

## Reference Guide: Payer Change

### Overview

Use this procedure when you need to change a payer during an episode.

**Note:** Due to the downstream impacts of a case, we require a case discharge and readmit for all payer changes.

### Procedure

You can follow this procedure once the discharge appointment and documentation has been initiated.

#### Update the Payer:

1. Navigate to the **Financial Record** in the client record.
2. Select **Payers** tab, click **Actions > Edit**, add the **Coverage End Date**, and click **Accept**.

**Note:** The new payer will be added during the intake workflow.

#### Update the Authorization:

1. Navigate to the **Financial Record** tab in the client record.
2. Select **Authorizations** tab, click **Edit**, **deselect** the Active box and **add** an inactive date, this date should match the end date of the coverage, click **Accept**.

Start Date*	10/19/2019
Active	<input type="checkbox"/>
Inactive Date*	10/19/2019
Status	Not Required
Authorization Number	
Follow Up Date	

**Note:** The new authorization will be created after re-intake.

### Update the Case Record:

1. Navigate to the **Case Details** tab in the client record.
2. Select **Case Details** tab, click **Discharge** button, fill in the discharge dialog pop up with the following:

**Discharge**

Discharge Reason\* Payer Change

Medical Discharge Reason\* 30 - Continue as a patient

End of Care Date\*

Cancel Appointments

Disable Future Cert Periods

Deny Admittance

Denial Reason

Note

- a. **Discharge reason** (Payer Change).
- b. **Medical discharge reason** (Continue as patient).
- c. **End of Care Date** (last day of coverage from previous payer).

3. Click **Accept**.

### Re-Intake Client:

1. Navigate to the **Intakes**.
2. Select **Add Intake**, type patient name in the case record which will generate the **Intake Patient Search** from the *Master Patient Index*.

### Intake Form

[Import Patient CCD](#)

Anticipated Start Date

**Patient**

Name (Last, Suffix, First, Middle)\*

The middle name and suffix are not required

Nick Name

Gender\*

**Case Record Information**

Smith	Suffix	John	Middle Name
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Male  Female

DOB\*

SSN

Medicaid Number

- A patient record should already exist, to avoid duplicate records, **select** the *blue enterprise ID* which will bring up a dialog box, click **Accept**, this will modify and prefill the patient demographics into the case record.

Intake Patient Search : 10 Possible Matches Found <a href="#">Show More</a>						
Enterprise ID	Last Name	First Name	Case Types	Date of Birth	SSN	Medicare MBI
0001285	Smith	John	No Home Health Cases	01/15/2016	000-00-0002	
0001376	Smith	John	No Home Health Cases	04/06/1953	111-11-1111	
0001270	Smith	Mary	No Home Health Cases	09/01/1946	333-22-4444	
0001299	Smith	Mary	No Home Health Cases	09/01/1949	888770000	

**Select Patient** ✕

Patient: Smith, John Doe (0001285)

Nickname:

Gender: Male

Date of Birth: 01/15/2016

Phone #:

Alternate Phone #:

SSN: 000-00-0002

Address: 3700 american blvd west  
Bloomington MN 55431

County:

Time Zone:

Medicare MBI #:

Medicaid #:

Residence Type:

Code Status: Unknown

Case Records: No Home Health Cases

- Complete** the intake following the intake workflow. Make sure to **Add**, not **Edit** the new insurance onto the record.

### Create New Authorization:

**Option 1:**

If authorizations are manually created in your agency or for a payer, follow the process after the readmission.

**Option 2:**

If authorizations are auto generated in your agency from service orders, follow the readmission/ intake process and when the clinician generates service orders the new auth bucket will be created automatically.

### Notes: