Associate an Insurance Contract with a Payer

Last Modified on 11/21/2023 1:20 pm EST

Version 21.3
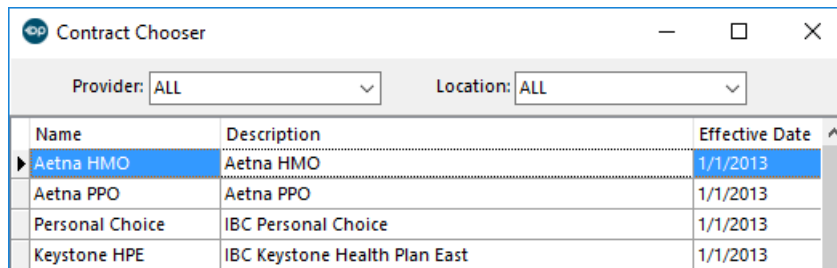
> **Path: Billing tab > Payers**

Overview

Once you have added an Insurance Contract into OP, it must be associated to the specific payer to which it pertains. Follow the steps below to associate a contract to a payer.

- Associate an Insurance Contract
- Delete a Contract
- Associate a Contract With a Specific Provider for a Payer
- Associate a Contract With a Specific Location for a Payer
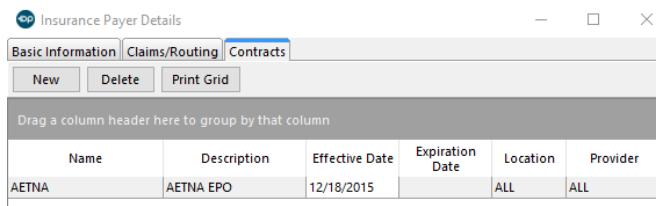
Associate an Insurance Contract

1. Navigate to the **Insurance Payers List** using the path above.
2. Select a Payer.
3. Click the **Edit** button ✏️ or double click on the Payer.
4. Click the **Contracts** tab.
5. Click the **New** button.
6. From the **Contract Chooser** window, select the contract to associate with this payer and click **Select**.

7. If necessary, change the **Effective date**, **Expiration Date**, **Location**, or **Provider** using the drop-down.
8. Click **Save** when finished. Continue with steps 4-7 to associate additional contracts.

Delete a Contract

1. Select a Payer.
2. Click the **Edit** button.
3. Click the **Contracts** tab.
4. Highlight the Contract to delete and click the **Delete** button.

Associate a Contract With a Specific Provider for a Payer

Sometimes different providers for a practice will require a different contract than others for some payers.

1. Navigate to the **Insurance Payers List** using the path above.
2. Select a Payer.
3. Click the **Edit** button ✏ or double click on the Payer.
4. Click the **Contracts** tab.
5. Select the contract from the list of contracts.
6. Click the **Edit** button.
7. Click on the **Provider** column drop-down and choose a provider.
8. Click the green checkmark to **Save**.

Associate a Contract With a Specific Location for a Payer

Sometimes different locations for a practice will require a different contract than others for some payers.

1. Navigate to the **Insurance Payers List** using the path above.
2. Select a Payer.
3. Click the **Edit** button ✏ or double click on the Payer.
4. Click the **Contracts** tab.
5. Select the contract from the list of contracts.
6. Click the **Edit** button.
7. Click on the **Location** column drop-down and choose a location.
8. Click the green checkmark to **Save**.

Version 14.10

Utilities > Manage Practice > Insurance Payers

Overview

Insurance Contracts can be created to keep track of an insurance reimbursement schedule. Each insurance company can have their own insurance contract.

Associate an Insurance Contract

1. Select a Payer.
2. Click the **Edit** ✏ button or double click on the Payer.
3. Click on the **Contracts** tab.
4. Click the ➕ Add button.
5. From the dropdown choose the contract to associate with this payer and click **Select**.
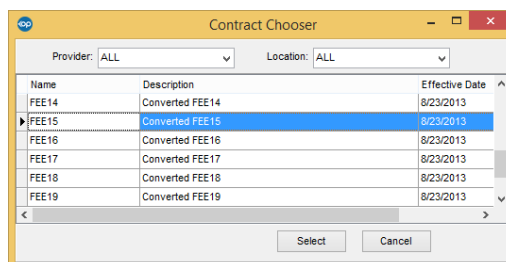
6. If necessary, change the **Effective date**, **Expiration Date**, **Location**, or **Provider** using the dropdown.
7. Click **Save** when finished. Continue with steps 4-7 to associate additional contracts.
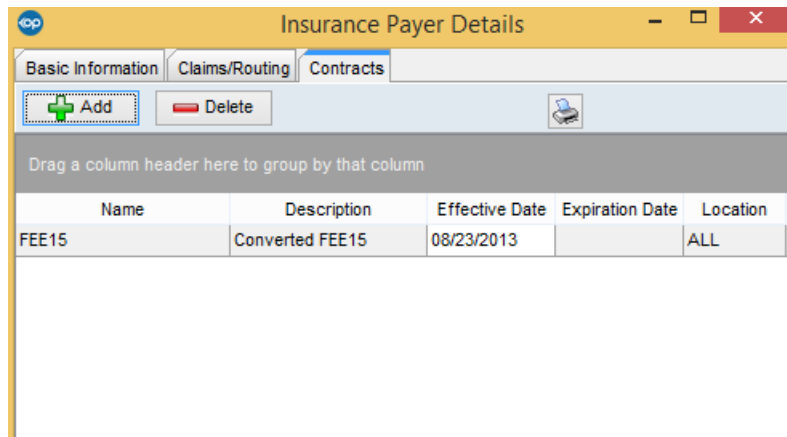
Deleting a Contract

1. Select a Payer.
2. Click on the **Edit** ✏ button.
3. Click the **Contracts** tab.
4. Highlight the Contract to delete and click the **Delete** button.