

CLAIMS CONNECTIVITY GUIDE

**Choosing how your organization sends claims to
Trillium and receives 835 files**

*Unified Claims System | Claims Submission Setup
For Tailored Plan Providers Completing iTransact Onboarding*



Trillium
HEALTH RESOURCES

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Start here: www.trilliumprovideronboarding.org

Tab 3 (Accounts) of the onboarding form asks how your organization will send claims to Trillium. This guide explains each of those choices in plain terms so you can answer them correctly the first time. Use it alongside the Provider onboarding guide, which covers training, ID and the Trading Partner Agreement.

WHO THIS GUIDE IS FOR

This guide is for Tailored Plan contracted providers completing provider onboarding for iTransact. It covers the claims questions on Tab 3 (Accounts) of the enrollment form:

- Which access your organization needs
- Whether you use a clearinghouse
- Whether you use a third-party biller
- Where your 835 files should go

For everything else in onboarding, including the required training, ID upload and the Trading Partner Agreement, follow the Provider onboarding guide.

EVERY PROVIDER COMPLETES ONBOARDING

This includes providers that use a clearinghouse and never plan to sign in to iTransact.

Onboarding puts a signed Trading Partner Agreement on file and tells Trillium who you are. Without it, Trillium cannot match your claims to your organization, route your 835 files back to you or know where to send your electronic payments.

If your clearinghouse submits claims for you, you still complete onboarding one time. You just request no portal or file transfer access. Section 4 explains how.

TERMS YOU WILL SEE ON THE FORM

Many of the questions on this tab depend on a few terms that providers often use in different ways. Here is what each one means on the Trillium form.

Term	What it means on this form
837 file	The standard electronic file used to submit healthcare claims. Most billing software can create one.
835 file	The electronic remittance file Trillium sends back after claims are processed. It shows what was paid, denied, or adjusted.

Term	What it means on this form
iTransact Portal	Trillium's web portal. You sign in and manually enter CMS1500 or UB04 claims directly through a web form. It does not accept 837 file uploads.
HSP SFTP	A secure file transfer location for sending 837 files. This is not a web portal. You place 837 files in your inbound folder , and your 835 files appear in your outbound folder . HSP is the name of the vendor product Trillium uses to process claims files. You would use SFTP software for this access, or you could use the Trillium SFTP web Portal to upload files.
Clearinghouse	On this form, only four companies are available: Availity, Optum, SSI and Rubicon . These are the 4 clearinghouses Trillium has contracts with.
Third-party biller	Any company that handles billing for you and is not one of the four defined clearinghouses indicated above. Many providers call their billing company a clearinghouse. On this form, Trillium treats it as a third-party biller.

ITRANSACT IS A WEB PORTAL ONLY

iTransact works differently from Provider Direct. Provider Direct lets you upload EDI files. iTransact does not.

If your organization wants to send 837 EDI files to Trillium itself, you need **HSP SFTP** access. If you have been asking for direct EDI upload, HSP SFTP is what you need.

CHOOSE YOUR PATH

WHAT HAPPENS TO THE REST OF YOUR BILLING TEAM

Most providers fit one of three paths. Find yours here, then use section 4 to complete each question on the form.

If your organization...	Access request type	Are you using a clearinghouse?
Path A: Sends claims through Availity, Optum, SSI or Rubicon	No access needed (add iTransact Portal only if you want to use the portal for checking member eligibility, enter prior authorization request, check claim status, etc.)	Yes, then select your clearinghouse
Path B: Sends its own 837 files, or uses a billing company or clearinghouse that is not on Trillium's list	HSP SFTP (add iTransact Portal if you also want the portal for checking member eligibility, enter prior authorization request, check claim status)	No
Path C: Enters a small number of claims by hand	iTransact Portal	No

You can request both HSP SFTP and iTransact Portal. For example, you might upload claims in bulk through HSP SFTP and use the portal to look up claim details.

Entering claims one at a time in iTransact works, but it is slow for anything more than a handful of claims. If your organization bills in volume, Path A or Path B will serve you better.

ANSWERING THE CLAIMS QUESTIONS

Tab 3 (Accounts) asks these questions in the order below. Next to Access request type there is an information icon. Hover over it for a short description of each option.

IS THIS YOUR FIRST REQUEST FOR HSP SFTP ACCESS?

This question helps Trillium's team on the back end. **It does not change what access you receive**, and a wrong answer will not stop or delay your submission. Trillium checks every submission and corrects this if needed.

