

Important Content Update Message

We are currently updating the OP Help Center content for the release of OP 20. OP 20 (official version 20.0.x) is the certified, 2015 Edition, version of the Office Practicum software. This is displayed in your software (**Help tab > About**) and in the Help Center tab labeled Version 20.0. We appreciate your patience as we continue to update all of our content.

Connecting Providers to Insurance Payers

Last Modified on 11/19/2019 12:12 pm EST

Version 14.19

Path: Billing tab > Payers





Overview


Once an Insurance payer has been entered into OP, all credentialed providers *must* be associated with the payer in order to generate a claim for that particular provider and payer combination. After a Provider's information has been entered once, it can easily be copied and applied to other payers.

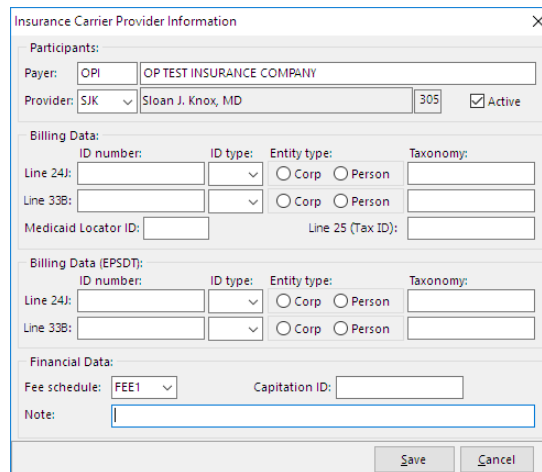
Associating a Provider with an Insurance Payer

1. Navigate to the Insurance Payers List.
2. Select the **Insurance Payer** for which you will associate a credentialed provider.
3. Click **+** to display providers associated with this payer. When a payer is first entered into OP, this list is blank.

OPI	OP INSURANCE	OP TEST INSURANCE COMPANY		
Prov	Provider Name	Provider ID	Practice ID	Active
<No data to display>				

4. Click the **Add** button  to associate a credentialed provider. The **Insurance Carrier Provider Information** window is displayed.
5. Complete the following fields as they are relevant to the billing requirements in your state.



- **Provider's Initials:** Select from the **Provider** drop-down menu.
- Select the **Active** checkbox.
- **Line 24J ID Number:** This is a Provider ID number issued by the selected insurance payer and assigned directly to the provider. It is displayed in box 24J.
- **Line 24J ID type:** (only to be populated if Line 24J ID Number has been populated) The most commonly used types for this field are:
 - 24: EIN/Federal Tax ID
 - G2: assigned by a commercial carrier
 - 1B: Blue Cross/Blue Shield numbers
 - 1D: Medicaid number
 - 1H: Champus/Tricare ID



Warning: Do not enter a National Provider ID (NPI) in this field. NPIs should only be entered in the Provider Directory.

- **Entity type:** As related to the information entered in the Line 24J field as assigned to either a person or a corporation (e.g., if it is a personal pin number, select **Person**; if it is a tax ID, select **Corporation**).
- **Line 33B ID Number:** Number assigned by the payer for use on HCFA line 33B. This is an identifier issued by the selected insurance payer and assigned directly to the Practice; if the Practice was not assigned an individual number by the payer, enter the Practice tax ID).
- **Line 33B ID type:** Select the type of number entered in 33B for identification. The most commonly used types for this field are:
 - 24 - EIN/Federal Tax ID
 - G2 - assigned by a commercial carrier
 - 1B - Blue Cross/Blue Shield numbers
 - 1D - Medicaid number
 - 1H - Champus/Tricare ID



Warning: Do not enter a National Provider ID (NPI) in this field. NPIs should only be entered

in the Provider Directory.

- **Entity type:** As related to the information entered in the Line 33B field as assigned to either a person or a corporation (e.g., if it is a personal pin number, select **Person**; if it is a tax ID, select **Corporation**).
- **Taxonomy:** See [Taxonomy Fields](#) for important warnings regarding populating Taxonomy Codes in these fields.
- **Line 25 (Tax ID):** Typically this field is left blank. An OP Implementation Specialist should be consulted prior to adding a Tax ID number in this field.



Note: Line 25 (Tax ID) is the first place OP looks when populating the Tax ID on claims. If this field is blank, OP defers to the Tax ID field of the Locations table. For more information on the order in which OP considers Tax ID for claims, visit [Tax ID Setup](#).

- **Capitation ID:** If patients on this insurance plan must be enrolled with your practice before receiving services, enter the payer-assigned Office ID that would appear in their insurance records.
 - **Locator Code:** Medicaid Locator Code; should be 3 numbers.
6. Click the **Save** button to save changes and return to the **Insurance Payers List** window.
 7. Repeat these steps as necessary for each associated provider for this payer.

Copying Credentialed Provider Records

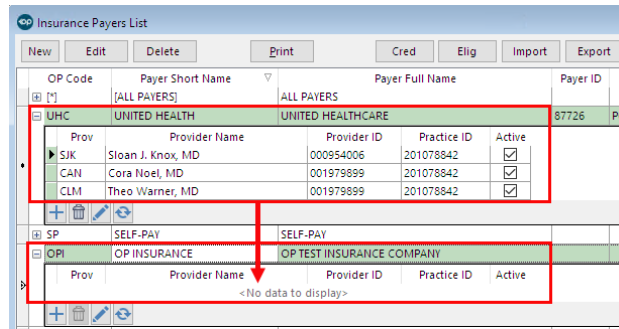
After entering a Provider's credentials once, it is easy to apply the same credentials to multiple payers. Note, the record is applied exactly as it is displayed in the record it is being copied from. If individual payers have assigned different Provider numbers, etc. it is necessary to edit the record once it has been applied to another payer. To copy credentials:

1. In the Insurance Payers List window, sort the payer list so that the record you are copying from is listed above the payer you are copying to.



Note: Because the Insurance Payers List is listed alphabetically, you may click the column header for the Payer Short Name column to change the listing from ascending to descending order in order to get the correct payer listed first.

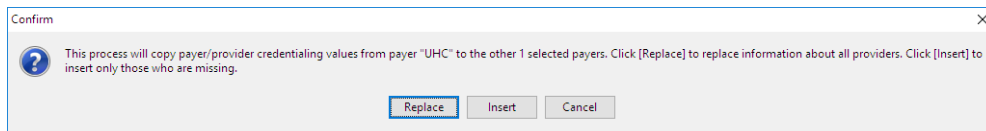
2. Select the **Payer** whose credentialed providers will be copied.
3. Click to select the **Payer(s)** who the credentialed providers will be copied to. In the screenshot below, United Health's credentialed Providers are going to be copied to OP Insurance Co.



OP Code	Payer Short Name	Payer Full Name	Payer ID
[*]	[ALL PAYERS]	ALL PAYERS	
UHC	UNITED HEALTH	UNITED HEALTHCARE	87726 PO
Prov	Provider Name	Provider ID	Practice ID
SJK	Sloan J. Knox, MD	000954006	201078842
CAN	Cora Noel, MD	001979899	201078842
CLM	Theo Warner, MD	001979899	201078842
SP	SELF-PAY	SELF-PAY	
OP	OP INSURANCE	OP TEST INSURANCE COMPANY	
Prov	Provider Name	Provider ID	Practice ID
<No data to display>			

Note: If the payers are listed one after another, use Shift on the keyboard to select all payers. If they are separated by other payers in the list, use CTRL on the keyboard and select each payer.

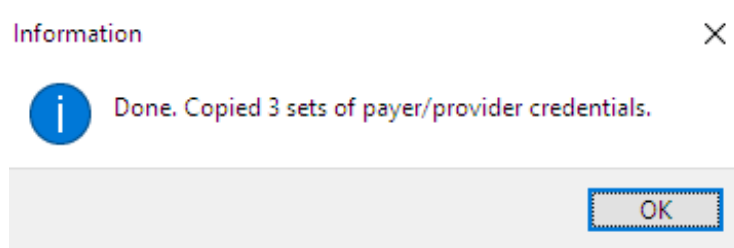
4. Click the **Cred** button. A confirmation dialog box is displayed that states the action OP is about to take.



5. Select from the following options:

- **Replace:** Replaces the information about all providers.
- **Insert:** Inserts only those providers who are missing.
- **Cancel:** Closes the Confirmation window and does not copy any records.

6. Review and click the **OK** button in the Information window that is displayed.




7. Review the credentialed Provider information that was copied into the Insurance Payer.

Insurance Payers List					
OP Code		Payer Short Name	Payer Full Name		Payer ID
[*]		[ALL PAYERS]	ALL PAYERS		
UHC		UNITED HEALTH	UNITED HEALTHCARE		87726 PO
Prov	Provider Name		Provider ID	Practice ID	Active
SJK	Sloan J. Knox, MD		000954006	201078842	<input checked="" type="checkbox"/>
CAN	Cora Noel, MD		001979899	201078842	<input checked="" type="checkbox"/>
CLM	Theo Warner, MD		001979899	201078842	<input checked="" type="checkbox"/>
+ - [edit] [refresh]					
SP		SELF-PAY	SELF-PAY		
OPI		OP INSURANCE	OP TEST INSURANCE COMPANY		
Prov	Provider Name		Provider ID	Practice ID	Active
SJK	Sloan J. Knox, MD		000954006	201078842	<input checked="" type="checkbox"/>
CAN	Cora Noel, MD		001979899	201078842	<input checked="" type="checkbox"/>
CLM	Theo Warner, MD		001979899	201078842	<input checked="" type="checkbox"/>
+ - [edit] [refresh]					


Disassociating a Provider from a Payer Record

If a claim has not been created for the Provider for a specific insurance, you are able to delete the Provider from this payer. If claims were submitted, the Provider can only be marked as Inactive in the Insurance Carrier Provider Information window.

Deleting a Provider from an Insurance Payer

1. Select the **Payer** for which the Provider is associated.
2. Click **+** to display the Providers associated with the Payer.
3. Click the **Delete** button  to remove the Provider from the Payer.

Inactivating a Provider from an Insurance Payer

1. Select the **Payer** for which the Provider is associated.
2. Click the **Edit** button .
3. Deselect the **Active** checkbox.
4. Click the **Save** button.


Version 14.8

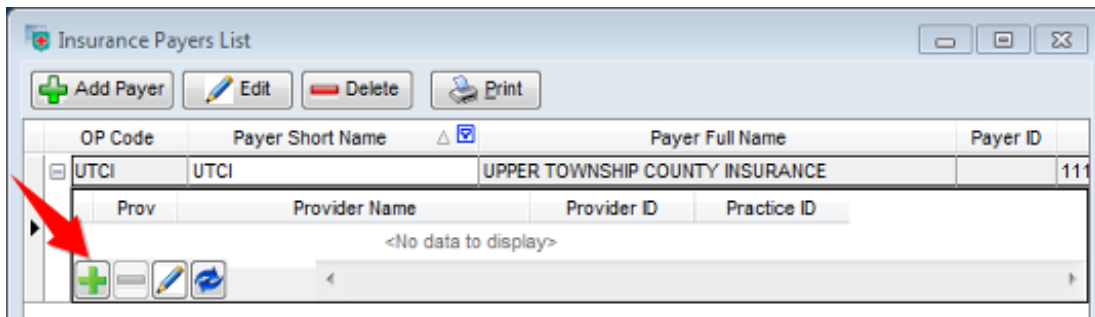
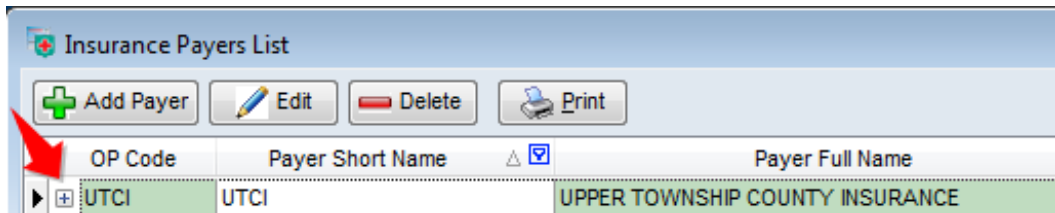
Utilities > Manage Practice > Insurance Payers

Overview

Once a payer has been entered into OP, all provider(s) *must* be associated with payer in the Insurance Payer List who they are credentialed with in order to generate a claim for a provider.


Creating an Associated Provider Record for an Insurance Payer

1. Open the Insurance Payers List.
2. Click the **Insurance Payer** to highlight it.
3. Click  at the left of the Insurance Payer Name. The list expands to display providers associated with this payer.




4. Click the **Edit** button to complete the following in the Insurance Carrier Provider Information window:
 - **Provider's Initials** - Select from the **Provider** drop-down menu.
 - Select the **Active** checkbox.
 - **Provider ID (Line 24J)** (optional) - Assigned by the payer; is displayed in box 24 J (this is an identifier issued by the selected insurance payer and assigned directly to the provider; if the provider was not assigned an individual number by the payer, enter the practice Tax ID).
 - **Type of Provider ID** (to the left of **Line 24J** field) - The most commonly used types for this field are:
 - 24 - EIN/Federal Tax ID
 - G2 - assigned by a commercial carrier
 - 1B - Blue Cross/Blue Shield numbers

- *1D* - Medicaid number
- *1H* - Champus/Tricare ID

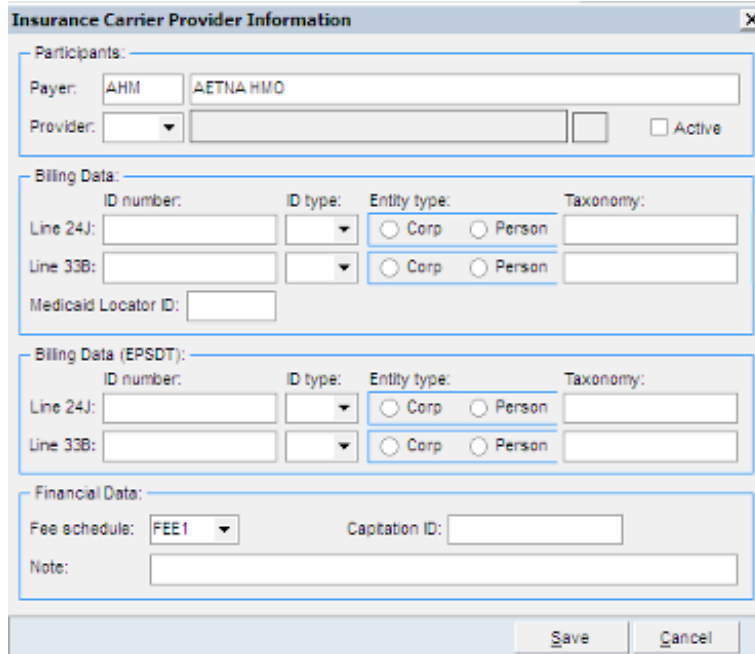
 DO NOT enter a National Provider ID (NPI) in this field. NPIs should only be entered on the Provider Directory.

- In the drop-down menu to the far right, further identify the number entered in the Line 24J field as assigned to either a person or a corporation (e.g., if it is a personal pin number, select **Person**; if it is a tax ID, select **Corporation**). Click the down arrow button and select from the drop-down menu accordingly.
- **Practice ID (Line 33B)** - Number assigned by the payer for use in line 33B (this is an identifier issued by the selected insurance payer and assigned directly to the practice; if the practice was not assigned an individual number by the payer, enter the practice tax ID).
- **Type of Practice ID** - Select the type of number entered in 33B for identification; most commonly used types for this field are:
 - *24* - EIN/Federal Tax ID
 - *G2* - assigned by a commercial carrier
 - *1B* - Blue Cross/Blue Shield numbers
 - *1D* - Medicaid number
 - *1H* - Champus/Tricare ID

 DO NOT enter a National Provider ID (NPI) in this field. NPIs should only be entered on the Provider Directory.

- In the drop-down menu to the far right, further identify the number entered in the Line 33B field as assigned to a person or a corporation (e.g., if it is a personal pin number, select **Person**; if it is a tax ID, select **Corporation**). Click the down arrow button and select from the drop-down menu accordingly.
- **Capitation ID (Optional)** - If patients on this insurance plan must be enrolled with your practice before receiving services, enter the payer-assigned Office ID that would appear in their insurance records.
- **Locator Code (Optional)** - Medicaid Locator Code; should be 3 numbers.

5. Click the **Save** button to save changes and return to the Insurance Payers List window.



Insurance Carrier Provider Information

Participants:

Payer: AHM AETNA HMO

Provider: Active

Billing Data:

ID number:	ID type:	Entity type:	Taxonomy:
Line 24J:	<input type="text"/>	<input type="radio"/> Corp <input type="radio"/> Person	<input type="text"/>
Line 33B:	<input type="text"/>	<input type="radio"/> Corp <input type="radio"/> Person	<input type="text"/>

Medicaid Locator ID:

Billing Data (EPSDT):

ID number:	ID type:	Entity type:	Taxonomy:
Line 24J:	<input type="text"/>	<input type="radio"/> Corp <input type="radio"/> Person	<input type="text"/>
Line 33B:	<input type="text"/>	<input type="radio"/> Corp <input type="radio"/> Person	<input type="text"/>

Financial Data:


Fee schedule: FEE1 Capitation ID:

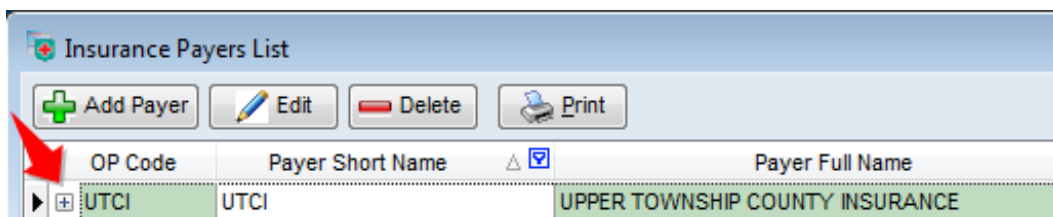
Note:

Save Cancel





Modifying an Associated Provider Record


From time to time, your office may need to edit a provider pin or group number, as identified by a payer:


1. Open the Insurance Payers List (**Utilities > Manage Practice > Insurance Payers > Insurance Carrier Provider Information**).
2. Click to highlight the **Insurance Payer** in question.
3. Click  to the left of the Insurance Payer Name. The listing expands, displaying associated providers for this payer.

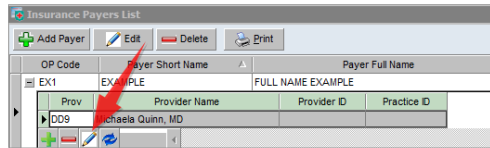


Insurance Payers List

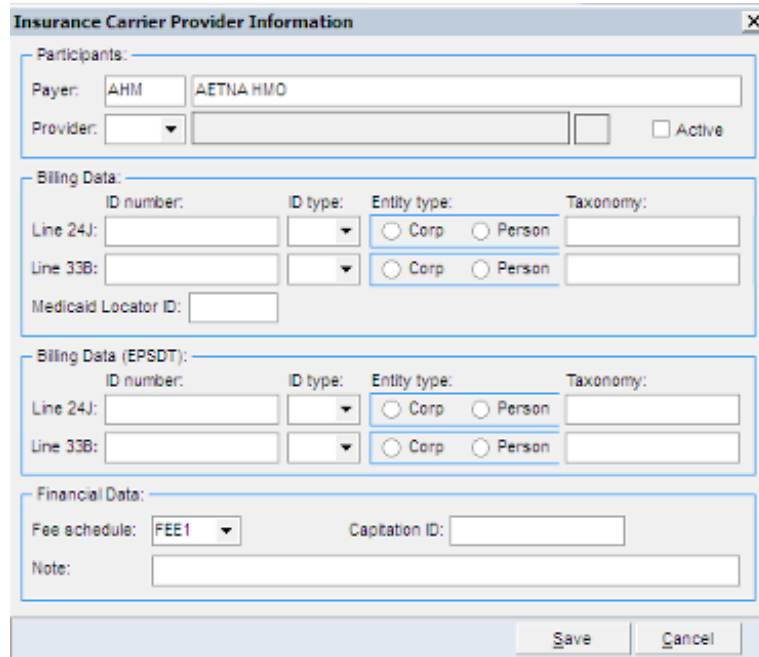
 Add Payer  Edit  Delete  Print

OP Code	Payer Short Name	Payer Full Name
 UTCI	UTCI	UPPER TOWNSHIP COUNTY INSURANCE

4. Click to highlight the associated **Provider** record you wish to edit.
5. Click the **Edit**  button in the small tool bar below the Associated Provider listings for this payer. The Insurance Carrier Provider Information window is displayed.



- In the Insurance Carrier Provider Information window, edit the fields as appropriate.
- Click the **Save** button at the bottom of the form to save changes and return to the Insurance Payers List window.



Insurance Carrier Provider Information

Participants:

Payer: AHM AETNA HMO

Provider: [dropdown] [input] Active

Billing Data:

ID number: [input] ID type: [dropdown] Entity type: Corp Person Taxonomy: [input]

Line 24J: [input] [dropdown] Corp Person [input]

Line 33B: [input] [dropdown] Corp Person [input]

Medicaid Locator ID: [input]

Billing Data (EPSDT):

ID number: [input] ID type: [dropdown] Entity type: Corp Person Taxonomy: [input]

Line 24J: [input] [dropdown] Corp Person [input]

Line 33B: [input] [dropdown] Corp Person [input]

Financial Data:

Fee schedule: FEE1 [dropdown] Capitation ID: [input]



Note: [input]

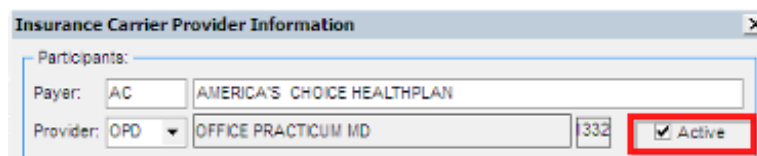
Save Cancel

Repeat these steps as necessary for each associated provider for this payer.

Disassociating a Provider from a Payer Record

If a claim has not been created for the provider for this insurance you are able to delete the provider from this payer. If claims were submitted, the provider can only be marked as Inactive.

- Follow the steps above to modify an associated provider record.
- Click the **Delete**  button to remove the provider from this payer.
- To Inactive a provider, click the **Edit**  button instead.
- Deselect the **Active** box.
- Click the **Save** button to exit.



Insurance Carrier Provider Information

Participants:

Payer: AC AMERICA'S CHOICE HEALTHPLAN

Provider: OPD OFFICE PRACTICUM MD 332 Active

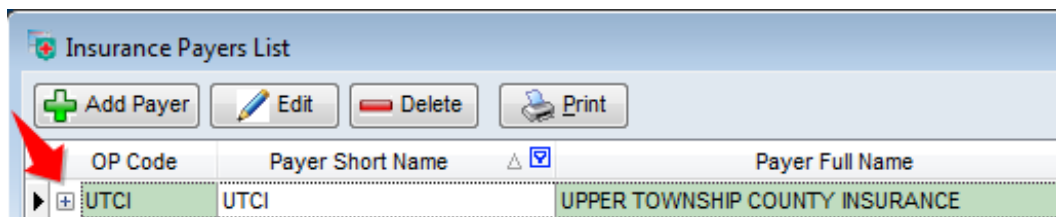
Utilities > Manage Practice > Insurance Payers

Overview

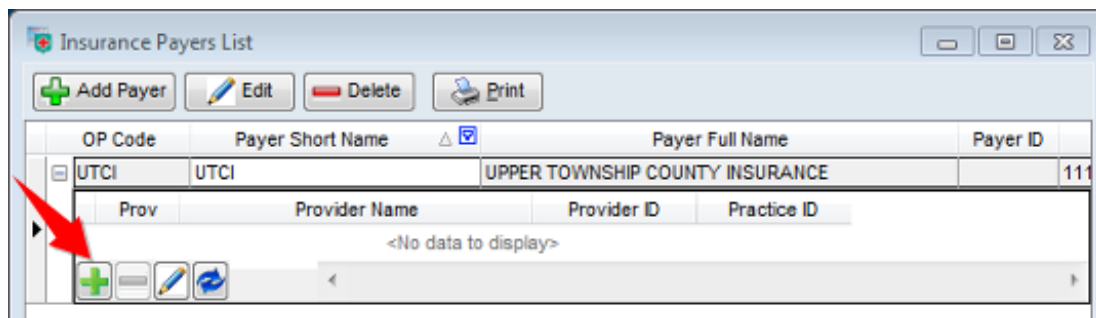
Once an Insurance payer has been entered into OP, all credentialed providers *must* be associated with the payer in order to generate a claim for that particular provider and payer combination. After a Provider's information has been entered once, it can easily be copied and applied to other payers.

Creating an Associated Provider Record for an Insurance Payer

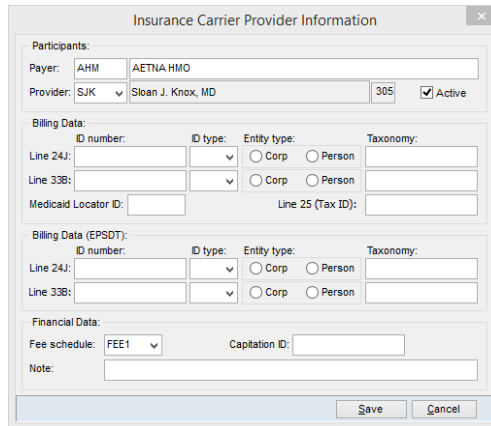
1. Navigate to the Insurance Payers List.
2. Select the **Insurance Payer** for which you will associate a credentialed provider.
3. Click + to display providers associated with this payer. When a payer is first entered into OP, this list is blank.




4. Click the **Add Record** button to attach a credentialed provider. The Insurance Carrier Provider Information window is displayed.




5. Complete the following fields as they are relevant to the billing requirements in your state.



- **Provider's Initials** - Select from the **Provider** drop-down menu.
- Select the **Active** checkbox.
- **Provider ID (Line 24J)** (optional) - Assigned by the payer; should be displayed in box 24 J (this is an identifier issued by the selected insurance payer and assigned directly to the provider.)
- **ID type** (to the left of **Line 24J** field) - The most commonly used types for this field are:
 - 24 - EIN/Federal Tax ID
 - G2 - assigned by a commercial carrier
 - 1B - Blue Cross/Blue Shield numbers
 - 1D - Medicaid number
 - 1H - Champus/Tricare ID

 DO NOT enter a National Provider ID (NPI) in this field. NPIs should only be entered on the Provider Directory.

- **Entity type:** As related to the information entered in the **Line 24J** field as assigned to either a person or a corporation (e.g., if it is a personal pin number, select **Person**; if it is a tax ID, select **Corporation**).
- **Practice ID (Line 33B)** - Number assigned by the payer for use in line 33B (this is an identifier issued by the selected insurance payer and assigned directly to the practice; if the practice was not assigned an individual number by the payer, enter the practice tax ID).
- **ID type** - Select the type of number entered in 33B for identification; most commonly used types for this field are:
 - 24 - EIN/Federal Tax ID
 - G2 - assigned by a commercial carrier
 - 1B - Blue Cross/Blue Shield numbers
 - 1D - Medicaid number
 - 1H - Champus/Tricare ID

 DO NOT enter a National Provider ID (NPI) in this field. NPIs should only be entered on the Provider Directory.

- **Entity type** - As related to the information entered in the Line 33B field as assigned to either a person or a corporation (e.g., if it is a personal pin number, select **Person**; if it is a tax ID, select Corporation).
- **Taxonomy** - See **Taxonomy Fields** for important warnings regarding populating Taxonomy Codes in these fields.
- **Line 25 (Tax ID)** - Typically this field is left blank. An OP Implementation Specialist should be consulted prior to adding a Tax ID number in this field.



Warning: Line 25 (Tax ID) is the first place OP looks when populating the Tax ID on claims. If this field is blank, OP defers to the Tax ID field of the Locations tab. For more information on the order in which OP considers Tax ID for claims, visit **Tax ID Setup**.

- **Capitation ID** (Optional) - If patients on this insurance plan must be enrolled with your practice before receiving services, enter the payer-assigned Office ID that would be displayed in their insurance records.
 - **Locator Code** (Optional) - Medicaid Locator Code; should be 3 numbers.
6. Click the **Save** button to save changes and return to the Insurance Payers List window.
 7. Repeat these steps as necessary for each associated provider for this payer.

Copying Credentialed Provider Records

After entering a Provider's credentials once, it is easy to apply the same credentials to multiple payers. Note, the record is applied exactly as it is displayed in the record it is being copied from. If individual payers have assigned different Provider numbers, etc. it is necessary to edit the record once it has been applied to another payer. To copy credentials:

1. In the **Insurance Payers List** window, sort the payer list so that the record you are copying from is listed above the payer you are copying to.



Note: Because the Insurance Payers List is listed alphabetically, click the column header for the Payer Short Name column to change the listing from ascending to descending order in order to get the correct payer listed first.

2. Select the **Payer** whose credentialed providers will be copied.
3. Click to select the **Payer(s)** who the credentialed providers will be copied to. If the payers are listed one after another, use **Shift** on the keyboard to select all payers. If they are separated by other payers in the list, use **CTRL** on the keyboard and select each payer.
4. Click the **Cred** button. A confirmation pop-up box opens that states the action OP is about to take.
5. Select from the following options:
 - **Replace:** Replaces the information about all providers.



- **Insert:** Inserts only those providers who are missing.
- **Cancel:** Closes the Confirm window and does not copy any records.

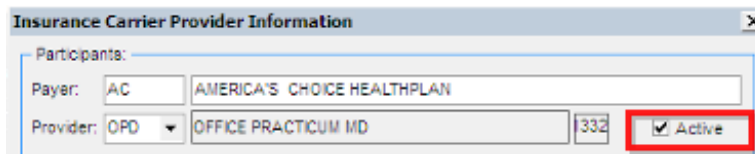
6. Review and click the **OK** button in the Information window that is displayed.

Review the credentialed Provider information that was copied into the Insurance Payer.

Disassociating a Provider from a Payer Record

If a claim has not been created for the provider for this insurance you are able to delete the provider from this payer. If claims were submitted, the provider can only be marked as Inactive.

1. Follow the steps above to modify an associated provider record.
2. Click the **Delete**  button to remove the provider from this payer.
3. To make a Provider inactive, click the **Edit**  button instead.
4. Deselect the **Active** checkbox.
5. Click the **Save** button to exit.




Version 14.8

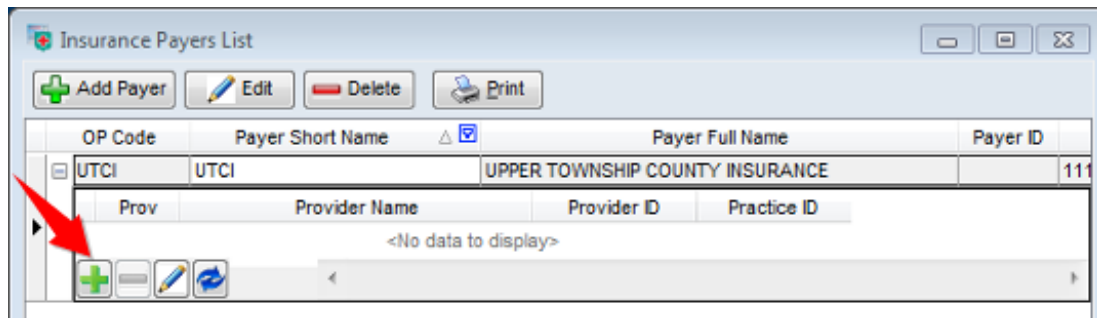
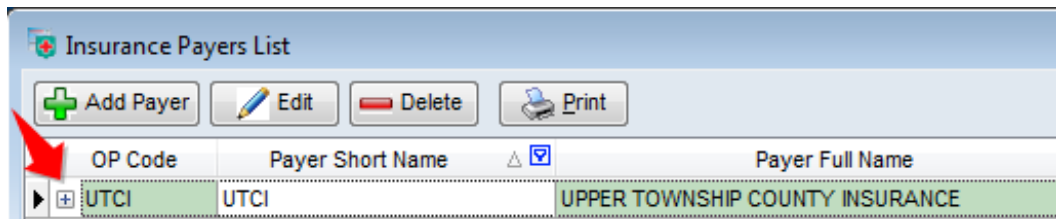
Utilities > Manage Practice > Insurance Payers

Overview

Once a payer has been entered into OP, all provider(s) *must* be associated with payer in the Insurance Payer List who they are credentialed with in order to generate a claim for a provider.

Creating an Associated Provider Record for an Insurance Payer

1. Open the Insurance Payers List.
2. Click the **Insurance Payer** to highlight it.
3. Click  at the left of the Insurance Payer Name. The list expands to display providers associated with this payer.



4. Click the **Edit** button to complete the following in the Insurance Carrier Provider Information window:

- **Provider's Initials** - Select a **Provider** from the drop-down menu.
- Select the **Active** checkbox.
- **Provider ID (Line 24J)** (optional) - Assigned by the payer; is displayed in box 24 J (this is an identifier issued by the selected insurance payer and assigned directly to the provider; if the provider was not assigned an individual number by the payer, enter the practice Tax ID).
- **Type of Provider ID** (to the left of **Line 24J** field) - The most commonly used types for this field are:
 - *24* - EIN/Federal Tax ID
 - *G2* - assigned by a commercial carrier
 - *1B* - Blue Cross/Blue Shield numbers
 - *1D* - Medicaid number
 - *1H* - Champus/Tricare ID

DO NOT enter a National Provider ID (NPI) in this field. NPIs should only be entered on the Provider Directory.

- In the drop-down menu to the far right, further identify the number entered in the Line 24J field as assigned to either a person or a corporation (e.g., if it is a personal pin number, select Person; if it is a tax ID, select Corporation). Click the down arrow button and select from the drop-down menu accordingly.
- **Practice ID (Line 33B)** - Number assigned by the payer for use in line 33B (this is an identifier issued by the selected insurance payer and assigned directly to the practice; if the practice was not assigned an individual number by the payer, enter the practice tax ID).
- **Type of Practice ID** - Select the type of number entered in 33B for identification; most

commonly used types for this field are:

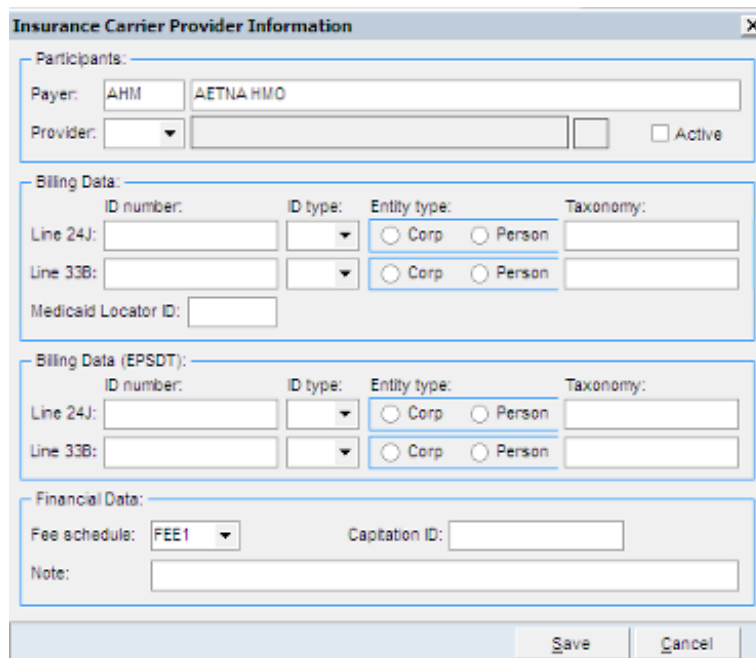
- 24 - EIN/Federal Tax ID
- G2 - assigned by a commercial carrier
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- 1D - Medicaid number
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DO NOT enter a National Provider ID (NPI) in this field. NPIs should only be entered on the Provider Directory.


