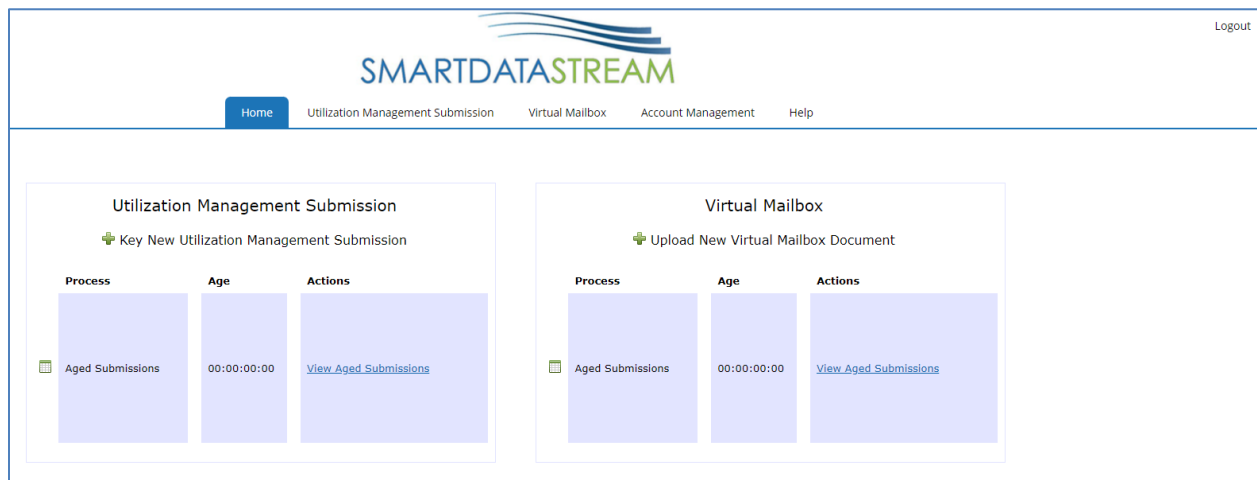
Username  
\_\_\_\_\_  
Password  
\_\_\_\_\_  
Authentication Token (if you have one)  
\_\_\_\_\_

[Sign In](#) [Forgot your password?](#)

**SMARTDATA SOLUTIONS**  
QuickClaim Control Panel

By logging into QuickClaim, you are agreeing to comply with the policies and restrictions outlined in the links below:  
[QuickClaim End User Agreement](#)  
[QuickClaim Privacy Policy](#)  
Copyright © 2002-2019 Smart Data Solutions, Inc. All rights reserved.  
HTTPS Connection: ECDHE-RSA-AES256-GCM-SHA384

Upon login, users will see the Smart Data Stream Clearinghouse Portal.



SMARTDATASTREAM

Logout

Home Utilization Management Submission Virtual Mailbox Account Management Help

### Utilization Management Submission

Key New Utilization Management Submission

Process	Age	Actions
Aged Submissions	00:00:00:00	<a href="#">View Aged Submissions</a>

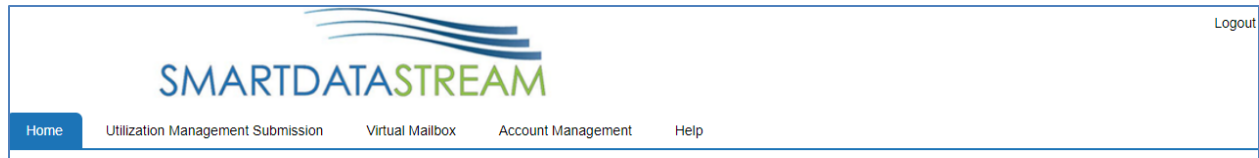
### Virtual Mailbox

Upload New Virtual Mailbox Document

Process	Age	Actions
Aged Submissions	00:00:00:00	<a href="#">View Aged Submissions</a>

