Quick Reference Guide

Using Copy to Change a Payer/Plan Setup

Overview

Changing an existing Payer/Plan setup may cause issues with existing claims. We recommend that you copy the existing Payer/Plan, rename it, and change the setup. The new payer/plan should then be added to the patient record for use with future episodes.

Procedure

Copy payer/plan and change setup

1. With Admin user privileges, go **Administration > Payers**.
2. For the Payer, select **Manage Plans**.
3. Select **Copy** to duplicate a plan.

4. Rename the plan and set options as required.

Add new payer/plan to patient record

You will need to add the new plan into the client's Financial Record when you recertify or begin a new episode.

1. Navigate to the client record and select the **Financial Record** tab.
2. Click **Add** to select the new plan.

Tip: *Check that the payer/plan is associated with the authorization for the new episode.*