

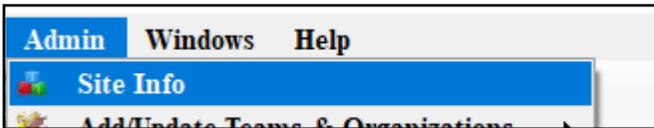
# ATS — Wellfleet Insurance Interface

The interface with Wellfleet was included in ATS so submissions could be streamlined. This document shows you how to configure ATS for these submissions and what is stored in ATS after the submission is complete.

**\*\* Make sure you mark the “primary” insurance company on the athlete info; “Payor #” = 1. This can be done manually or when the athlete is doing their registration in the portal.**

We also recommend setting require fields to ensure that the necessary information is entered both by athlete and staff for the injury claims. For more info check out the [Required Fields](#) doc.

Under the Admin—>Site Info screen; on the “Claims/EDI” tab. We always recommend communicating with your Wellfleet claims handler where the claim should be sent. Unless differently told, it should be **sports@wellfleetinsurance.com**



If not already enabled, do make sure you activate the Enable Claim Submission box for your database.

A screenshot of the 'Site Info - Joe Tech' configuration window, specifically the 'Claims/EDI' tab. The 'Enable Claim Submissions' checkbox is checked. The 'AG Administrators' field contains 'joe@kefferdevelopment.com'. Below this, there are fields for 'Host Name', 'Tgt Folder', 'User', 'Pw', 'Port', and 'Partner Code'. A 'Standard EDI' button and a 'Clear EDI' button are visible. Several insurance providers are listed with their email addresses: 'Bob McCloskey' (joe@kefferdevelopment.com), 'First Agency' (joe@kefferdevelopment.com), 'NAHGA' (joe@kefferdevelopment.com), 'Commercial Travelers' (joe@kefferdevelopment.com), 'Wellfleet Email(s)' (joe@kefferdevelopment.com), and 'Student Assurance Services' (joe@kefferdevelopment.com). The 'Wellfleet Email(s)' field is highlighted with a red box. A black banner at the bottom states: 'If using multiple email addresses they must be separated by a semi-colon'. 'Save' and 'Close' buttons are at the bottom.

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## User Profile:

**Be sure to allow access to submit/print claims for those staff members that will need to submit claims.**

This can be found on the Modules tab of the User Profile.

The screenshot shows the 'User' profile for 'Greg AT'. The 'Modules' tab is selected, and the 'Allowed to Submit/Print Claims' checkbox is checked. Other options include 'No Report Access', 'Allow Report Printing', 'User can See All Injuries on the Athlete Details Screen', 'Email Groups', 'Email/Opt', 'Administrator', 'Secure Msg', 'Notes', and 'MSC Forms'.

Also while in the user profile, ensure that there is a signature assigned for the user. The users signature will be automatically placed on the claim form. You can generate an automated signature or upload your own from an image file.

The screenshot shows the 'Signature' section with a handwritten signature in a blue box. Buttons for 'Generate', 'Upload', and 'Clear' are visible. Above the signature field are fields for 'Phone/Location', 'Email Signature', 'Home Address', and 'Reset Login Info'.

## Insurance Specific Information:

In addition to the insurance information, as well as the policy holder information being completed, please indicate on the emergency contact screen the employed status and employer.

The screenshot shows the 'Emergency' contact screen for 'annie'. The 'Employed' checkbox is checked, and the 'Employer Name' field is filled with 'Keffer Development'. Other fields include 'Name', 'Email', 'Phone', 'Relation', 'Text Number', 'Work Phone', 'Login', 'Employer Address', 'Employer City', 'Employer State', 'Employer Zipcode', and 'Force PW'.

The screenshot shows the 'Athlete Insurance - Davis, Crash' screen. The 'Policy Holder Information' section is highlighted with a red box. It includes fields for 'Name' (Jimmy Davis), 'DOB' (1/1/1960), 'Gender' (Male), 'SSN' (145-67-8941), 'Street' (62 Hartwell Circle), 'C/S/Z' (Sometown PA 16227), 'Phone', 'Policy Holder Relation' (Child), 'Signature on file', and 'Employer Name' (Keffer Development).

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Prior to submitting a claim, you will need to create the injury, complete the Injury Desc/How box on the injury screen, as well as complete the SAS specific note.

Complete the injury screen, and add your notes as normal. Be sure to also keep track of all modalities, rehab activity and enter your notes, the Wellfleet claim will generate totals on the claim.

