
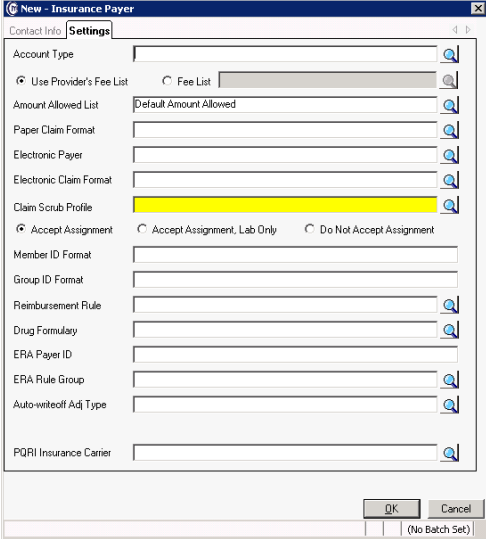


ADDING INSURANCE COMPANIES QUICK REFERENCE

Adding Insurance Companies	Notes
<ul style="list-style-type: none"> <input type="checkbox"/> 1. List Editor>Demographics>Insurance Plan <input type="checkbox"/> 2. Click the magnifying glass to search for a payer (The insurance company ex: BCBS) <input type="checkbox"/> 3. If the payer does not exist, Click New <input type="checkbox"/> 4. Adding a New Payer <input type="checkbox"/> Go to the Contact Info Tab <input type="checkbox"/> A. External ID= Leave Blank <input type="checkbox"/> B. Name= Name of Insurance Company ex: Cigna <input type="checkbox"/> C. Primary Contact= A contact at the insurance company (not required) <input type="checkbox"/> D. Secondary Contact = A second contact at the insurance company (not required) <input type="checkbox"/> E. Address= Leave Blank (you will enter the address in the plan file) 	<p>Insurance Payer= Main Company</p> <p>Insurance Plan= Individual Plans of the Main Insurance Company with different Addresses</p>
<ul style="list-style-type: none"> <input type="checkbox"/> Go to the Settings Tab <input type="checkbox"/> a. Account Type: Choose the best fit for this company <input type="checkbox"/> b. Leave Use Provider's Fee List Selected <input type="checkbox"/> c. Amount Allowed List: Leave as Default (we will change once we build all of the amount allowed schedules) <input type="checkbox"/> d. Paper Claim Format: Choose the best fit <input type="checkbox"/> e. Electronic Payer: Search for the correct payer from the list <input type="checkbox"/> f. Electronic Claim Format: Choose the best fit <input type="checkbox"/> g. Claim Scrub Profile: Choose the Default <input type="checkbox"/> h. The remaining line items can be left alone 	
	
<ul style="list-style-type: none"> <input type="checkbox"/> Click OK <input type="checkbox"/> Click the Hyperlink to access the new payer you just created <input type="checkbox"/> You are now back to the insurance plan tab and the new payer you just created should be listed as the Payer <input type="checkbox"/> Under the Contact Tab <input type="checkbox"/> Name= Name of the plan or can be the same as the insurance payer (ex: Medicare) 	

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- Uncheck use Payer's Address (since you did not add an address to the payer)
- Enter the Address and phone numbers for the plan

The screenshot shows a software window titled "New - Insurance Plan" with a "Settings" tab selected. The window contains the following fields and controls:

- Page:** A dropdown menu with a "New Payer" button and an "Inactive" checkbox.
- Name:** A text input field.
- Address:** A section with a checked checkbox "Use Payer's Address".
- Line 1:** A text input field with a search icon.
- Line 2:** A text input field with a search icon.
- City:** A text input field with a search icon.
- State:** A dropdown menu.
- Zip:** A text input field.
- Phone Number:** A text input field.
- Phone Type:** A dropdown menu with a search icon.
- Buttons:** "OK", "Cancel", and "(the Batch Set)" buttons at the bottom.

- Click the Settings Tab
- Leave all constraints pointing to the payer file
- Click OK