Reference Guide:

Billing with Separate Disciplines

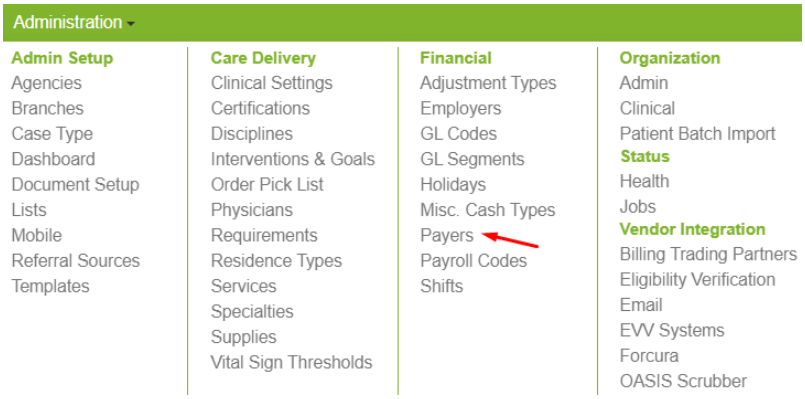
Overview

Use this procedure if you have a payer that may require claims to be billed separately by discipline. Complete all steps of the guide in order to properly create the claims.

Procedure

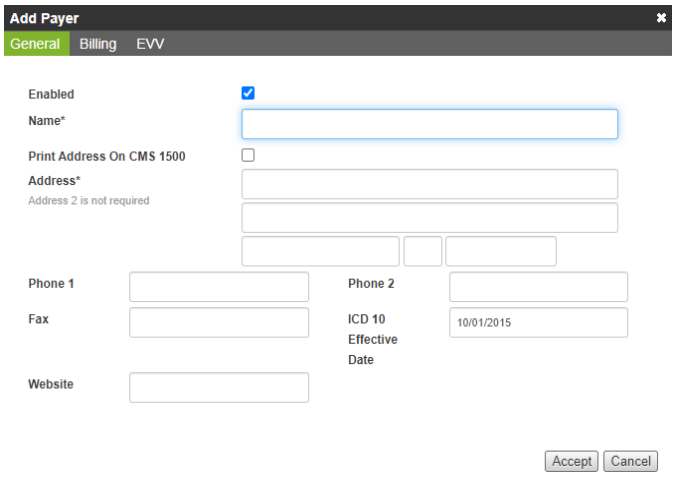
Payer Setup

1. Select **Administration → Financial → Payers**.



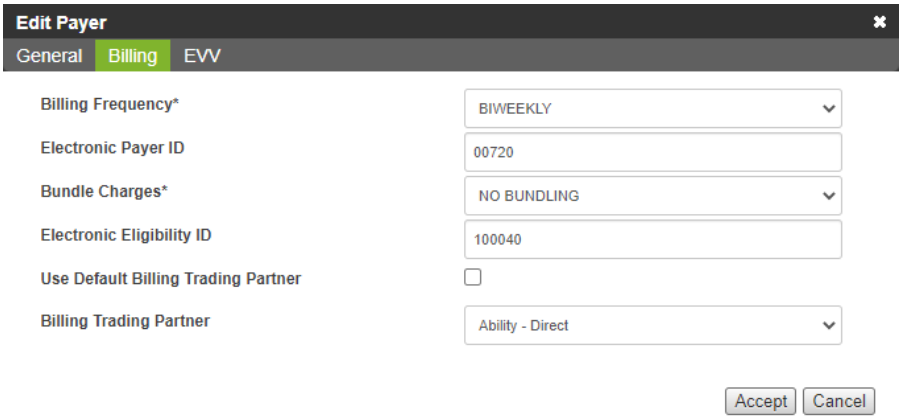
2. Click **Add Payer**. The Add Payer dialog will appear.

3. On the **General Tab** - Ensure the Enabled box is **checked**, **name** the Payer, and **Add** the address in the required fields.



4. On the Billing Tab, **add** the information into the required fields.

    - Billing Frequency
    - Electronic Payer ID (Clearinghouse Payer ID)
    - Bundle Charges
    - Electronic Eligibility ID (Dorado/Esolutions Payer ID)
    - Billing Trading Partner



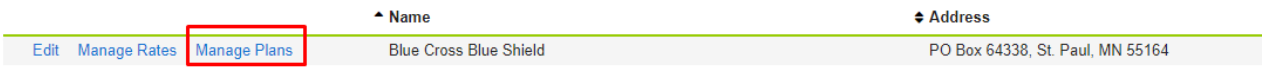
5. Click **Accept**.

