

### 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.

# Using the Update Insurance Contracts Window

Last Modified on 11/26/2019 9:50 am EST

Version 14.19

**Path: Billing tab > Billing Center button > Adjudications tab > Post Paymt button**

**Path: Billing tab > Billing Center button > Adjudications tab > Contracts button**

## Overview

The Update Insurance Contracts window is a tool used to help manage your Insurance Contracts.

You must be assigned the **Billing\_Contracts\_Modify** permission to use the Update Insurance Contracts feature. Once this permission is given, ensure the following:

- Contracts have been entered into OP for your insurance payers.
- Contracts that have been entered into OP have also been associated to the appropriate insurance payer(s). If no Insurance Contracts are associated with a Payer:
  - Any ERAs that come into the Adjudications tab of OP for that Payer will not be able to match the ERA allowable rates from the adjudication to a contract.
  - OP will list the Contract as Unknown and will give you the OP code for the Payer so that you know what Payer to update.
  - Once you have updated the Insurance Payer with the appropriate contract, adjudications for the Payer can be immediately compared to the Contract.

## Update Insurance Contracts using the Post Payment Button

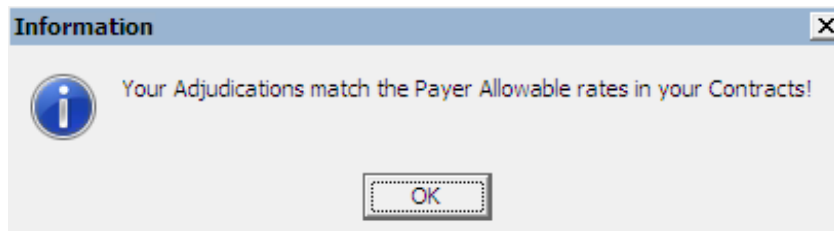
1. Select the payment ID of the payment you want to post.
2. Click the **Post Payment** button. The Insurance Contracts window will review approved adjudications from the check selected. A window will be displayed if there is a difference between the adjudication or ERA allowable rate and the Insurance Contract on one or more

CPT codes. You can organize and save the information displayed on the grid for future use:

- The CPT and Modifier columns match the adjudication and the Contract.
- The Effective Date and Contract Amount come from the Insurance Contract.
- The Difference column is a calculated and color coded to show you how much the ERA allowable has increased or decreased from the rate in your Contract.
  - **Green** indicates an increase from the Contract amount to the ERA allowable.
  - **Yellow** indicates that the original Contract amount was zero (a Contract may not have been linked).
  - **Red** indicates a decrease from the Contract amount to the ERA allowable.
- The new Effective Date will be inserted into the new record on the Insurance Contract as the Effective Date if you choose to accept the new rate. The Accept box is populated for each CPT to make building the Insurance Contract rates easier.
- By accepting the adjudication, OP will add the new allowable rates to the Contract for that Payer.

## Update Insurance Contracts using the Contracts Button

1. Click **Contracts**. You may receive the following message if your adjudications match the Contract amounts:



OP will review every adjudication in the adjudication table and display all of the differences for you at once.



**Note:** This workflow may be particularly useful if your practice prefers to print the grid and investigate the differences before accepting changes.

2. To leave the window without accepting any adjudications, click the **Cancel** button.
3. Again, OP will pre-populate the 'Accept' box(es) where the Contract rate was previously zero.
4. Click the **Save** button to accept the marked adjudications. OP will insert a new Contract detail record for each accepted rate.

Version 14.10

## Overview

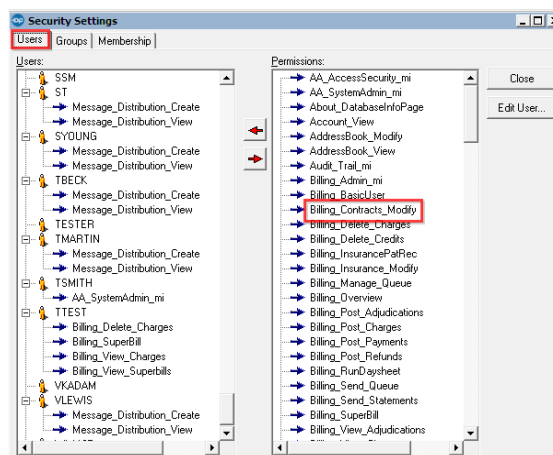
OP has released a new tool, the 'Update Insurance Contracts' window, to help manage your Insurance Contracts. A new permission has also been added to OP to ensure the proper staff members can access this new function.