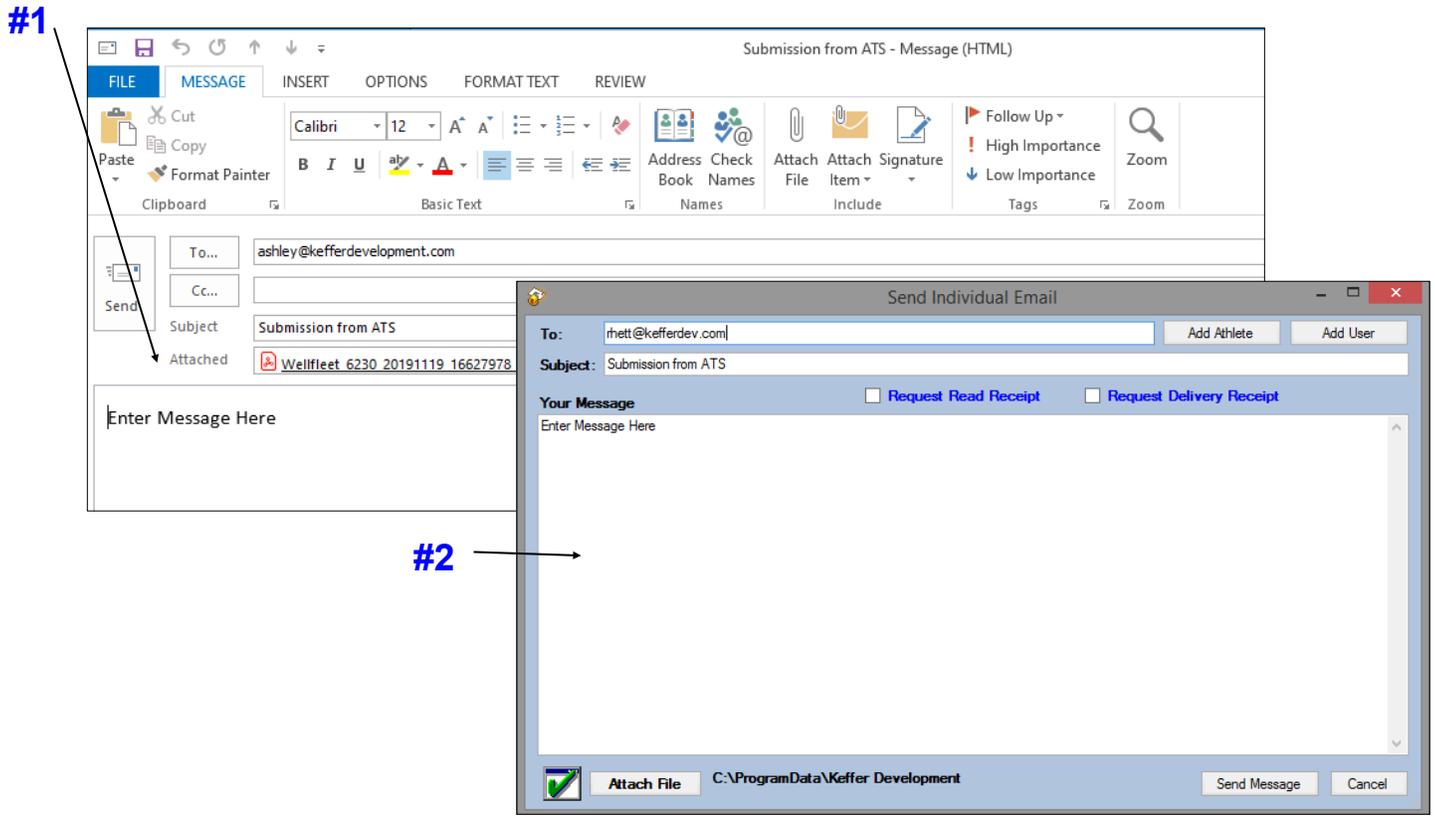
Add the Injury Description/how note.

To submit a claim, select "Wellfleet" from the "Claim For" list, then click the "Claim" button. Clicking this button sends an email to Wellfleet and adds an electronic document to the injury information.

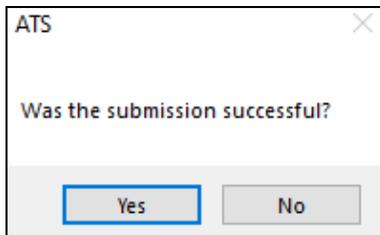
As part of the submission process you will be asked if you want to encrypt the submission with a password. We STRONGLY recommend using a password and coordinating this with your contact.