Plan Setup

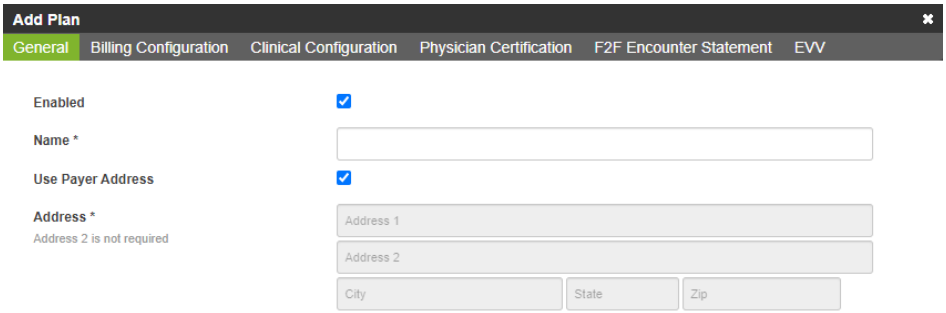
Add a plan for each discipline for which you need to bill for the payer.

For each discipline:

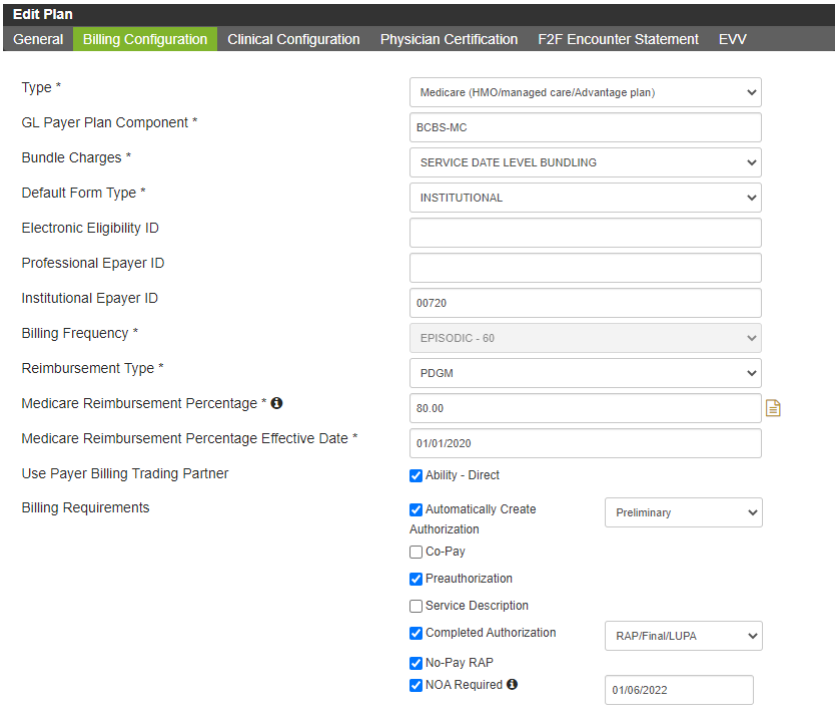
1. Chose the new Payer from the Payer pick list, select **Manage Plans**. The Plan dialog will appear.



2. Click **Add** a Plan. The Add Plan dialog appears.
3. **Complete** required fields for the General Tab.



4. On the Billing tab, **enter** the following:
    - Type
    - GL Payer Plan Component (use generic label if there is none)
    - Bundle Charges
    - Default Form Type
    - Electronic Eligibility ID (Dorado/Esolutions Payer ID)
    - Professional Epayer ID (Clearinghouse Payer ID)
    - Institutional Epayer ID (Clearinghouse Payer ID)
    - Billing Frequency
    - Reimbursement Type
    - Use Payer Billing Trading Partner
    - Billing Requirements

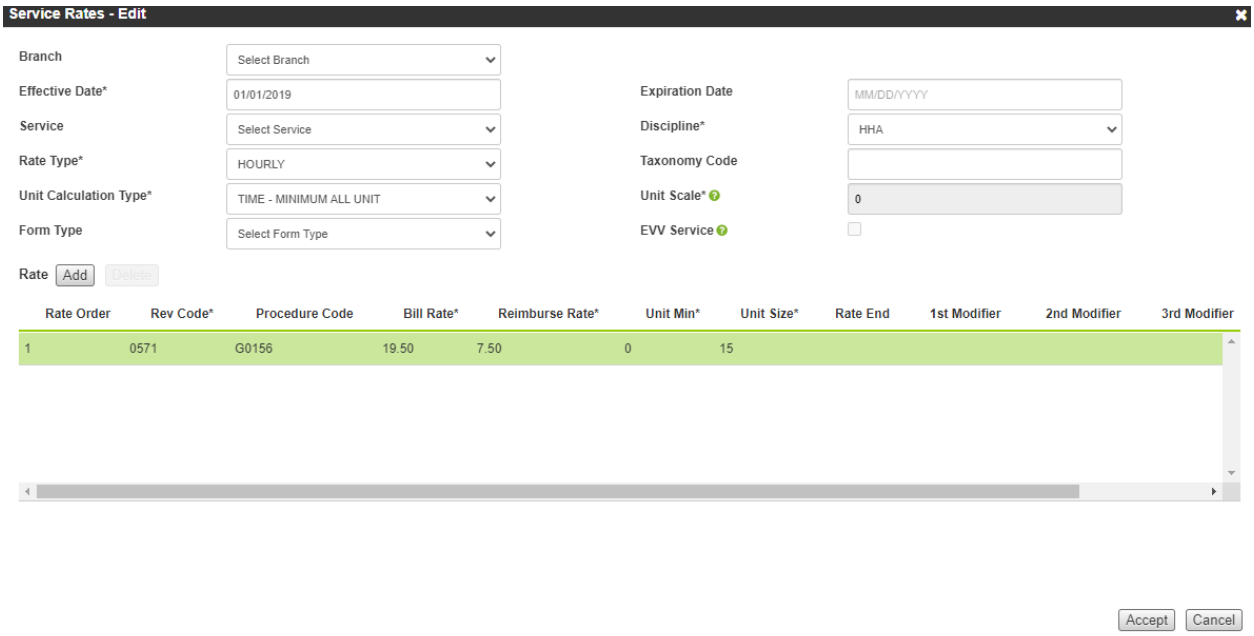


5. On the Clinical tab, **select** the configuration rules that apply to the plan.
6. Click **Accept**.

Rate Setup

1. For each Discipline (Plan), click **Manage Rates**.

2. Select **Add Rate** from the Service Rates page. The Service Rates add dialog appears.

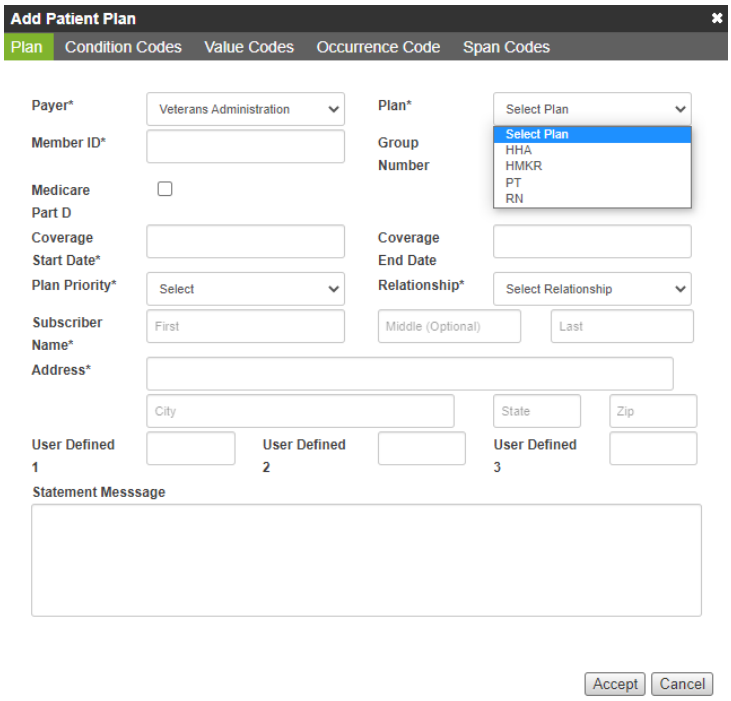


3. **Enter** all required information.
4. Click **Accept**.
5. **Continue** adding rates for all required discipline (plans).

Patient Payer Setup

You will need to add a plan for each discipline for which you need to bill.

1. From the Clients Financial record, **select** the Payers tab.
2. Click **Add**, The Add Patient Plan dialog appears.

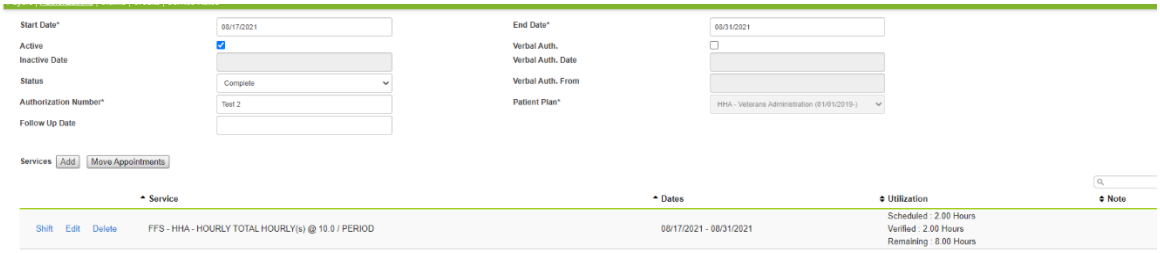


3. **Complete** all required information in all tabs.

Authorization Setup by Plan

1. From the Financial Record Authorizations tab, click **Add**. An authorization form appears.

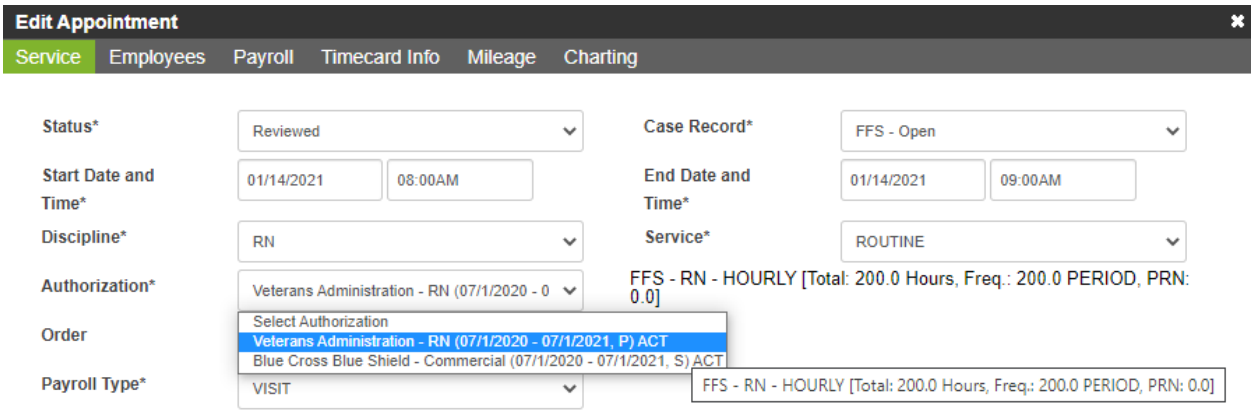
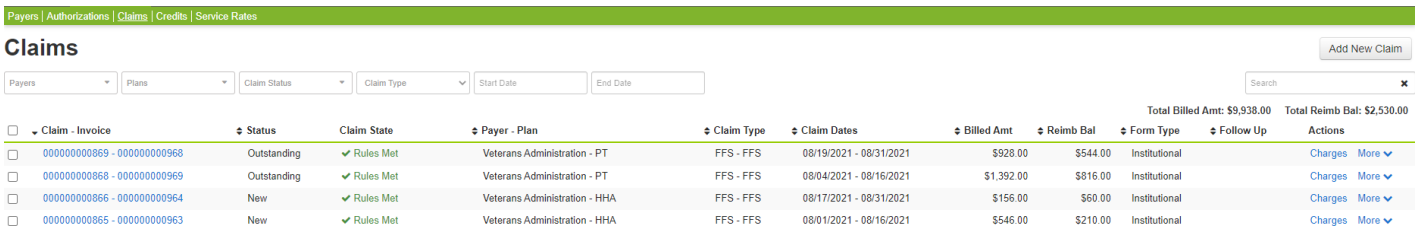
2. **Fill out** all required fields. In the Patient Plan field, be sure to click to select the correct discipline for the plan.



3. Once you have completed the authorization and completed all services, click **Accept**. The following is an example of how the screen appears when all authorizations are setup.

Adding Appointments

When adding an appointment, simply select the correct discipline authorization from the authorization field to ensure the proper setup of the claim.



The process is now complete. The appointments will now generate a claim of services by discipline as shown below.