## Assign the New Permission

**Path: Utilities Menu > System Admin > Security Access (Keyboard Shortcut keys: [Alt][U][A][D])**

You will see the Users in your practice listed on the left and the available Permissions to the right.

1. Locate the permission: Billing\_Contracts\_Modify.
2. Click the permission and drag it over to the appropriate user's name on the left.
3. Click the Close button to exit the Security Settings window.



**Note:** Only those assigned this permission will be able to utilize the 'Update Insurance Contracts' feature.


In addition to granting access to this feature, you will need to ensure that Insurance Contracts and Payers are set up correctly for you practice.

## Check Contract Setup/Add Contract

**Path: Utilities Menu > Manage Practice > Insurance Contracts (Keyboard Shortcut keys: [Alt][U][P][C])**

To add a new contract:

1. Click the green + sign.
2. Select the CPT list you would like to see.


 **Note:** If you will be using the new 'Update Insurance Contract' window to populate the Contract Details, you may wish to select "None".

3. Add the appropriate Effective Date for the contract.
4. Enter the 'Contract Name' and 'Description' in the appropriate fields.
5. Enter the 'Anniversary Date' (for example, if the contact will renew on the first of the year, enter January 1, 20xx).
6. Enter the 'Contract Details' in the bottom panel of the Insurance Contracts window by clicking the + sign and saving with the green check mark.

**Path: Utilities Menu > Manage Practice > Insurance Payers (Keyboard Shortcut keys: [Alt][U][P][I])**

Associate a payer with a contract:

1. Select the payer, and click the edit pencil.
2. Navigate to the 'Contracts' tab.
3. Click the +ADD button to link a contract to the payer.
4. Choose the contract from the list and click 'Select'.
5. When all appropriate contracts have been added to the payer, click 'Save'.

 To ensure that each Payer has an associated Insurance Contract, you will need to open each Payer individually.

If no Insurance Contracts are associated with a Payer:

- Any ERAs that come into the Adjudications tab of OP for that Payer will not be able to match the ERA allowable rates from the adjudication to a contract.
- OP will list the Contract as Unknown and will give you the OP code for the Payer so that you know what Payer to update.
- Once you have updated the Insurance Payer with the appropriate contract, adjudications for the Payer can be immediately compared to the Contract.

**After completing all of the setup including assigning the new permission, you're ready to use the 'Update Insurance Contracts' window.**

The Update Insurance Contracts window can be accessed two ways withing the Adjudications tab

of the Billing Center:

- The **Post Payment** button.
- The **Contracts** button.



To use the **Post Payment** button, select the payment ID of the payment you want to post, and click the 'Post Payment' button.

- The Insurance Contracts window will review approved adjudications from the check selected.

**i** The window will pop up if there is any different between the adjudication or ERA allowable rate and the Insurance Contract on one or more CPT codes.

**✓ Note:** Like other grids in OP, you have the ability to organize the information you see and save the settings for your future use.

\* The CPT and Modifier columns match the adjudication and the Contract.

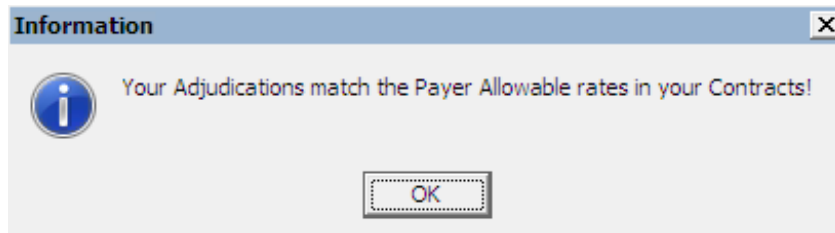
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- The new Effective Date will be inserted into the new record on the Insurance Contract as the Effective Date if you choose to accept the new rate.

**i** OP pre-populates the 'Accept' box for each CPT to make building the Insurance Contract rates simple and fast.


- By accepting the adjudication, OP will add the new allowable rates to the Contract for that Payer.

To use the new **Contracts** button, click **Contracts**.

You may receive the following pop-up if your adjudications match the Contract amounts:



- OP will review every adjudication in the adjudication table and display all of the differences for you at once.

 **Note:** This workflow may be particularly useful if your practice prefers to print the grid and investigate the differences before accepting changes.

- To leave the window without accepting any adjudications, click the **Cancel** button.
- Again, OP will pre-populate the 'Accept' box(es) where the Contract rate was previously zero.
- Click the **Save** button to accept the marked adjudications.
- OP will insert a new Contract detail record for each accepted rate.