



How To: Add an Insurance Company

Go to Insurance Company Add / Amend

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Insurance Company Add/Amend
Ins. Code to Add/Amend [ ]
F3 - Search by Name
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Keys From the Main Menu of the Pharmacy Management System:

- 3. Utility Programs
- 7. Third Party Processing
- 1. Insurance Company Maintenance
- 1. Add/Amend Third Party Record

You should now be at the screen to the left.

Enter a 1-6 character long Insurance Code you would like this new company to be known as. It can contain letters and numbers.

Note: This new code must be unique meaning the code is not used for any other third party.

Check That New Code is Unique

INSURANCE COMPANY MAINTENANCE

```
Insurance Company Code [TEST] Grp Code [    ] Alt Bill Code [    ]
Company/Plan Name [    ]
Submitter (Pharmacy) Name [    ]
Pharmacy Provider # [    ] Qual. [ ] (1-9,A-F,G='99')
Use Drug Notes, (2nd,Both) [ ] (Y,N) [ ] Generic Required
For Third Party Billing [ ] (Y,N)
Claim By Modem [ ] (Y,N,M)
Use Doctor ID Number [ ] (Dea,St#,1-8,Upin,np) Ql. [ ] (1-9,A-F,G)
Use Drug ID Number [ ] (NDC,St#,TP ID.#1-8) Qual. [ ] (1-9,A-F,G)
Printed CF# [ ] Laser Form [    ] Elec CF# [    ]
Modem Switch Code [    ] Allow 'Preferred' Change [    ]
ANSI Bin Number [    ]
Processor Ctrl# [    ] Certification# [    ]
Processor Ctrl# [    ] Certification# [    ]
Cost Selections [    ] (CcBDEFGIOPTtUu)
Misc. Selections [    ] (AabCDdEiImMnNrstZ04RR)
DAW Codes Permitted [    ] (blank = any)
Note [    ]
```

F6 To Start With Another Third Party Record F7 Search Ins. Reference File

Not In File, Will Add I scansi jamesla CAS LEX term

If the code entered is truly unique and has not previously been used, you will be brought to a screen similar to the left. Every field but the "Insurance Company Code" field should be blank. If this is the case, continue to the next slide.

If you see more than just the "Insurance Company Code" field with data in it, this code is used for another third party. **DO NOT** change this third party code or other information. Press F1 to back out and try a different code.

Two possible ways to proceed:

1. Add Based on Another Third Party.

Quicker but if based off a non-standard third party, can be cumbersome to fix.

2. Add from Scratch.

Takes additional time but guarantees the information entered is not for a different third party.

1. Add Based on Another Third Party

INSURANCE COMPANY MAINTENANCE

```

Insurance Company Code [TEST] Grp Code [    ] Alt Bill Code [    ]
Company/Plan Name [    ]
Submitter (Pharmacy) Name [    ]
Pharmacy Provider # [    ] Qual. [ ] (1-9,A-F,G='99')
Use Drug Notes, (2nd,Both) [ ] (Y,N) [ ] Generic Required
For Third Party Billing [ ] (Y,N)
Claim By Modem [ ] (Y,N,M)
Use Doctor ID Number [ ] (Dea,St#,1-8,Upin,np) Ql. [ ] (1-9,A-F,G)
Use Drug ID Number [ ] (NDC,St#,TP ID.#1-8) Qual. [ ] (1-9,A-F,G)
Printed CF# [ ] Laser Form [    ] Elec CF# [    ]
Modem Switch Code [    ] Allow 'Preferred' Change [    ]
ANSI Bin Number [    ]
Processor Ctrl# [    ] Certification# [    ]
Processor Ctrl# [    ] Certification# [    ]
Cost Selections [    ] (CcBDEFGIOPTtUu)
Misc. Selections [    ] (AabCDdEiMmNnrstZ04RR)
DAW Codes Permitted [    ] (blank = any)
Note [    ]
  
```

F6 To Start With Another Third Party Record F7 Search Ins. Reference File

Not In File, Will Add I scansi jamesla CAS LEX term

From this screen, press F6. You will then be prompted for "Insurance Code to Start With". The code you enter here will be copied from. Please enter an insurance that is most similar to the insurance you're adding.

Note: Unless adding another, **do not** copy from any state Medicare insurances as many of them do not follow standard form when billing.

The fields in Insurance Company Maintenance will now be filled with data from the code copied from. Now it is a matter of replacing / cleaning information that is not associated with the new Insurance. These generally include Group Code, Company / Plan Name, ANSI Bin Number, Processor Control # (aka PCN), and Certification #. Other fields may be changed as necessary.

Press Enter to save the new Insurance.

Proceed to slide ??

2. Add Third Party From Scratch

INSURANCE COMPANY MAINTENANCE

```

Insurance Company Code [TEST ] Grp Code [      ] Alt Bill Code [      ]
Company/Plan Name      [TEST THIRD PARTY ]
Submitter (Pharmacy) Name [      ]
Pharmacy Provider #    [1234567890 ] Qual. [1] (1-9,A-F,G='99')
Use Drug Notes, (2nd,Both) [ ] (Y,N) [ ] Generic Required
For Third Party Billing [Y] (Y,N)
Claim By Modem         [Y] (Y,N,M)
Use Doctor ID Number   [n] (Dea,St#,1-8,Upin,mpi) Ql. [1] (1-9,A-F,G)
Use Drug ID Number     [N] (NDC,St#,TP ID.#1-8) Qual. [3] (1-9,A-F,G)
Printed CF#           [ ] Laser Form [      ] Elec CF# [51]
Modem Switch Code     [RSI ] Allow 'Preferred' Change [Y]
ANSI Bin Number       [123456]
Processor Ctrl#       [PCN ] Certification# [CRT ]
Processor Ctrl#       [      ] Certification# [      ]
Cost Selections       [uCFGB ] (CcBDEFGIOPTtUu)
Misc. Selections      [      ] (AabCDdEiMmNnrstZ04RR)
DAW Codes Permitted   [2345678_] (blank = any)
Note                  [      ]
  
```

F6 To Start With Another Third Party Record F7 Search Ins. Reference File

You will need to manually fill in the following fields:

- Company / Plan Name
- Pharmacy Provider # and Qualifier For Third Party Billing
- Claim By Modem
- Use Doctor ID Number and Qualifier
- Use Drug ID Number and Qualifier
- Electronic CF#
- Modem Switch Code
- ANSI BIN Number
- Processor Control Number
- Certification Number
- Cost Selections
- DAW Codes Permitted

The following are generally required field data:

- Pharm Provider # Qualifier = **1**
- For Third Party Billing = **Y**
- Claim By Modem = **Y**
- Use Doctor ID Number = **n**
- Use Doctor ID Qualifier = **1**
- Use Drug ID Number = **N**
- Use Drug ID Qualifier = **3**
- Electronic CF# = **51**
- Cost Selections = **uCFGB**
- DAW Codes Permitted = **2345678**

Hit Enter to Save the Third Party

2. Add Third Party From Scratch

R E Q U I R E D I N F O M A T R I X				
TEST	TEST	THIRD PARTY		
Patient's Sex	[Y]	(All Questions Y or N)		
Card Number	[Y]			
Group Number	[Y]			
Age Status	[]			
Type Contract	[]			
Subscriber's Name	[Y]			
Plan Code	[]	(Y=HomePlan, P=PlanCode)		
Relation to Card Holder	[Y]			
Person Number	[Y]			
Pat in Long Term Care	[]			
Card Expiry Date	[I]			
Date of Birth	[Y]			
Third Party Co-Pay	[]			
Days Supply	[Y]	Total	Period	Year
Patient Note	[]	Scripts		
Long Term Care Fac Code	[]	Cost		
Diagnosis	[]	Retail		
Misc ID	[]	Co-Pay		
Special Case	[]	Since	25 Nov 08	13 Jan 88
Acct/Episode #	[]			

F1-Main Screen

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After hitting Enter to save the previous change, pull up the newly added Third Party profile again. Now press F3 to pull up the screen shown to the left, known as Required Info Matrix.

The following fields are required to be 'Y' on Page 1:

- Patient's Sex
- Card Number
- Group Number
- Relation to Card Holder
- Person Number
- Date of Birth
- Days Supply

The following fields are required to be 'Y' on Page 2:

- Patient's Date of Birth
- Patient's Gender
- Patient's First Name
- Patient's Last Name

Now hit Enter until you return the screen asking for the Insurance Company to Add/Amend.