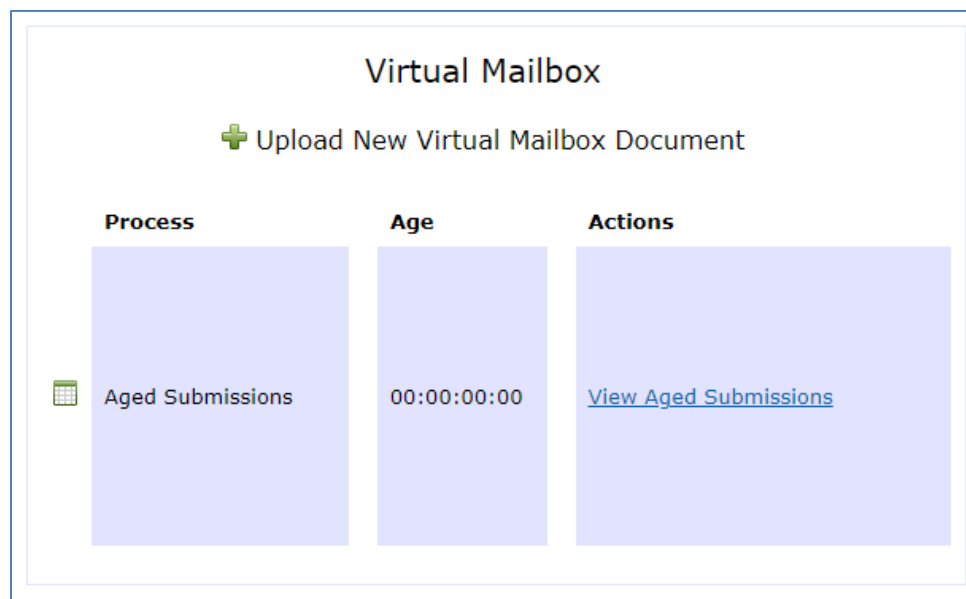
The home page contains the following:

## Navigation Ribbon



- Home – returns user to the Smart Data Stream home page
- Utilization Management Submission – see the UM Portal manual for additional details
- Virtual Mailbox – submitting and tracking of documents uploaded to the Virtual Mailbox
- Account Management - see the Account Management manual for additional details
- Help – contains additional resources such as system support and FAQs
- Logout – ends the session

## Virtual Mailbox



- Upload New Virtual Mailbox Document – this link will navigate to the online submission screen. See [Submitting Documents](#) for additional information.
- View Aged Submissions – this link is used to view submissions uploaded to the Virtual Mailbox within the past 3 years. See [Submission Tracking – Aged Files](#) for additional information.

## Virtual Mailbox Page

Select “Virtual Mailbox” from the Navigation Ribbon to redirect to the Virtual Mailbox page from anywhere on the portal:

View and manage your Virtual Mailbox documents from the past 90 days. View older Virtual Mailbox submissions using the button(s) below.

New Virtual Mailbox Submission

Older Virtual Mailbox Submissions

Search

Keyword  
SEARCH

Filter  
Date

Clear Filters

Show 10 entries

Date Submitted	PO Box	Clearinghouse Tracking Number	Payer Reference Number(s)	File Name	Status	Action
9/15/2021, 6:06:00 AM	PO Box 21146	SD	312 312 312	SDG	3.pdf	Accepted
9/15/2021, 6:05:00 AM	PO Box 211256	SC	311	SDI	41.docx	Accepted
9/15/2021, 6:05:00 AM	PO Box 211256	SD	31	SD	18.doc	Accepted
9/15/2021, 6:04:00 AM	PO Box 211256	SD	31	SD	37.pdf	Accepted
9/15/2021, 6:04:00 AM	PO Box 211256	SC	311	SC	02.pdf	Accepted


The page contains the following:

- New Virtual Mailbox Submission - this link will navigate to the online submission screen. See [Submitting Documents](#) for additional information.
- Older Virtual Mailbox Submissions – this link is used to view submissions uploaded to the Virtual Mailbox within the past 3 years. See [Submission Tracking – Aged Files](#) for additional information.
- Displays document level details for submissions uploaded to the Virtual Mailbox within the past 90 days. See [Submission Tracking – Document Level](#) for additional information.

### Submission Tracking - Document Level

This section will display information for submissions within the past **90 days**.

Date Submitted	PO Box	ClearingHouse Tracking Number	Payer Reference Number(s)	File Name	Status	Action
----------------	--------	-------------------------------	---------------------------	-----------	--------	--------

You can click on  next to most of the column headings to sort the results in ascending or descending order based on the column criteria.

