

# Employer Portal Registration

## Process Overview:

**Enter employer in Insurance Plan Table**

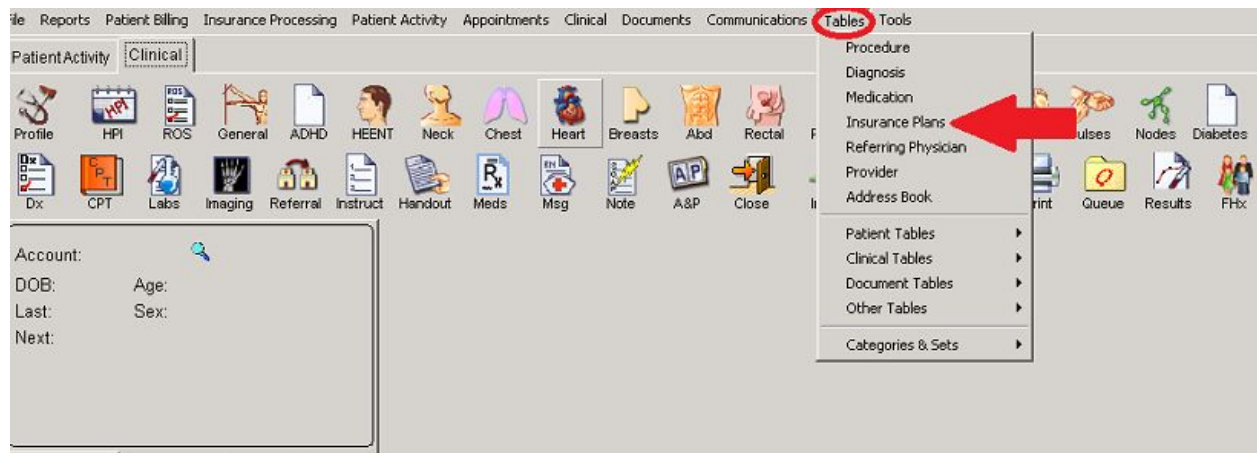
**Enter employer in Address Book**

**Link employer to patient**

**Link Insurance Plan to patient**

## Enter employer in Insurance Plan Table

From the Clinical screen, choose Tables, Insurance Plans.



From the **Insurance Plan Table**, search the code field to make sure employer is not already entered. Search alphabetically or by entering a question mark. Enter.

The screenshot shows the 'Insurance Plan Table' application window. At the top, there is a search bar labeled 'Code:' containing a question mark, which is circled in red. To the right of the search bar is a 'Carrier:' field. Below the search bar is a 'Plan:' field and a checkbox labeled 'Plan is no longer in use'. The main area of the window is divided into tabs: 'General Info', 'Billing Info', 'Co-Payments', and 'Other'. The 'General Info' tab is active, showing various input fields for 'Carrier', 'Address', 'cont'd', 'City', 'State', 'Zip Code', 'Phone', 'Fax No', 'E-Mail', and 'Practice ID'. On the right side, there are fields for 'Payer ID', 'Clearinghouse ID', 'Plan Type', 'Category', and 'Formulary'. A 'Provider Enrollment' button is located below the 'Formulary' field. At the bottom of the window, there are four buttons: 'Save', 'Delete', 'Label', and 'Cancel'. A 'Notes:' text area is located at the bottom left of the main form area.

If not found, a pop-up will appear: Code not on file found. Do you want to add? Yes.

The screenshot shows a small dialog box titled 'Unknown Code'. It contains a question mark icon and the text 'Code not on file. Do you want to add?'. At the bottom of the dialog, there are two buttons: 'Yes' and 'No'. The 'Yes' button is circled in red.

Enter **Code** you would like to use for Employer in that field. Tab through to **Plan** field and enter full name of employer. On the **General Info** tab, fill in employer information. You must **enter email address**. Change **Plan Type** to Corporate. This will also change **Category** field to Corporate.