- In the drop-down menu to the far right, further identify the number entered in the Line 33B field as assigned to a person or a corporation (e.g., if it is a personal pin number, select **Person**; if it is a tax ID, select **Corporation**). Click the down arrow button and select from the drop-down menu accordingly.
- **Capitation ID** (Optional) - If patients on this insurance plan must be enrolled with your practice before receiving services, enter the payer-assigned Office ID that would appear in their insurance records.
- **Locator Code** (Optional) - Medicaid Locator Code; should be 3 numbers.

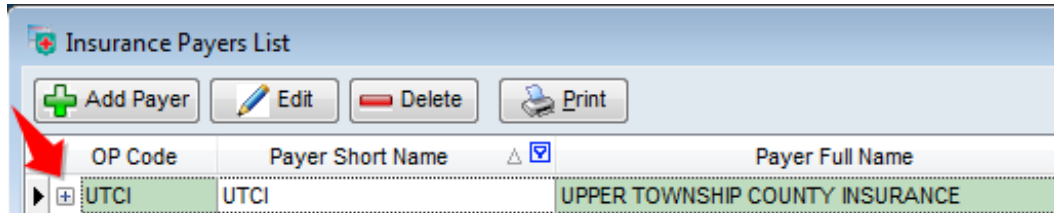
5. Click the **Save** button to save changes and return to the Insurance Payers List window.




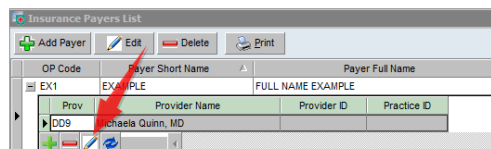
Modifying an Associated Provider Record

From time to time, your office may need to edit a provider pin or group number, as identified by a payer:

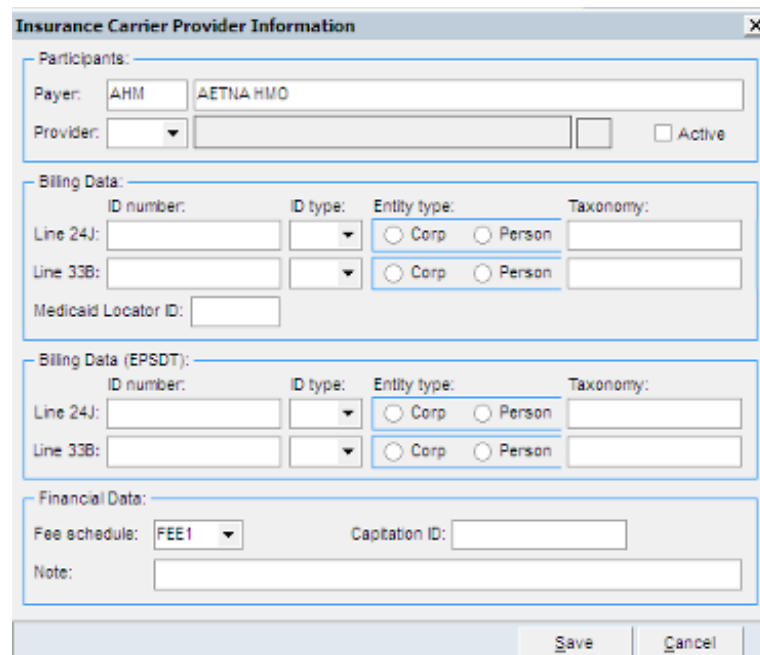
1. Open the Insurance Payers List (**Utilities > Manage Practice > Insurance Payers > Insurance Carrier Provider Information**).
2. Click the **Insurance Payer** to highlight it.
3. Click  to the left of the Insurance Payer Name. The listing expands, displaying associated providers for this payer.



4. Click the **Provider Record** to highlight it to edit it.
5. Click the **Edit**  button in the small tool bar below the Associated Provider listings for this payer. The Insurance Carrier Provider Information window is displayed.





6. In the Insurance Carrier Provider Information window, edit the fields as appropriate.
7. Click the **Save** button at the bottom of the form to save changes and return to the Insurance Payers List window.

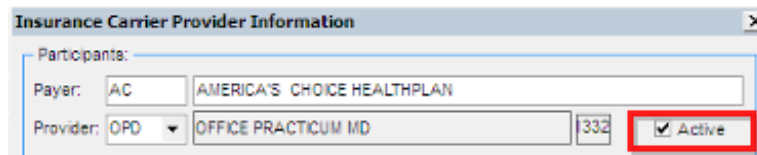


Repeat these steps as necessary for each associated provider for this payer.

Disassociating a Provider from a Payer Record

If a claim has not been created for the provider for this insurance you are able to delete the provider from this payer. If claims were submitted, the provider can only be marked as Inactive.

1. Follow the steps above to modify an associated provider record.
2. Click the **Delete**  button to remove the provider from this payer.
3. To make a provider inactive, click the **Edit**  button instead.
4. Deselect the **Active** checkbox.
5. Click the **Save** button to exit.



Participants:	
Payer:	AC AMERICA'S CHOICE HEALTHPLAN
Provider:	OPD OFFICE PRACTICUM MD 332 <input checked="" type="checkbox"/> Active