- **Date Submitted** – date and time (Eastern/EST) of submission
- **PO Box** – PO Box Destination selected by the user at time of submission
- **Clearinghouse Tracking Number** – this is **not currently used** by the Health Plan

- **Payer Reference Number(s)** – within 24 hours of submission this field will populate the tracking number assigned to the document(s); also referred to as DCN. This number(s) should be referenced when communicating with the Health Plan.
- **File Name** – file name submitted through the Virtual Mailbox
- **Status** – status of the file uploaded through the Virtual Mailbox
  - Submitted: Document has been submitted by provider, but not yet accepted for processing by Health Plan
  - Accepted: Document has been accepted for processing by Health Plan
  - Rejected: Document is unable to be processed due to issues with upload and has been rejected by Health Plan



- **Action** - this column will display links to additional options
  - » Additional details regarding the submission, including the ability to see the EDI transaction and document transaction details:

## EDI Transactions

This page summarizes the EDI transactions for a specific claim/bill.

SDS59915000000039

SOURCE FILE NAME  
 TC24.pdf

RECEIVED DATE  
 2020-04-15 11:39

SDS DOCUMENT ID  
 SDS59915000000039

ORIGINAL REFERENCE ID  
 NA

Received Data

```
/K/Smartdata/solutions/Backup/upload/ClearingHouse/CH59915/Virtual Post/TC24.pdf
```

BACK

## Document Transactions

The transaction page allows you to view a full set of transactions that originate from a document. In addition to displaying these transactions, you may also view a document image by pressing 'View Document'. If a destination accepts status requests, you may click 'Request Status' to request a status update.

**Document Info**

Document Number:	SDS59915000000039
Original Document Number:	
Source File Name:	TC24.pdf
Received Date:	2020-04-15 11:39
Current Status:	Submitted - Awaiting Response



**Transaction History**

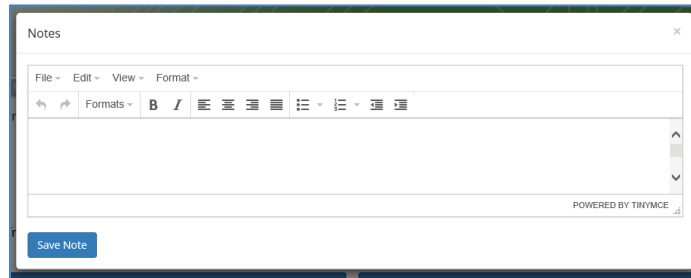
Show  entries


Transaction Date	Transaction Source	Transaction Type	Status	Actions
2020-04-15 11:39	Downstream Peer	Unknown Transaction Type	Submitted - Awaiting Response	

Showing 1 to 1 of 1 entries

[Previous](#) [Next](#)

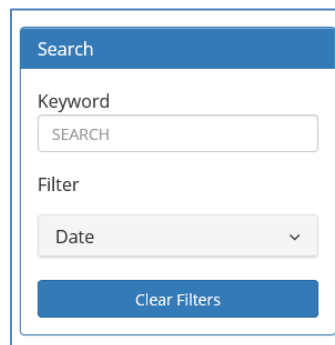
 This is a notes function that allows the user to add reminders or other information for their *internal use only*. Anything entered in this screen **will not** be viewable by the Health Plan. When notes are present, the icon will turn green (  )

A screenshot of a web-based 'Notes' interface. It features a title bar 'Notes' with a close button. Below is a menu bar with 'File', 'Edit', 'View', and 'Format'. A toolbar contains icons for undo, redo, bold, italic, text color, background color, bulleted list, numbered list, and link. A large text area for notes is below the toolbar, with a 'Save Note' button at the bottom left. A small 'POWERED BY TINYMCE' logo is at the bottom right.

