

Instructions for creating Insurance Payor Plan

Screens located on Agency > Billing > Payor Plan List

Payor Plan Profile and Agency Plan Profile

This text field is for your identification purposes and can be searched on the payor plan list.

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Select most appropriate type of insurance. *Code is populated on 837P in loop 2000B, segment SBR09.*

Select "Yes" in order to allow encounters to be released to this payor plan.

Select "No"

Select "Chargeable" (BHT06)

Payor Name and Receiver Name are included on 837P. *837P segments are 2010BB-NM103 & 1000B-NM103*

HIPAA Processing Set "UHIN Generic 837/835 (5010)" has been designed to work with most insurances.

Indicate whether the plan requires authorization and if you want UWITS to prevent releasing claims until authorization is entered.

Dates indicate which service dates can be billed to plan.

Select "Yes" to indicate that the payor should acknowledge receipt of batch. *Populated in ISA14*

Should match the Payer Id from <http://www.uhin.org/uhin-payer-list> *Populated in 2010BB NM109*

In most cases, all 3 should match the Trading Partner # from <http://www.uhin.org/uhin-payer-list> *For complex transactions (rare): Interchange Receiver # = ISA08 Application Receiver # = GS03 Receiver ETIN = 1000B NM109*

The screenshot shows the 'Payor Plan Profile' form with the following fields and values:

- Plan Type: Group Insurance
- Plan Name: [Empty]
- Billing Form: 837
- 837 Type: 837I
- Selected 837 Type: 837P
- Company Name: [Empty]
- Agency: [Empty]
- Claim Filing Type: [Empty]
- Client Confidential: [Empty]
- Release To Billing Enabled: Yes
- Eligibility Inquiry Batching Enabled: No
- Transaction Type Code: Chargeable
- Acknowledgement Requested: Yes
- Is Authorization Required?: No
- Effective Date: [Empty]
- Expiration Date: [Empty]
- Reactivated Date: [Empty]
- HIPAA EDI Information:
 - Payor Name: [Empty]
 - Receiver Name: [Empty]
 - Application Receiver #: [Empty]
 - Interchange Receiver #: [Empty]
 - Receiver ETIN: [Empty]
 - HIPAA Processing Set: UHIN Generic 837/835 (5010)
 - Segment Delimiter: ~
 - Element Delimiter: *
 - Composite Delimiter: :

Delimiters indicate how data is segmented in 837. Recommended order is ~ * :

Choose from your UHIN credentials set up in Agency > Billing > Submitter Credential List

Enter your agency trading partner #. *For complex transactions (rare): Interchange Sender # = ISA06 Application Sender # = GS02*

The screenshot shows the 'Agency Profile for Blue Cross Test' form with the following fields and values:

- Billing Form: 837
- Agency Secondary Provider #: [Empty]
- Secondary Provider # Type: [Empty]
- HIPAA EDI Information:
 - TPN: [Empty]
 - Application Sender #: [Empty]
 - Interchange Sender #: [Empty]