Insurance Plan Table

Code: XYZ Carrier: [ ]

Plan: [ ]  Plan is no longer in use

General Info | Billing Info | Co-Payments | Other

Carrier: [ ] Payer ID: [ ]

Address: [ ] Clearinghouse ID: [ ]

cont'd: [ ]

City: [ ] Plan Type: [ ]

State: [ ] Zip Code: [ ] Category: [ ]

Phone: [ ] Formulary: None

Fax No: [ ]

E-Mail: [ ]

Practice ID: [ ] Provider Enrollment

Notes: [ ]

Save Delete Label Cancel

Click on **Billing Info** tab. Change both **Billing Format** and **Paper Format** to Corporate Invoice.

The screenshot shows the 'Insurance Plan Table' application window. At the top, there are fields for 'Code: XYZ' and 'Carrier: XYZ'. Below that, the 'Plan: XYZ Employer Test' is displayed, along with a checkbox for 'Plan is no longer in use'. The interface has several tabs: 'General Info', 'Billing Info' (which is circled in red), 'Co-Payments', and 'Other'. The 'Billing Info' tab is active, showing two columns of 'Plan Settings' and a 'Billing Set-Up' section. The 'Billing Set-Up' section contains several dropdown menus: 'Fee Schedule' (None), 'Billing Format' (Corporate Invoice), 'Paper Format' (Corporate Invoice), 'Enrollment Set' (Standard), 'Code Set' (Practice Default), 'Place of Serv Method' (Standard), and 'Misc Claim Info' (None). The 'Billing Format' and 'Paper Format' dropdowns are highlighted with red boxes. At the bottom, there is a field for 'Review Outstanding Claims After 30 Days'.

Code: XYZ Carrier: XYZ

Plan: XYZ Employer Test  Plan is no longer in use

General Info **Billing Info** Co-Payments Other

Plan Settings

- Assigned
- Participate in Plan
- Post Payment by Procedure
- Write-Off Disallowed Amount
- Write-Off Unpaid Balance
- Does not require complete ICD-10
- Medigap Plan
- Use Physicians Asst Modifier
- Referring Physician Required
- Authorization Number Required
- Nurse Visits Are Counted
- Use Initial Treatment Date
- Exclude Legacy ID Prefix
- Primary Deductible Not Covered
- Bill using individual provider info
- Service Facility Required
- Bill E&M code with a CPE
- Leave Box 32 Blank
- Bill claim balance in box 30
- Always print a "thru" date in box 24
- Exclude NDC Codes
- Use unique NPI for DME
- Always report Rendering Prv
- Require eligibility confirmation
- Use Alternate Billing Address

Plan Settings

- Do not print provider ID's in box 24
- Do not print carrier address
- Do not use practice NPI
- Do not print taxonomy in box 33b
- Do not report patient payments
- Do not report loop 2320 info
- Show patient address in box 32 for home visits

Billing Notes

Billing Set-Up

Fee Schedule: None

Billing Format: Corporate Invoice

Paper Format: Corporate Invoice

Enrollment Set: Standard

Code Set: Practice Default

Place of Serv Method: Standard

Misc Claim Info: None

Review Outstanding Claims After 30 Days

Click on **Other** tab. Under **Payment Option**, choose Corporate Invoice. **Enroll**.

The screenshot shows the 'Insurance Plan Table' application window. At the top, there are fields for 'Code: XYZ' and 'Carrier: XYZ'. Below that, the 'Plan: XYZ Employer Test' is displayed with a checkbox for 'Plan is no longer in use'. A tabbed interface at the bottom has four tabs: 'General Info', 'Billing Info', 'Co-Payments', and 'Other', with 'Other' being the active and highlighted tab. The 'Other' tab contains several sections: 'Payment Option' with radio buttons for 'Regular', 'Medicare', 'HMO', 'Capitation', and 'Corporate Invoice' (which is selected and circled in red); 'Transaction Codes' with input fields for 'Payment', 'Deductible', 'Write-Off', and 'Risk'; 'Other Info' with input fields for 'Payer Office', 'OCNA ID', 'Medicaid Code', and 'Typology Code', plus checkboxes for 'Radiology Authorization Required' and 'Covers Chronic Care Management'; 'Related Organizations' with a dropdown for 'Affiliated Lab' set to 'Unspecified'; 'Prescription Coverage' with a dropdown for 'Tier Program' set to 'None' and an input field for 'Days Covered'; 'Secure Portal' with an 'Enroll' button circled in red and a checked checkbox for 'Enrolled in Portal'; and 'Eligibility Info' with input fields for 'Payer ID', 'User Name', and 'Password', plus a checkbox for 'Do not use Eligibility Checking'.