 This allows the user to view the image(s) of the uploaded document(s)

## Filtering Results

The Search box on the left side will allow users to filter results by the following criteria:

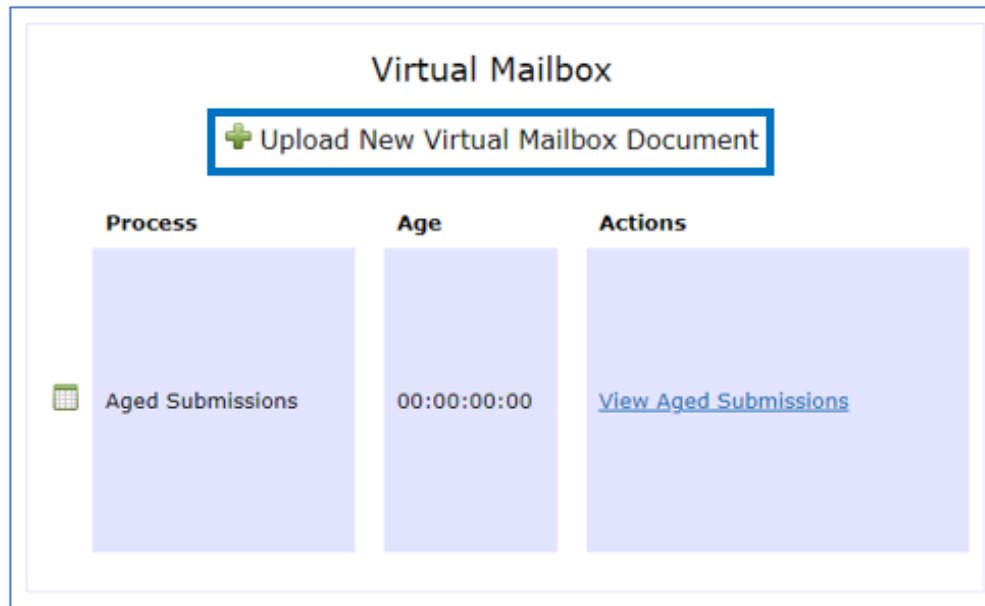
A screenshot of a search and filter interface. It has a blue header 'Search'. Below it is a 'Keyword' section with a text input field containing the word 'SEARCH'. Underneath is a 'Filter' section with a dropdown menu currently showing 'Date'. At the bottom is a blue button labeled 'Clear Filters'.

- Keyword - filters results based on the File Name or Payer Reference Number(s)
- Date - filters results based on the date the file was submitted

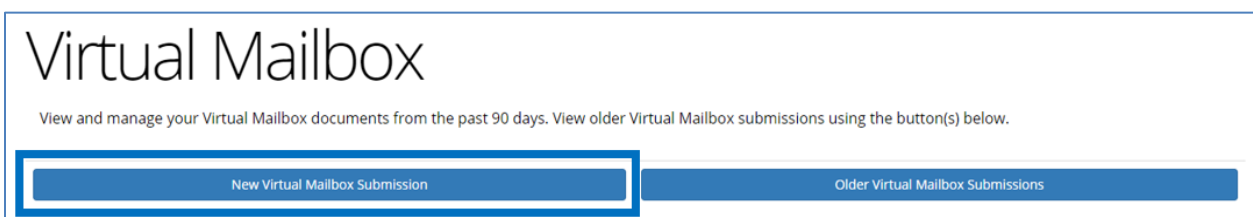
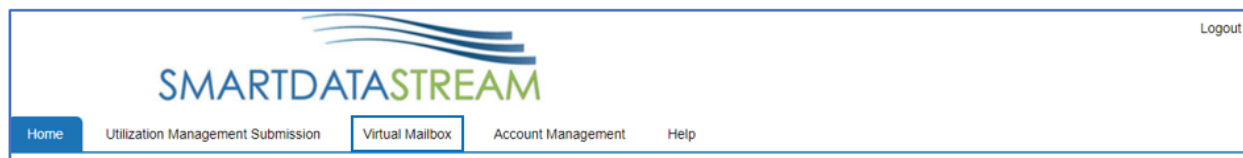


