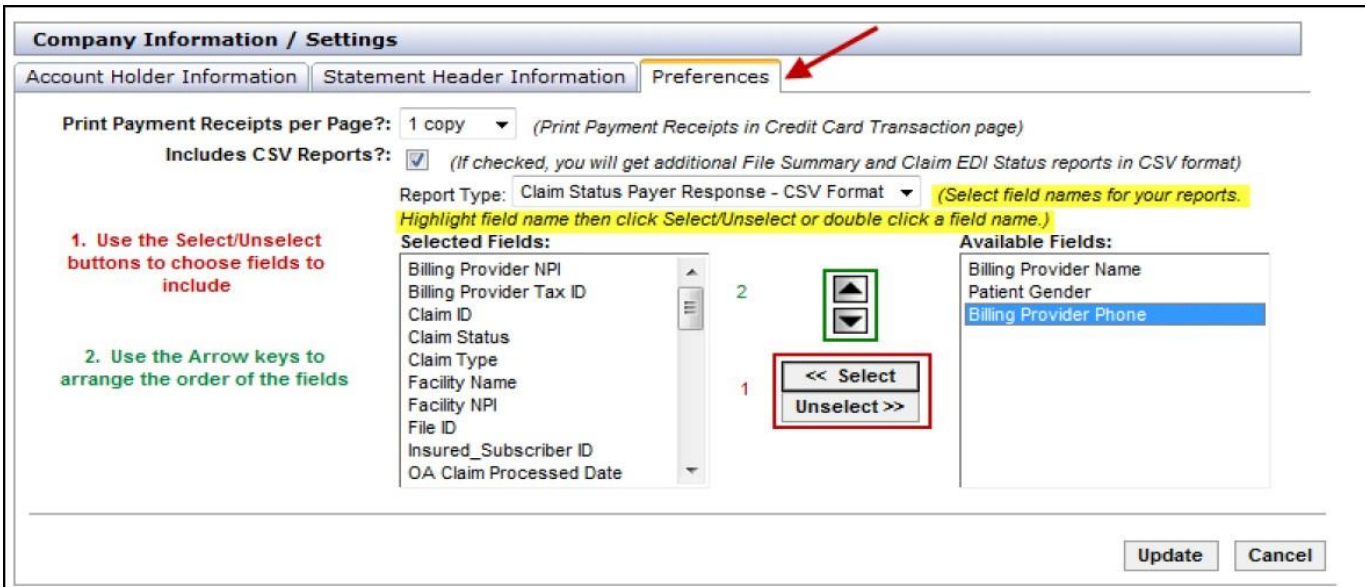Claim Status Messages we receive from payers are passed to users in the form of an EDI Status Report. EDI Status Reports are accessed in the Service Center menu under Download File Summary, and in Practice Mate in the Claims/Billing tab under Reports>Download File Summary. In addition to these reports, you may request to also receive a **Custom CSV EDI Status Report**. To request this service, please call Customer Support and ask for Custom CSV EDI Status Reports to be activated on your account.

SETTING UP YOUR CUSTOM REPORT

Once you've requested this service and it is activated on your account, you can access the report setup in your **Service Center** menu under **My Settings**. From the **Admin Section**, choose **Company Information:**
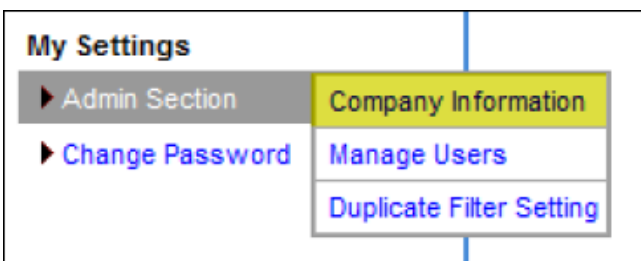
Click to the **Preferences** tab and ensure the **Includes CSV Reports? Checkbox** is checked. From the Available Fields list, select the items that you would like to appear in your Custom CVS EDI Status Report.

By choosing which fields to include, and what order to present them in, you are able to design a report that will provide you with the information you need in a format that is comfortable to you and may even be exported and integrated with other software.

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1

Once you have your report parameters set up, you can access to your reports when EDI Status reports are next generated from claims submitted.

When you are logged into the **Service Center** in the Office Ally website, click on the **Download File Summary** link on the menu on the left.

When you are logged into **Practice Mate** in the Office Ally website, go to the **Claims/Billing** tab and hover on the **Reports** link. Choose **Download File Summary** from the menu.
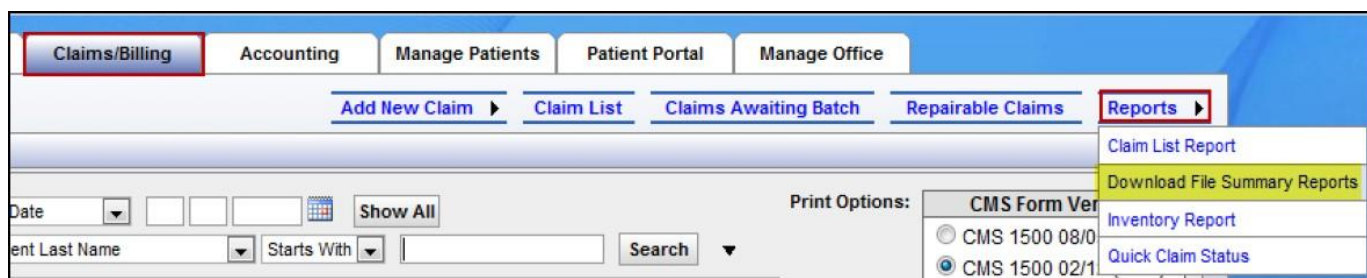
In either program, you see a calendar. Click on one of the PINK dates, which indicate a report waiting to be looked at.
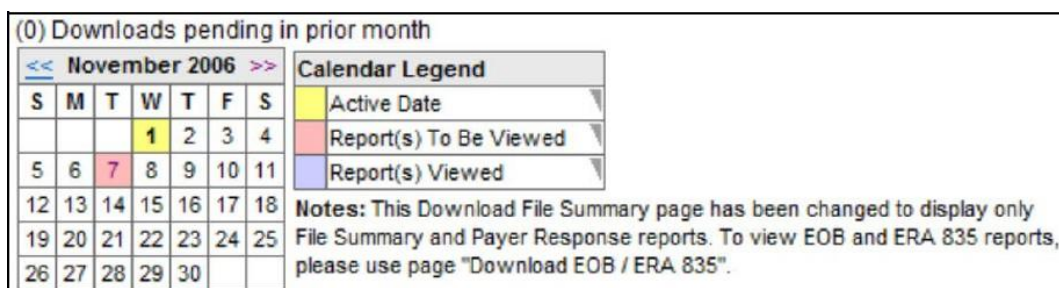
Below that, the reports available for that day are listed as usual.

Payer	Form Type	File ID	File Name	#Accepted	#Pending	#Failed	Total	Download/View
MULTI	Payer Response	233794975	233794975_EDI_STATUS_20150213_test.csv	0	0	1	1	VIEW
MULTI	Payer Response	233794974	233794974_EDI_STATUS_20150213_test.txt	0	0	1	1	VIEW

In the Filename column, you will now see two types of files, the standard text (.txt) file and your Custom CSV (.csv) file. In the **Download/View** column, you can click the **VIEW** link to download and view the file. Choose to Open or Save the file (whichever you choose) and then you can view it and/or print it.

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2

The Custom CSV EDI Status Report will open in a CSV formatted spreadsheet in Excel, with the fields you selected in your setup as the column headers. As with all Excel formats, you may use the Excel tools to sort and arrange your data as you choose to.

The Custom CSV EDI Status Report contains the claims included in the EDI Status Report is represents and will contain the columns you chose previously in the setup step. The status of the claim will be displayed in the Claim Status column (if you have elected to have that column included in the report).

Error messages are listed in the **Payer Respond Message** column (if you have elected to have that column included in the report).

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3