Print **Secure Portal Information form**. Mail to the employer.

## Enter Employer in Address Book

Choose **Tables, Address Book**.




Select Contact.

A screenshot of the 'Address Book' dialog box. The 'Select Contact' button is circled in red. The dialog box contains the following fields: Name, Address, cont'd, City, State, Zip Code, Phone, Fax No, Cell Phone, E-Mail, and Category (set to 'Unspecified'). At the bottom are 'Save', 'Delete', and 'Cancel' buttons.

Search to make sure Employer is not already in Address Book. If not found, click **Create**.

**Select Contact**

Description: A 

Type: All Types


- Account Care
- Acecess Diabetic Supply
- Acm
- ACM - Mary Lou's
- Acm Client Services
- ACM Elmgrove
- ACM Lab
- Acm LAB
- ACM Lab
- ACM LAB
- Acm lah brackport

**Create** **Cancel**

**Save** **Delete** **Cancel**

Enter employer name and information. Change **Category** to Employer. Click on **Link** icon.

**Address Book**

Select Contact 

Name: Joe XYZ

Address: 123 Riverside Dr

cont'd:

City: Rochester

State: NY Zip Code: 14620

Phone: 585 -

Fax No: 585 -

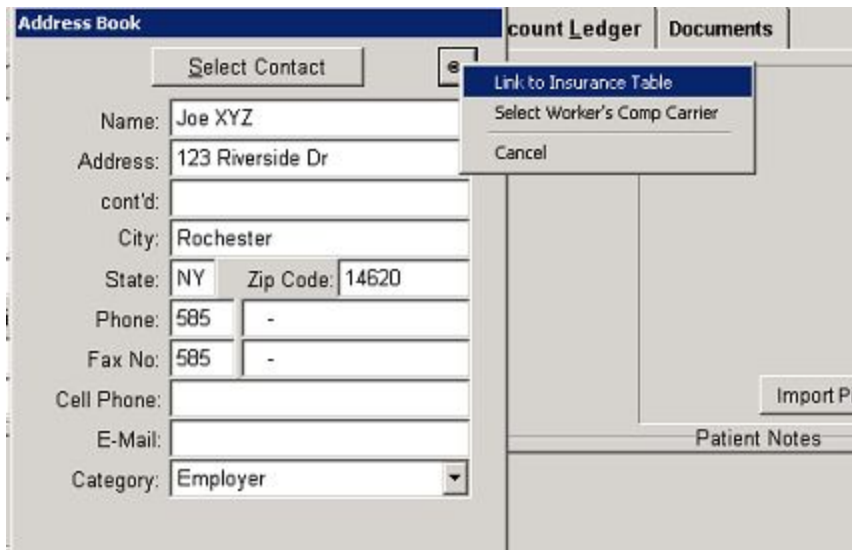
Cell Phone:

E-Mail:

Category: **Employer**

**Save** **Delete** **Cancel**

Choose **Link to Insurance Table**.



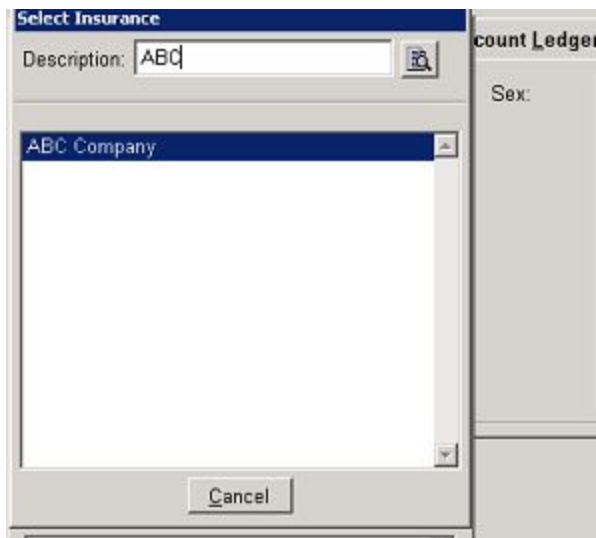
The screenshot shows the 'Address Book' window with a context menu open over the 'Select Contact' button. The contact information for 'Joe XYZ' is displayed in the background. The context menu options are:

- Link to Insurance Table
- Select Worker's Comp Carrier
- Cancel

Contact Information:

- Name: Joe XYZ
- Address: 123 Riverside Dr
- City: Rochester
- State: NY Zip Code: 14620
- Phone: 585 -
- Fax No: 585 -
- Category: Employer

From **Select Insurance** window, search for company you previously added in Step 1. Click on it. **Save**.



The screenshot shows the 'Select Insurance' window. The 'Description' field contains 'ABC'. The search results list 'ABC Company' as the selected option. A 'Cancel' button is visible at the bottom of the window.

Search Results:

- ABC Company



## Link Employer to Patient

From **Patient Activity** screen, click on **Employer**.

The screenshot shows the 'Patient Activity' window for patient Jennifer Test. The account number is 60762. The 'Employer' button at the bottom is circled in red. The patient information is as follows:

Patient Info		Responsible Party	
First Name:	Jennifer	First Name:	Jennifer
Last Name:	Test	Last Name:	Test
Address:	8 West Ave	Home Phone:	258-9632
cont'd:		Work Phone:	
City:	Rochester	Relation:	Self
State:	NY	Zip Code:	14624
Home Phone:	585 258-9632	Billing Status:	Write-In Patient
Work Phone:	585 -	Pat Balance:	0.00
		Ins Balance:	0.00

Additional patient details: Age: 30, Sex: F, Date of Birth: 06/05/86, Last Visit: //, Next Visit: , Provider: DS, Chart #: , Category: Regular.

Plan Information:

Plan	Insured Party	ID
City Of Salisbury	Jennifer Test	
City Of Salisbury	Jennifer Test	

Navigation buttons: Pharmacy, Payments, Walk-Out, **Employer**, Exit.

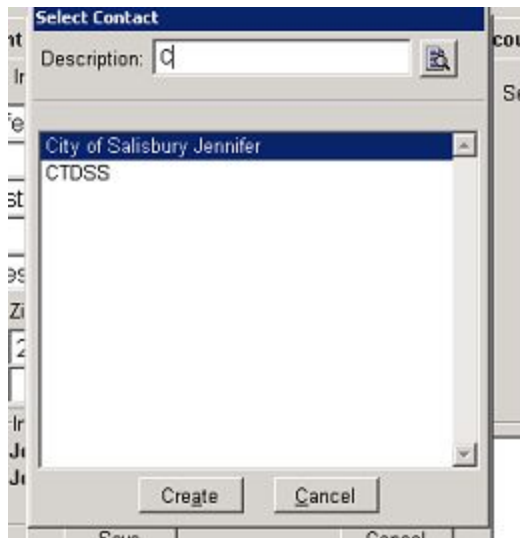
In **Employer Info** window, click **Select Employer**.

The screenshot shows the 'Employer Info' window. The 'Select Employer' button at the top is circled in red. The form fields are as follows:

Company:	
Address:	
cont'd:	
City:	
State:	Zip Code:
Phone:	704 -

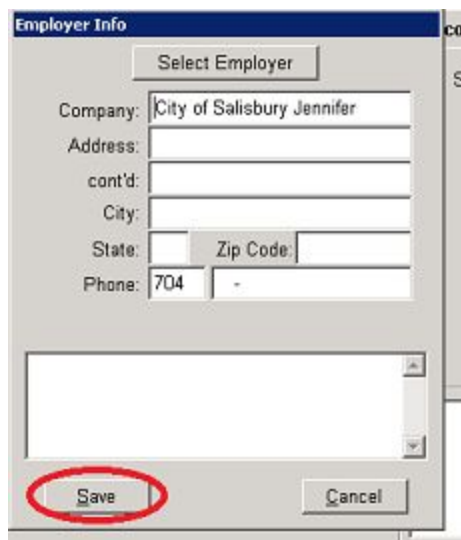
Buttons: Save, Cancel.

Search in **Description** field for employer. Click on correct one.



The screenshot shows a dialog box titled "Select Contact". At the top, there is a search field labeled "Description:" containing the letter "d". Below the search field is a list box with two entries: "City of Salisbury Jennifer" (which is highlighted in blue) and "CTDSS". At the bottom of the dialog box, there are two buttons: "Create" and "Cancel".

**Save.**



The screenshot shows a dialog box titled "Employer Info". At the top, there is a button labeled "Select Employer". Below this are several input fields: "Company:" with the text "City of Salisbury Jennifer", "Address:", "cont'd:", "City:", "State:", "Zip Code:", and "Phone:" with the number "704". Below these fields is a large empty text area. At the bottom of the dialog box, there are two buttons: "Save" (which is circled in red) and "Cancel".

## Link Insurance Plan to Patient

From **Patient Activity** screen, locate patient. Click on **Insurance Plans** tab.

The screenshot shows the Patient Activity screen for patient Jennifer Test. The 'Insurance Plans' tab is highlighted with a red circle. The patient information is as follows:

Patient Info		Responsible Party	
First Name:	Jennifer	First Name:	Jennifer
Last Name:	Test	Last Name:	Test
Address:	8 West Ave	Home Phone:	258-9632
City:	Rochester	Work Phone:	
State:	NY	Relation:	Self
Zip Code:	14624	Billing Status:	Write-In Patient
Home Phone:	585 258-9632	Pat Balance:	0.00
Work Phone:	585 -	Ins Balance:	0.00

Additional patient details: Age: 30, Sex: F, Date of Birth: 06/05/86, Last Visit: //, Next Visit: //, Provider: DS, Chart #: //, Category: Regular.

Click **Add Plan**.

The screenshot shows the Insurance Plans screen with the 'Add Plan' button highlighted with a red circle. The screen displays the following information:

**No insurance plans on file**

Insurance:  Insured:  Order: Other  ID:   Assigned

**Add Plan**

**Insured Party Data**

First Name:	<input type="text"/>	M.I.:	<input type="text"/>	Birth Date:	//
Last Name:	<input type="text"/>	SSN:	--	Sex:	Male
Address:	<input type="text"/>	Relation:	Self	Insured's ID:	<input type="text"/>
City:	<input type="text"/>	Effective:	//	Expired:	//
State:	<input type="text"/>	Zip:	<input type="text"/>		
Phone:	<input type="text"/>				

**Plan Info**

Group #:	<input type="text"/>
Plan Name:	<input type="text"/>
Formulary:	<input type="text"/>
Employer:	<input type="text"/>
Co-Payment:	<input type="text"/>

Click **Occupational**. Because insurance has been linked, correct insurance plan will auto-fill.  
\*Note: Follow same steps to link Workers Comp to a patient. Just choose Workers Comp instead of Occupational.

Select Insurance

New Plan  Workers Comp  Occupational

Description:

Create Cancel

Because insurance has been linked, correct insurance plan will auto-fill.

Cover Page Patient Info Responsible Party Insurance Plans Account Ledger Documents

New Plan

Insurance: CIT1 Insured: Jennifer Order: Secondary ID:   Assigned

Eligibility Add Plan

Insured Party Data

First Name: Jennifer M.I.: Birth Date: 06/05/1986  
Last Name: Test SSN: - -  
Address: 8 West Ave Sex: Female  
cont'd: Relation: Self  
City: Rochester Insured's ID:   
State: NY Zip: 14624 Effective: / /  
Phone: 585 258-9632 Expired: / /

Plan Info

Group #:   
Plan Name:   
Formulary: Plan Default  
Employer:   
Co-Payment:

Save Cancel Delete Plan

Employer is now registered in Employer Portal.