

Kofax Export Connector 8.1.0 for Medical Claims

Administrator's Guide



© 2012 Kofax, Inc., 15211 Laguna Canyon Road, Irvine, California 92618, U.S.A. All rights reserved. Use is subject to license terms.

Third-party software is copyrighted and licensed from Kofax's suppliers.

THIS SOFTWARE CONTAINS CONFIDENTIAL INFORMATION AND TRADE SECRETS OF KOFAX, INC. USE, DISCLOSURE OR REPRODUCTION IS PROHIBITED WITHOUT THE PRIOR EXPRESS WRITTEN PERMISSION OF KOFAX, INC.

Kofax, the Kofax logo, and the Kofax product names stated herein are trademarks or registered trademarks of Kofax, Inc. in the U.S. and other countries. All other trademarks are the trademarks or registered trademarks of their respective owners.

U.S. Government Rights Commercial software. Government users are subject to the Kofax, Inc. standard license agreement and applicable provisions of the FAR and its supplements.

You agree that you do not intend to and will not, directly or indirectly, export or transmit the Software or related documentation and technical data to any country to which such export or transmission is restricted by any applicable U.S. regulation or statute, without the prior written consent, if required, of the Bureau of Export Administration of the U.S. Department of Commerce, or such other governmental entity as may have jurisdiction over such export or transmission. You represent and warrant that you are not located in, under the control of, or a national or resident of any such country.

DOCUMENTATION IS PROVIDED "AS IS" AND ALL EXPRESS OR IMPLIED CONDITIONS, REPRESENTATIONS AND WARRANTIES, INCLUDING ANY IMPLIED WARRANTY OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE OR NON-INFRINGEMENT, ARE DISCLAIMED, EXCEPT TO THE EXTENT THAT SUCH DISCLAIMERS ARE HELD TO BE LEGALLY INVALID.

Contents

Legal Notice	2
Administrator's Guide	5
Overview	5
Related Documentation	5
Training	6
Getting Help for Kofax Products	6
Installing the Export Connector	7
Removing the Export Connector	7
Repairing the Export Connector	8
Setting Up the Export Connector	8
Export Processing	9

Administrator's Guide

This document gives you information about installing and configuring Kofax Export Connector for Medical Claims, which is used to export Kofax Capture fields in industrial standard ANSI 837 format for CMS1500 and UB04 health care forms.

Standard Kofax Capture export connector setup is used to configure the EDI configurations, which are stored as custom properties and XML files.

The following diagram shows the basic workflow.

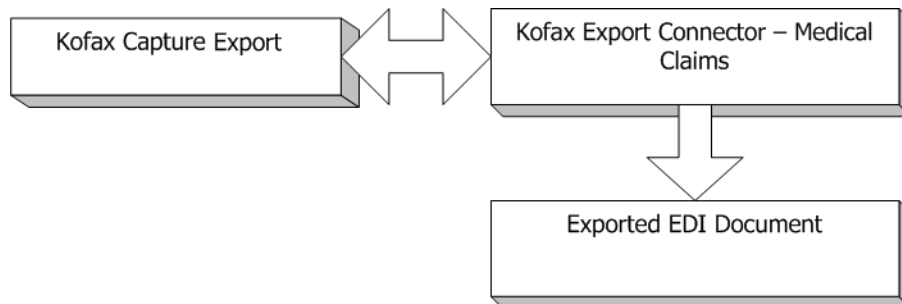


Figure 1. Basic Workflow

Overview

With the Kofax Export Connector for Medical Claims, batches are processed based on the Kofax Capture Export module settings for the associated batch classes. The Export module is responsible for exporting documents, as well as index data using the attributes defined during export setup.

The Kofax Capture Export module usually runs as an unattended module on a Windows workstation, periodically polling the Export module for available batches. The Export module may be configured to run during off-hours to avoid any impact to the throughput of Kofax Capture and/or the network system. When you start the Export module, all batches queued for export are processed.

Once a batch is exported, it is removed from Kofax Capture. If any documents or pages are rejected, the batch is routed to the Quality Control module. If successful, each document's item ID number appears in the Export module event log.

Related Documentation

Help for Kofax Export Connector for Medical Claims

Provides online assistance for system administrators and operators.

Kofax Export Connector for Medical Claims Release Notes

Includes late-breaking information about Kofax Export Connector for Medical Claims. You should read the release notes carefully, as they contain information that may not be included in other documentation.

Kofax Capture Installation Guide

Contains essential information about installing Kofax Capture and Kofax Capture Network Server.

This guide is for system administrators and developers who are installing Kofax Capture or Kofax Capture Network Server, or who need a description of the installation procedures and requirements.

Help for Kofax Capture

Provides online assistance for system administrators and operators.

Kofax Capture Release Notes

Includes late-breaking information about Kofax Capture. You should read the release notes carefully, as they contain information that may not be included in other Kofax Capture documentation.

Training

Kofax offers both classroom and computer-based training that will help you make the most of your Kofax Capture solution. Visit the Kofax Web site at www.kofax.com for complete details about the available training options and schedules.

Getting Help for Kofax Products

The support for Kofax Export Connector for Medical Claims differs from that of other Kofax products.

Kofax Technical Support is available for the following:

- Basic export connector installation
- Baseline product configuration to ensure that field mappings work in conjunction with Kofax Transformation Modules Medical Claims Add-on Pack

For changes or modifications to the installed configuration, contact Kofax Professional Services.

Please review the Kofax Cross Product Compatibility Matrix on the Kofax Support Web pages at <http://www.kofax.com/support> for additional details and version information.

Kofax regularly updates the Kofax Support site with the latest information about Kofax products.

To access some resources, you must have a valid Support Agreement with an authorized Kofax Reseller/Partner or with Kofax directly.

Go to <http://www.kofax.com/support> for:

- Access to product knowledge bases
Click **CAPTURE: SUPPORT KNOWLEDGE**.
- Access to the Kofax Customer Portal (for eligible customers)
Click **CAPTURE: SUPPORT INTERACTIONS** and log in.
To optimize your use of the portal, go to the Kofax Customer Portal login page and click the link to open the *Guide to the Kofax Support Portal*. The guide describes how to access the portal, what to do before contacting the support team, how to open a new case or view an open case, and what information to collect before opening a case.
- Product information and release news
Click **Product** and select a product name and version.
- Downloadable product documentation
Click **Documentation** and select a product name and version.
- Access to support tools
Click **Tools** and select the tool to use.
- Information about the support commitment for Kofax products
Click **Options** and select **Kofax Support Commitment**.

Use these tools to find answers to questions that you have, to learn about new functionality, and to research possible solutions to current issues.

Installing the Export Connector

You can install Kofax Export Connector for Medical Claims on a Kofax Capture client or standalone workstation.

To install Kofax Export Connector for Medical Claims successfully, you must have Windows administrator privileges and User Account Control (UAC) must be turned off.

- 1 If an earlier version of the export connector is installed on your workstation, remove it.
- 2 On the Kofax Capture installation media, locate and run `Kofax Export Connector for Medical Claims.msi`.
The installation wizard appears.
- 3 Click **Next** and follow the instructions on the screen to install the export connector.
- 4 When you are notified that the installation is complete, click **Finish**.
- 5 Repeat the installation procedure on all Administration and Export workstations that will use Kofax Export Connector for Medical Claims.

Kofax Export Connector for Medical Claims is automatically registered with Kofax Capture and available to assign to document classes. See [Setting Up the Export Connector](#) or refer to the Kofax Capture documentation.

Removing the Export Connector

Use the following procedures to remove the export connector from Kofax Capture and from your computer.

Removing the Export Connector from a Batch Class

- 1 In the Kofax Capture Administration module, on the Batch tab, expand the batch class to view associated document classes.
- 2 Right-click the applicable document class, and select **Export Connectors**.
- 3 On the Assigned Export Connectors list, select the export connector and click **Remove**.

Removing the Export Connector from the Export Connector Manager

- 1 In the Kofax Capture Administration module, do one of the following:
 - For Kofax Capture 10: On the Tools tab, in the System group, click **Export Connectors**.
 - For Kofax Capture 9: On the Tools menu, select **Export Connector Manager**.
- 2 In the Export Connector Manager window, select the export connector, and click **Remove**.

Removing the Export Connector from the Computer

You can use the Control Panel options to remove the export connector, or you can follow these instructions:

- 1 Run the `.msi` file that you used to install the export connector.
When the existing installation is detected, the Application Maintenance window appears.
- 2 Select **Remove**, and then click **Next**.
- 3 Follow the on-screen instructions to remove the export connector.
When the removal is complete, a message appears to indicate the export connector was successfully removed.

Repairing the Export Connector

You can use the repair process to replace missing, renamed, or deleted export connector files.

- 1 Run the `.msi` file that you used to install the export connector.
When the existing installation is detected, the Application Maintenance window appears.
- 2 Select **Repair**, and then click **Next**.
- 3 Follow the on-screen instructions to repair the export connector.
When complete, a message appears to indicate the export connector was successfully repaired.

Setting Up the Export Connector

After you have associated a document class with a batch class in Kofax Capture, set up the export connector for exporting your images, documents, and index data.

- 1 Start the Kofax Capture Administration module.
- 2 On the Definitions panel, click the **Batch** tab.

- 3 Select a batch class and expand it to view the associated document classes.
- 4 Right-click the applicable document class, and then click **Export Connectors**.
The Export Connectors window appears.
- 5 On the Available Export Connectors list, select **Medical Claims** and click **Add**.
Your selection is moved to the Assigned Export Connectors list, and the Kofax Export Connector for Medical Claims Setup window is opened automatically.
- 6 On the setup window, configure the settings on each tab. Click **Help** on any tab for details about individual settings.
- 7 When you finish with the setup window, click **OK**.
Information messages display a list of changes to the settings and the custom properties.
- 8 Click **OK** to clear the information messages and return to the Export Connectors window.

Export Processing

When you associate the Kofax Export Connector for Medical Claims export connector with a document class, associated batch classes are exported as EDI documents with the settings you configure. The export connector performs the following functions.

Open Script

In the Open Script function, the export starts the logger object. It creates the EDI file in the working folder, and then sets the Name/Value field's collection object. The collection consists of all linked and unlinked fields in Kofax Capture. This collection is used by the field mappings control to process any field translations. This is called once per batch class.

ReleaseDoc

The export connector uses the Name/Value pairs collection, which is passed to the data translations, field mappings and feed output mappings to translate the data as defined in the mappings. Based on the population of custom fields, the feed file is created.

CloseScript

After the document has successfully exported with no error messages, the batch is finalized with the CloseScript method. The logout function is called.