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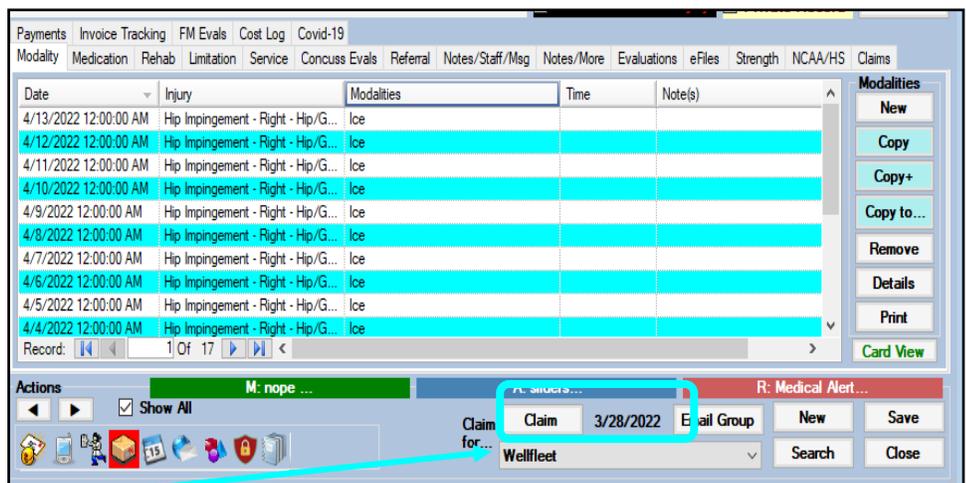
After clicking yes or no; if you are using MS-Outlook your claim will be attached to to an email (#1 below). If you are not using MS-Outlook the ATS email screen will be use (#2 below)



After sending your email. You will see the submission successful box populate.



After the submission the processes you will see the screen shown to the left. Answering "Yes" updates the submitted date for the injury.



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To see the claim that was sent:

1. Navigate to the documents tab on either the injury or athlete screens
2. Select the file
3. Click the “View” button.
4. The document will be displayed in the PDF viewer.

The screenshot displays the 'Injury - Davis, Crash' interface. The top section contains general injury information, including 'Name: Davis, Crash', 'Status: Current', and 'Body Part: Hip/Groin'. Below this, there are fields for 'Injured: 3/28/2022', 'Reported: 3/28/2022', and 'Rtn to Play: / /'. The 'Inj/III' section lists '1: Hip Impingement' and '2:'. The 'Side: Right' and 'MOI:' fields are also visible. The 'Athletic Trainer: Joe Streckfus' and 'Team: Joe Tech Men Baseball' are listed. The bottom section shows a table of documents with columns for 'Date', 'Doc Type', and 'Description'. A single entry is shown: '3/28/2022 0 Wellfleet Submission'. To the right of the table is a vertical menu with buttons for 'New', 'Remove', 'Details', 'View', 'Print List', and 'Card View'. The 'View' button is highlighted with a red arrow. The bottom of the interface features an 'Actions' bar with a 'Show All' checkbox and a 'Claim for...' dropdown menu set to 'Wellfleet'.

Date	Doc Type	Description
3/28/2022	0	Wellfleet Submission

**Note**  
Full-size example on next page

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Plan Administered by:



## WELLFLEET

### Student Accident Report

PO Box 15369  
Springfield, MA 01115-5369

For Toll-free Policyholder Service 1-877-657-5039

#### School Report:

Name of College or University: Joe Tech

Name of Student: Davis, Crash

Gender: PND

College Address: 62 Hartwell Circle

Sometown, PA 16227

Home Address: 24 Village Park Drive

Grove City PA 16127

Date of Birth: 01/14/1998

Email Address: joe@kefferdevelopment.com

Cell Phone No: +34 655978569

Student's ID No: 74741

Circumstance:

Accident Date: 03/28/2022

Nature of - Details of What Happened:

Date of First Treatment: 03/28/2022

Previous trouble with this condition (re-injury): No

Body Part Injured: Hip/Groin

Left/Right: Right

Type of Injury: Hip Impingement

Name of Sport: Joe Tech Men Baseball

Name of School Official or Coach Supervising activity: Joe Streckfus

#### INSURANCE INFORMATION

Does the claimant have primary insurance? Yes

Insurance Company Name & Address

Blue Cross Blue Shield

Philadelphia pa 74125

Policy Number:

ID# 852369741

Policy Holder Name: Jimmy Davis

I hereby certify that I have read the answers to all parts of this form and to the best of my knowledge and belief the information is complete and correct as given herein .

Any person who includes any false or misleading information on an application or statement of claim for an insurance policy is subject to criminal and civil penalties.

Signature of College Official/Title

Date Signed: 03/28/2022

#### TREATMENTS

Modalities: 17

Rehabs: 16

Notes: