For Third-Party Administrators

If you're a Third-Party Administrator (TPA) seeking authorization to bulk upload claims-level data on behalf of a covered entity, follow the steps below to get set up in Truzo.

Step 1: Contact the Covered Entity Concierge Team

- To begin, contact the covered entity concierge team at truzo-support@modeln.com or gotruzo.com/contact.
- A representative will initiate your TPA account in Truzo and guide you through the setup process.

Step 2: Truzo Registration

- Once your TPA account is initiated, you will receive an invitation email to register. Accept the invitation and complete your account setup.
- Next, notify the covered entity that they must grant you upload permissions in Truzo. Detailed instructions on how they do so are below.
- After registration, your Truzo dashboard will display:
    - Covered entities that have granted you upload access.
    - Active data templates and data-field requirements.
    - The data dictionary and field specifications.

Important Reminder: Covered entities must grant a TPA access in Truzo before the TPA can submit claims on their behalf.

How Covered Entities Grant TPA Access in Truzo:

1. Navigate to "Team Management" from the left-hand navigation menu.
2. Select "TPA Management".
3. Click "Add New TPA".
4. Enter the TPA's designated primary user email address exactly as provided by the TPA.
5. Save your changes. Once added, the TPA will see your Covered Entity listed in their Truzo dashboard and will be authorized to upload claims on your behalf.

Step 3: SFTP Folder Set up

- After registration, the Kalderos team will provide documentation for accessing your secure SFTP folder. This folder is where you will bulk upload files on behalf of covered entities.

Step 4: Prepare and Upload Claims Data

- Once your account is active, the SFTP folder is configured, and the covered entity has granted you upload permissions, you're ready to submit claims data.
- **Option 1: Upload using a Truzo template**
    - Download and complete the appropriate Truzo template, then upload the file directly to your secure SFTP folder.
- **Option 2: Use your own file format**

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- If you're using your own file format:
  - Select "Create a mapping"
  - Upload the file containing the header names from your exported data.
  - Map Truzo's required fields to the corresponding columns in your file.
  - Save the mapping.
  - Upload the completed file to your secure SFTP folder.
- Truzo will validate the data and generate a log file identifying any errors or formatting issues. Review and correct any flagged records before your next upload.
- Once processed successfully, the claims data will be visible to the covered entity in Truzo, along with the results of any applicable eligibility checks.

Need help? Visit **https://gotruzo.com**, contact us at **gotruzo.com/contact**, or email us directly at **truzo-support@modeln.com**.

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