Product Bulletin

Detailed Guide

Entering Legacy Group and Individual Provider IDs For Payers Not Ready for NPI (Helper v7.3)

email: www.helper.com

If you are transmitting claims to a payer who is not ready for NPI and therefore still wants their legacy Group and Individual Provider IDs, follow this detailed guide for setup instructions.

The group number represents your practice/organization and the individual number represents the actual provider/therapist rendering the service. We are not able to provide you with the proper qualifier as that would have to come from the payer but many of the labels are somewhat self-explanatory, i.e. 1B would be for Blue Shield (professional claims) in most cases.

Group # - This is associated to the Facility library.

1. In the Facility Library – Add or Edit the Entity you need to use for Billing.
2. On the Claim Settings tab – enter the appropriate default ID needed:
    a. NPI
    b. Tax ID (SSN) – Note: This is used when NPI not entered.
    c. To enter multiple IDs for these fields – click on the default and then click Add.
    d. Select the Insurance Company from the list and enter the ID.
3. On the Claim Settings tab – Enter the Group #.
    a. Click on Secondary IDs and then click Add (use the button or right-click to select)
    b. Select the required Qualifier from the list (you are limited to one default qualifier – to enter more see step #4).
    c. Enter the ID number in the Secondary ID field.
    d. Click OK.
4. To enter multiple IDs with the same Qualifier:
    a. Click on the Qualifier listed under Secondary IDs and then click Add.
    b. Select the Insurance Company.
    c. Enter the ID in the Secondary ID field.
    d. Click OK.
5. Click Save.
6. To use the Facility info as the default for Billing:
    a. Go to the Provider/Therapist Library, Select a provider, and then click Edit.
    b. On the Claim Settings tab, lick Billing Entity and then click Edit.
    c. Select Entity Type Non-Person.
    d. Select the Facility from the list that you just created/edited.
    e. Click OK.
7. To use the Facility info Billing just to a specific insurance company:
    a. Go to the Provider/Therapist Library, Select a provider and Edit
    b. On the Claim Settings tab, click Billing Entity and click Add.
    c. Select the Insurance Company from the list.

d. Select Entity Type ‘Non-Person’.

e. Select the Facility from the list that you just created/edited.

f. Click OK.

8. To output on an electronic claim :

a. Go into the Insurance Company Library and click Edit.

b. On the Claim Options tab, click on the Billing Provider Loop (2010AA) and then click Edit List.

c. Select the Qualifier(s) that you need to output (this would be the one that you entered in the Facility Library).

9. To output on a paper claim:

a. Go into the Insurance Company Library and click Edit.

b. Go to the Claim Options tab.

c. Expand Box 33B under 1500 Claim Form (08/05) and then click Edit List

d. Click on the link listed below and select the Qualifier that you need to output. (This would be the one that you entered in the Provider Library.)

Individual Provider # - This is associated to the Provider library.

1. In the Provider Library – Click Add or Edit for the Provider/Therapist.
2. On the Claim Settings tab – enter the appropriate default ID:

a. Taxonomy

b. Billing Entity Type

c. Rendering Entity Type - this should be Person.

d. NPI

e. Tax ID (SSN) – Note: This is used when NPI not entered.

f. To enter multiple IDs for these fields – click on the default and then click Add.

g. Select the Insurance Company from the list and enter the ID.

3. On the Claim Settings tab – Enter the Individual Provider #.

a. Click on Secondary IDs and then click Add (use the button or right click to select).

b. Select the required Qualifier from the list (you are limited to one default Qualifier – to enter more see step #4).

c. Enter the ID number in the Secondary ID field.

d. Click OK.

4. To enter multiple IDs with the same Qualifier:

a. Click on the Qualifier listed under Secondary IDs and then click Add.

b. Select the Insurance Company.

c. Enter the ID in the Secondary ID field.

d. Click OK.

5. Click Save.

6. To output on an electronic claim :
    a. Go into the Insurance Company Library and then click Edit.
    b. On the Claim Options tab, click on the Rendering Provider Loop (2310B) and then click Edit List.
    c. Select the Qualifier(s) that you need output (This would be the one(s) that you entered in the Provider Library).
7. To output on a paper claim:
    a. Go into the Insurance Company Library and then click Edit.
    b. Go to the Claim Options tab.
    c. Expand Box 24J under 1500 Claim Form (08/05) and Edit List.
    d. Click on the link listed below and select the Qualifier that you need to output (this would be the one that you entered in the Provider Library).