- If you are not sure, choose either answer. You do not need to contact Trillium first.
- Trillium looks at this question by organization (EIN and NPI), not by person.
- If someone at your organization already has HSP SFTP access, Trillium may ask you to get access through that person instead of creating a new account. If that person has left your organization, tell us and Trillium can move the account to the new contact.

ACCESS REQUEST TYPE

This question is required, and it is the one that decides what access you receive. If you do not select an option here, you will not receive that access, even if you answered yes to the question above.

Option	Select it if...
HSP SFTP	Your organization, or a biller working under your organization's credentials, will upload 837 files and can view/receive 835/RA remittance advices via SFTP. This option would use SFTP software or the Trillium SFTP Web Portal.
iTransact Portal	Someone at your organization will sign in to the web portal. Trillium will email portal credentials. You cannot upload 837 via iTransact. You must select HSP SFTP.
No access needed	A listed clearinghouse sends all of your claims and no one at your organization needs access to the iTransact portal for any other business function nor do they need HSP SFTP.
Other options	These are for other Trillium line of business. If you are onboarding only for Tailored Plan and Physical Health claims, leave them unselected.

IF YOU DO NOT SEE **[NO ACCESS NEEDED]** OPTION

Trillium is adding this option to the form. Until it appears, select **HSP SFTP** if you use a listed clearinghouse and need no other access.

Because you will also select your clearinghouse, your files route through that clearinghouse. You will not receive separate HSP SFTP credentials.

If you use a listed clearinghouse and select HSP SFTP anyway, that causes no problem. Trillium routes your files through your clearinghouse. Selecting iTransact Portal is different: you will receive portal credentials by email, so select it only if you want to use the portal.

ARE YOU USING A CLEARINGHOUSE?

- **Answer yes only if you use Availity, Optum, SSI or Rubicon.** Then select it from the list.
- If your billing company is anyone else, **answer no**, even if that company calls itself a clearinghouse.
- If you answer no, go back to Access request type and confirm you selected HSP SFTP (Path B) or iTransact Portal (Path C).

IF YOUR CLEARINGHOUSE OR BILLER IS NOT ON THE LIST

You have two options.

1. **Ask your billing company to partner with one of Trillium's four clearinghouses.** That arrangement is between those two companies. Once it is in place, your claims can reach Trillium through that clearinghouse.
2. **Send files to Trillium yourself through HSP SFTP.** Answer no to the clearinghouse question and select HSP SFTP as your access request type.

Trillium issues HSP SFTP credentials to your organization. Trillium does not contract with third-party billers, so it cannot issue credentials to them directly. How your organization manages its credentials after that, including whether your biller uploads files for you, is your organization's decision.

THIRD-PARTY BILLERS

The form names two third-party billers: **HHAX** and **WebbMason**. Most billers are not listed. If yours is not listed, leave this blank.

- **HHAX:** If you use HHAX for electronic visit verification (EVV), select it. This tells Trillium how to process those claims and send a copy of your 835 to your provider folder.
- **WebbMason:** WebbMason works with Trillium on paper claims only. It scans paper claim forms for providers that cannot submit electronically and sends them to Trillium. Select it only if you submit paper claims through WebbMason. If you use a clearinghouse, do not select WebbMason.

WHERE YOUR 835 FILES GO

This question asks whether Trillium should send your 835 files to your clearinghouse and your own outbound folder, or only to your outbound folder.

Your setup	If you answer yes	If you answer no
Clearinghouse only	Your clearinghouse and your outbound folder	Your outbound folder only
Clearinghouse and HHAX	Your clearinghouse, HHAX and your outbound folder	HHAX and your outbound folder

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Clearinghouse only	Your clearinghouse and your outbound folder	Your outbound folder only
Clearinghouse and HHAX	Your clearinghouse, HHAX and your outbound folder	HHAX and your outbound folder

If you answer no, your clearinghouse does not receive your 835 files. If your clearinghouse needs them to post payments, claims reconciliation or work denials, answer yes.

COMMON SCENARIOS

Use these examples to check your answers before you submit.

WE USE AVAILITY AND NEVER SIGN IN TO ITRANSACT

Availity sends all of our claims. No one on our team will use the portal.

Form question	Your answer
Complete onboarding?	Yes, one time
Access request type	No access needed
Using a clearinghouse?	Yes, select Availity
Third-party billers	Leave blank
835 files	Yes, if Availity needs your 835 files

WE USE RUBICON, AND HHAX FOR EVV

Rubicon sends our claims. We also use HHAX for electronic visit verification.