## Submitting Documents

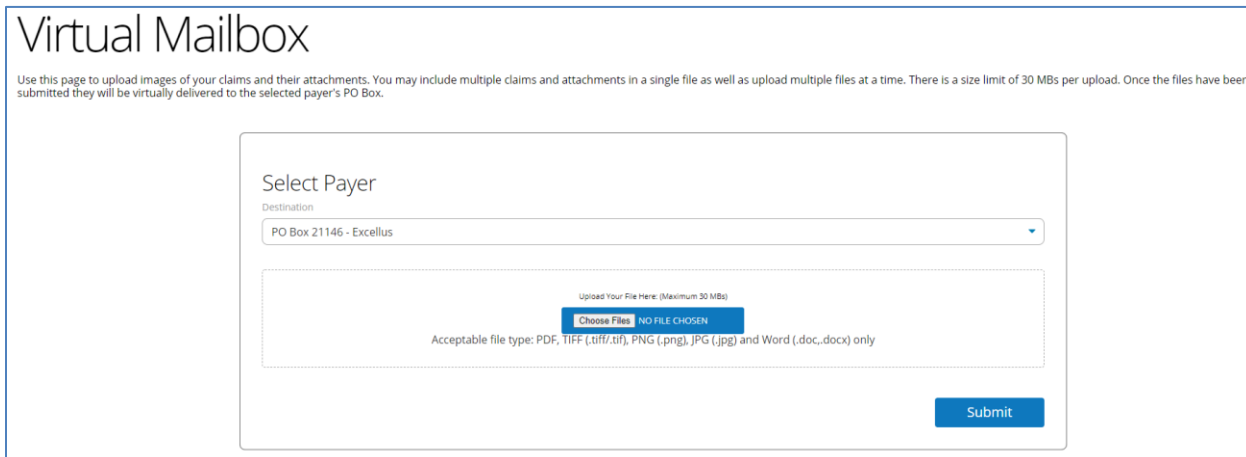
Option 1 - To submit a new document(s), you may click on the “Upload New Virtual Mailbox Document” within the box labeled “Virtual Mailbox” on the home screen.



Option 2 - To submit a new document(s), first select “Virtual Mailbox” from the Navigation Ribbon to go to the [Virtual Mailbox](#) page. Then, select “New Virtual Mailbox Submission”.



Either Option 1 or Option 2 will redirect the user to the Virtual Mailbox submission screen:



Virtual Mailbox

Use this page to upload images of your claims and their attachments. You may include multiple claims and attachments in a single file as well as upload multiple files at a time. There is a size limit of 30 MBs per upload. Once the files have been submitted they will be virtually delivered to the selected payer's PO Box.

Select Payer

Destination

PO Box 21146 - Excellus

Upload Your File Here: (Maximum 30 MBs)

Choose Files NO FILE CHOSEN

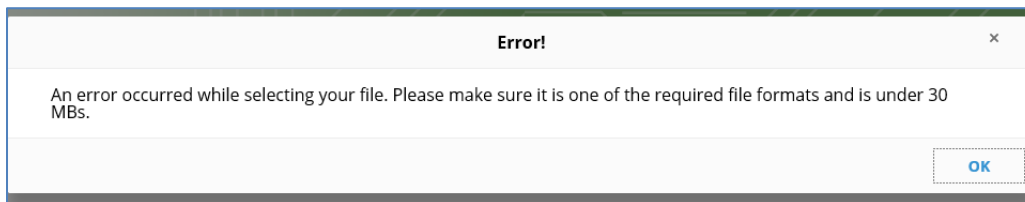
Acceptable file type: PDF, TIFF (.tif/.tiff), PNG (.png), JPG (.jpg) and Word (.doc/.docx) only

Submit

***Users may upload a file with multiple claims/attachments in a single file, as well as upload multiple files at a time. Files must be less than 30MBs, not password protected and in one of the following formats: PDF (.pdf), TIFF (.tif/.tiff), PNG (.png), JPG (.jpg) or Word (.doc/.docx).***

- **Destination** – select the appropriate PO Box to electronically submit the document(s) to.
  - PO Box 21146 – Excellus
  - PO Box 211256 – Univera
  - PO Box 211316 – Medicare Enrollment
- **File Upload Box** – users may either click the “Choose Files” box to select a file(s) from their computer or drag and drop a file(s) into the box.

Note: If a file(s) larger than 30 MBs or not in one of the required formats [PDF (.pdf), TIFF (.tif/.tiff), PNG (.png), JPG (.jpg) or Word (.doc/.docx)] is selected, the following error message will display:



Error!

An error occurred while selecting your file. Please make sure it is one of the required file formats and is under 30 MBs.

OK

When a file(s) has been attached, the file(s) name will show to the right of the “Choose Files” box.

Upload Your File Here: (Maximum 30 MBs)

Choose Files

TC1.pdf

Acceptable file type: PDF, TIFF (.tiff/.tif), PNG (.png), JPG (.jpg) and Word (.doc,.docx) only

To submit the file(s), click the “Submit” button under the file upload box. Once the file(s) has been submitted, the user will receive a message indicating the file(s) was submitted successfully. Users may upload additional files or select “I’m Done Submitting Files” to return to the [Virtual Mailbox](#) page.

PO Box 211256

TCS Inpat.pdf has been submitted successfully.

I'm Done Submitting Files

If the file(s) has previously been submitted, the user will receive a message indicating the file(s) has already been submitted. Duplicate file(s) will not be uploaded to the Health Plan.

PO Box 21146

'UM - IP8.docx' has already been submitted.

I'm Done Submitting Files

If multiple files are submitted and at least one has been previously submitted, the user will receive a message specifying the duplicate file(s) not uploaded to the Health Plan.

PO Box 21146

'UM - IP8.docx' has already been submitted.

TC2 SNF.pdf has been submitted successfully.

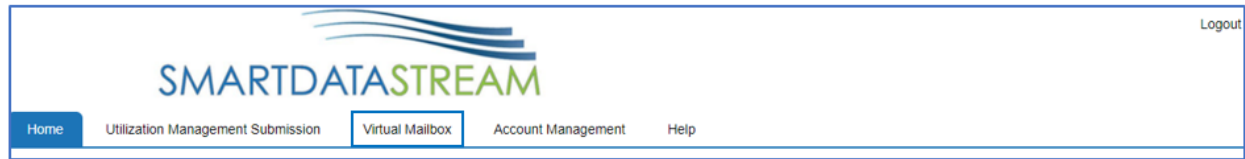
I'm Done Submitting Files

If the file(s) is password protected, the user will receive a message indicating the file(s) will not be uploaded until the file(s) is decrypted and re-submitted.

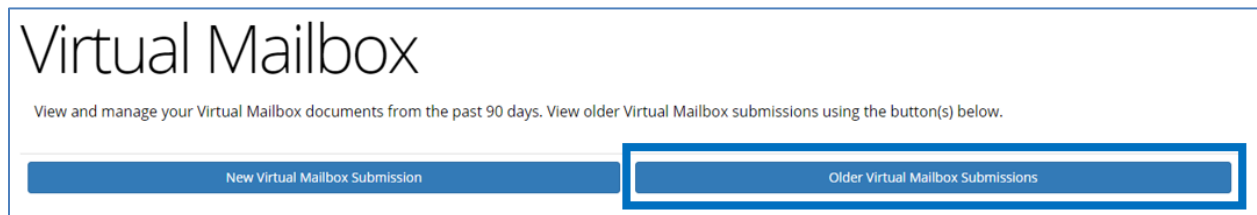
Password protected PDFs are not allowed. Please decrypt your file and resubmit. No files have been uploaded.

## Virtual Mailbox Files Page

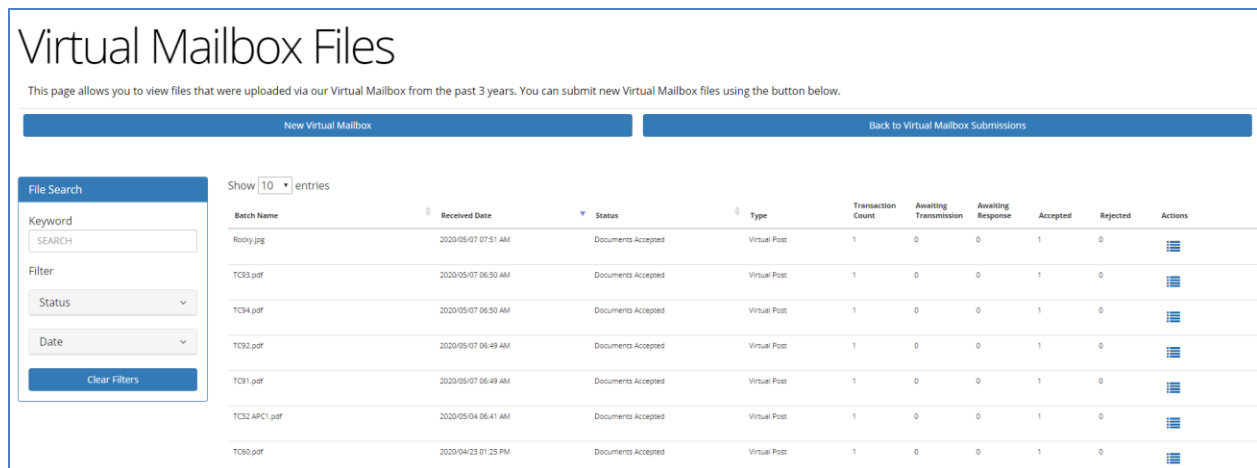
To track submissions through the Virtual Mailbox from the past 3 years, first select “Virtual Mailbox” from the Navigation Ribbon to go to the [Virtual Mailbox](#) page.



Then, select “Older Virtual Mailbox Submissions”.



This will redirect the user to the “Virtual Mailbox Files” page:




The page contains the following:



- New Virtual Mailbox - this link will navigate to the online submission screen. See [Submitting Documents](#) for additional information.
- Back to Virtual Mailbox Submissions – this link is used to navigate to the [Virtual Mailbox](#) page.
- Displays batch level details for submissions uploaded to the Virtual Mailbox within the past 3 years. See [Submission Tracking – Aged Files](#) for additional information.

## Submission Tracking – Aged Files

This section will display information for submissions within the past 3 years.

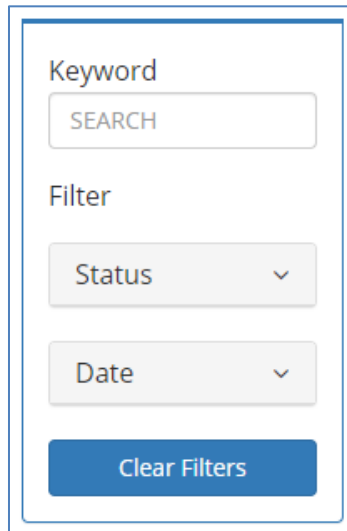
Batch Name	Received Date	Status	Type	Transaction Count	Awaiting Transmission	Awaiting Response	Accepted	Rejected	Actions
------------	---------------	--------	------	-------------------	-----------------------	-------------------	----------	----------	---------

You can click on  next to most of the column headings to sort the results in ascending or descending order based on the column criteria.

- **Batch Name** - file name submitted through the Virtual Mailbox
- **Received Date** - date and time (Eastern/EST) of submission
- **Status** – status of the file uploaded through the Virtual Mailbox
  - Submitted: Document has been submitted by provider, but not yet accepted for processing by Health Plan
  - Documents Accepted: Document has been accepted for processing by Health Plan
  - Rejected: Document is unable to be processed due to issues with upload and has been rejected by Health Plan
- **Type** - Virtual Post indicates the file was submitted through the Virtual Mailbox
- **Transaction Count** - number of transactions submitted
- **Awaiting Transmission** - number of transmissions awaiting transmission through the Virtual Mailbox
- **Awaiting Response** - number of files waiting to be received by the Health Plan
- **Accepted** - number of files accepted for processing by the Health Plan
- **Rejected** - number of files rejected by the Health Plan
- **Action** - this column will display , which links to the [Virtual Mailbox](#) page where additional actions are available 

## Filtering Results

The Search box on the left side will allow users to filter results by the following criteria:



The image shows a search and filter interface. It is enclosed in a blue border. At the top, under the heading 'Keyword', there is a light gray rectangular button with the word 'SEARCH' in blue. Below this, under the heading 'Filter', there are two dropdown menus. The first is labeled 'Status' and the second is labeled 'Date', both with a small downward arrow on the right. At the bottom of the filter section is a blue rectangular button with the text 'Clear Filters' in white.

- Keyword - filters results based on the Batch Name
- Status – filters based on the Status of the document (Rejected, Accepted, Submitted)
- Date - filters results based on the date the file was submitted