ChartMaker® Payer Inquiry Quick Reference Card

Practice Manager – Payer Inquiry

Check Eligibility for One Patient

- Select the **Payer Inquiries** Tab.
- In the **Account #** field, enter the patient's account #. *(or use the Lookup button, or F3)*
- Select the **Insurance** you want to request Eligibility information for.
- Click the **Eligibility** tab, then **Request** tab.
- Select the **Submit for Accounts #** radio button.
- Enter the **Provider Code** for the provider.
- In the Request Type field, select **472 Service**.
- In the Service From field, enter "**T**" for today.
- In the Eligibility/Benefit Service Type field, select **30** (long), **98** (short) or insurance specific code.
- Click the **Submit Request** button.
  Your request will now be transferred and you will be taken to the Submitted List tab.
- Click **Refresh**.
- Highlight the applicable **reply** line and then click the **View Reply** button.

Check Eligibility for a Group of Patients

- Select the **Payer Inquiries** Tab.
- Click the **Eligibility** tab, then **Appointment List** tab.
- Enter the **date** of Appointments you need.
- Select **Sort By** Insurance or click **Refresh**.
- Check the **Patients** you want to include in the Eligibility request.
- Click the **Request** tab.
- Select the **Submit for Accounts Selected on Appointment List Tab** radio button.
- In the Requesting Provider field, enter the **Provider Code** for the provider.
- In the Request Type field, select **472 Service**.
- In the Service From field, "**T**" for today's date (or use past date).
- In the Eligibility/Service Type field, select **30** (long), **98** (short) or insurance specific code.
- Click the **Submit Request** button.
  You will be taken to the Submitted List tab.
- Click **Refresh**
- Highlight the applicable reply and then click the **View Reply** button.

Finding More Insurances

Change Healthcare updates the list of insurances that provide eligibility information throughout the year. Follow these steps to check for more insurances to send requests.

- Go to https://access.emdeon.com/PayerLists
- Select the **Eligibility, Claim Status and Referrals** (center) tab
- Enter **Line of Business**: Medical; **Transaction Type**: Eligibility Inquiry and **Response**
- Enter name of **insurance** you are searching (or instead check box for "changed within last month")
- Click the **View List** (green) button
- Find **5 digit ID#** (can contain letters) under Payer ID column to enter as shown on next instructions

All Eligibility requests are free under Provider Complete billing contract. Please contact STI Support if you are not yet billing all gov't insurances through NEIC (Change Healthcare) clearinghouse.

Insurance Setup

- Go to **Administration** > **Transaction Tables** > **Payer Inquiry**
- Click the **Insurance** tab
- Search for the **insurance**
- Click **New**
- In the Payer Inquiry ID field, enter the 5 digit **ID#** from the Emdeon website for this insurance. *(This ID will be applied to every insurance with same billing payer id. IE: All 60054 Aetnas will have same 00002 Payer Inquiry ID when you enter one Aetna.)*
- Click **Apply**
- Click **Save**

Adding Payer Inquiry Tab to Practice Manager

- Go to **Add-Ins** > **Add-in Manager**
- Check the box for **PCRefer Payer Inquiries**
- Click **OK** to close the Add-in Manager Dialog
- Click **OK**

** Payer Inquiry tab will appear the next time you log into Practice Manager.*

Please reference Practice Manager Help for more details and/or call Support at 800-487-9135 if you need assistance with this or any of the steps outlined in this document.