Form question	Your answer
Access request type	No access needed, or iTransact Portal if you want the portal
Using a clearinghouse?	Yes, select Rubicon
Third-party billers	Select HHAX
835 files	Yes. Your 835 files go to Rubicon, HHAX and your outbound folder.

OUR BILLING COMPANY CALLS ITSELF A CLEARINGHOUSE, BUT IT IS NOT ON THE LIST

We pay an outside company to handle our billing. It is not Availity, Optum, SSI or Rubicon.

Form question	Your answer
Access request type	HSP SFTP (add iTransact Portal if you want it)
Using a clearinghouse?	No

Form question	Your answer
Third-party billers	Select HHAX or WebbMason only if they apply. Otherwise leave blank.
After approval	Your organization receives HSP SFTP credentials and decides who uses them. Or ask your billing company to partner with one of the four listed clearinghouses.

OUR OWN BILLING SOFTWARE CREATES 837 FILES

We bill in-house and want to send our files directly to Trillium.

Form question	Your answer
Access request type	HSP SFTP (add iTransact Portal if you want it)
Using a clearinghouse?	No
How it works	Place 837 files in your inbound folder. Your 835 files appear in your outbound folder after processing.

WE SUBMIT ONLY A FEW CLAIMS A MONTH

We have no billing software and enter claims by hand.

Form question	Your answer
Access request type	iTransact Portal
Using a clearinghouse?	No
How it works	Sign in to iTransact and enter each claim through the web form.

WE HAVE MORE THAN ONE TAX ID

Our organization bills under several EINs, and one person manages billing for all of them.

Form question	Your answer
Complete onboarding?	Yes, once for each tax ID

Form question	Your answer
Email for HSP SFTP	Each HSP SFTP account needs its own unique email address. The file transfer system cannot create more than one account under the same email.
Good to know	The email address is needed to create the account. After that, access depends on the credentials, not on regular use of that inbox.

COMMON MISTAKES TO AVOID

- **Skipping onboarding because a clearinghouse handles your billing.** Trillium still needs your Trading Partner Agreement and needs to know who you are.
- **Answering yes to the clearinghouse question for a billing company that is not on the list.** Only Availity, Optum, SSI and Rubicon count.
- **Expecting to upload 837 files in iTransact.** iTransact is a web portal only. File uploads go through HSP SFTP.
- **Leaving HSP SFTP unselected when you plan to upload files.** Access request type decides what you receive.
- **Using the same email for HSP SFTP accounts under different tax IDs.** Each account needs its own email.
- **Selecting iTransact Portal when no one will use it.** You will receive portal credentials you do not need.
- **Answering no to the 835 question when your clearinghouse needs your 835 files.** Your clearinghouse will not receive them.

COMMON QUESTIONS

What is the difference between a clearinghouse and a third-party biller?

On this form, a clearinghouse is one of the four companies Trillium has contracts with: Availity, Optum, SSI and Rubicon. Any other billing company is a third-party biller, even if it calls itself a clearinghouse.

Our clearinghouse handles everything. Do we still need to complete onboarding?

Yes. Onboarding puts your Trading Partner Agreement on file and tells Trillium who you are, so we can route your 835 files and payments correctly. You complete it one time and request no access.

Can I upload 837 files in iTransact?

No. iTransact is a web portal for entering claims manually, one at a time. To upload 837 files, request HSP SFTP access.

What happens if I answer the first question wrong?

Nothing on your side. Trillium checks every submission and corrects this on the back end. If you are not sure, pick either answer.

I use a listed clearinghouse but selected HSP SFTP. Is that a problem?

No. Trillium routes your files through your clearinghouse.

Can our third-party biller get its own credentials from Trillium?

No. Trillium does not contract with third-party billers, so it issues credentials only to your organization. What your organization does with those credentials is its decision.

Do I need a different email for each tax ID?

Yes, for HSP SFTP. Each account must be tied to a unique email address.

I already have Provider Direct access. Do I still need this?

Yes. Provider Direct access does not carry over to iTransact or HSP SFTP. Tailored Plan claims require this onboarding.

GETTING HELP

Trillium's Provider Onboarding Support team can help with access questions, form choices and technical issues.

A contact form is available on every page of the onboarding portal. Each submission automatically creates a Help Desk ticket, so your question is tracked and routed to the right team.

- Complete every field marked with a red asterisk.
- **Double-check your email address.** It is how we reach you.
- **Use the current status dropdown.** Choosing the closest option routes your question faster.
- Attach a screenshot if it would help explain your question.

Questions about this guide? Use the contact form at www.trilliumprovideronboarding.org.