

Sending Primary with Secondary



Sending a Primary Claim that has a Secondary Carrier

- Select the **Patient** menu.
- Select the **Insurance** tab.
- The Primary Carrier must have the carrier information entered, including the Insured's information and the Electronic Payer ID, which auto fills from the Carrier screen, and the Insurance Type Code.
- The "Crossover" field must be set to "Y" so that this information is carried through electronically to the Primary Carrier.

The screenshot shows the 'Insurance' tab in the software. At the top, the patient name is 'Cassidy, Sarah' with a balance of 1975.00. Below the navigation tabs, there are three carrier selection buttons: 'P Insured Carrier', 'S Insured Carrier', and 'T Insured Carrier'. The 'Primary' tab is selected. The form contains the following fields:

Carrier (Ins. Co.)	From	Eligibility Check	X	Payer ID	14165	Ins Type Code	MP	
2294	To	Medicare Preferred Care						
1a. Insureds ID#		698887700						
4. Name		First	Middle	Last	SSN	Crossover		
		Sarah		Cassidy	364-10-1010	<input checked="" type="radio"/> Y <input type="radio"/> N		
6. Patient Relationship to Insured (select one)		Self						
7. Address		522 Plaza Blvd						
		City	State	Zip Code				
		Santa Fe	NM	87505				

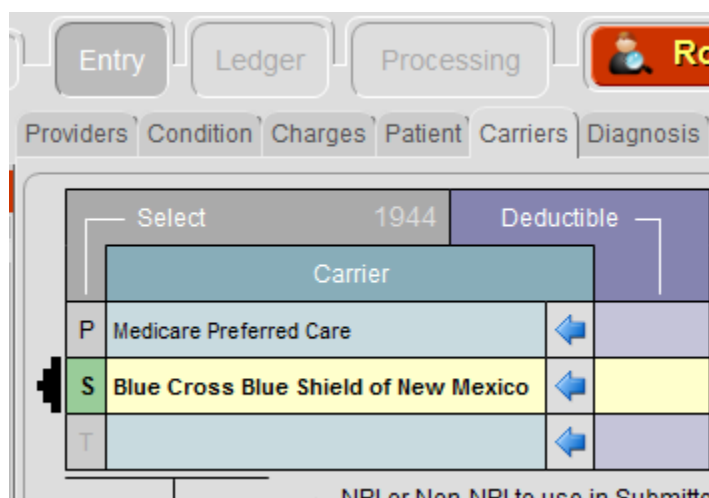
Applying the Primary Payment and Adjustment to the Primary Claim

- Go to **Payments** menu. (Refer to the Payments_Batch and Single Instructions.)
- When applying a batch payment manually, or through an electronic 835 ERA file, be sure to enter the adjustment "Group Code" and "Reason Code", as they are necessary in order to send the Secondary claim electronically.

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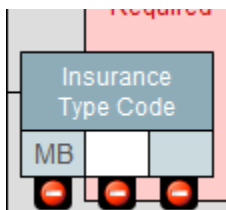
Sending the Secondary Claim

- Note: The Secondary claim will NOT have “Carryover” set to “Y”. This is only done with the Primary Carrier.
- Go to the claim
 - from within the Batch Payment screen after the payments and adjustments have been applied,
 - from within the **Patient** menu, **Claim Ledger** tab, **General** tab, or
 - by doing a search on the **Claims / Invoices** menu.
- Go to the **Carriers** tab.
- Change the selection of selected carrier from the “P” (Primary) to “S” for secondary.



- If the Secondary Carrier is anything but Medicare, remove the “Insurance Type Code” for the Secondary Carrier. If the Secondary Carrier is Medicare, they will want either a 47 if the patient is over 65, in some cases where the patient is under 65 years of age it requires a different code, either a 12, 13, 14, or a 41 etc. stating why the member has Medicare. You can confirm the codes with the Medicare EDI dept if you are not sure.

Sending Primary with Secondary



Updating the Claim Status

- Change the status of the claim to “Ready Elec” so that the claim will get sent in the next electronic batch. Or, if the claim will be printed in batch, set the status to “Ready CMS”, or print by using the Print Form button.

