

PC-ACE Pro32 Secondary Insurance Setup

This document is intended as a help guide for entering secondary insurance information in the PC-ACE Pro32 software. It is not intended to replace the general help (accessible by the F1 key) or specific item help (accessible by right-clicking or hitting the F2 key on a specific item) functions, or the *PC-ACE Pro32 User Manual* itself. For assistance with any questions not covered here, please consult these documents.

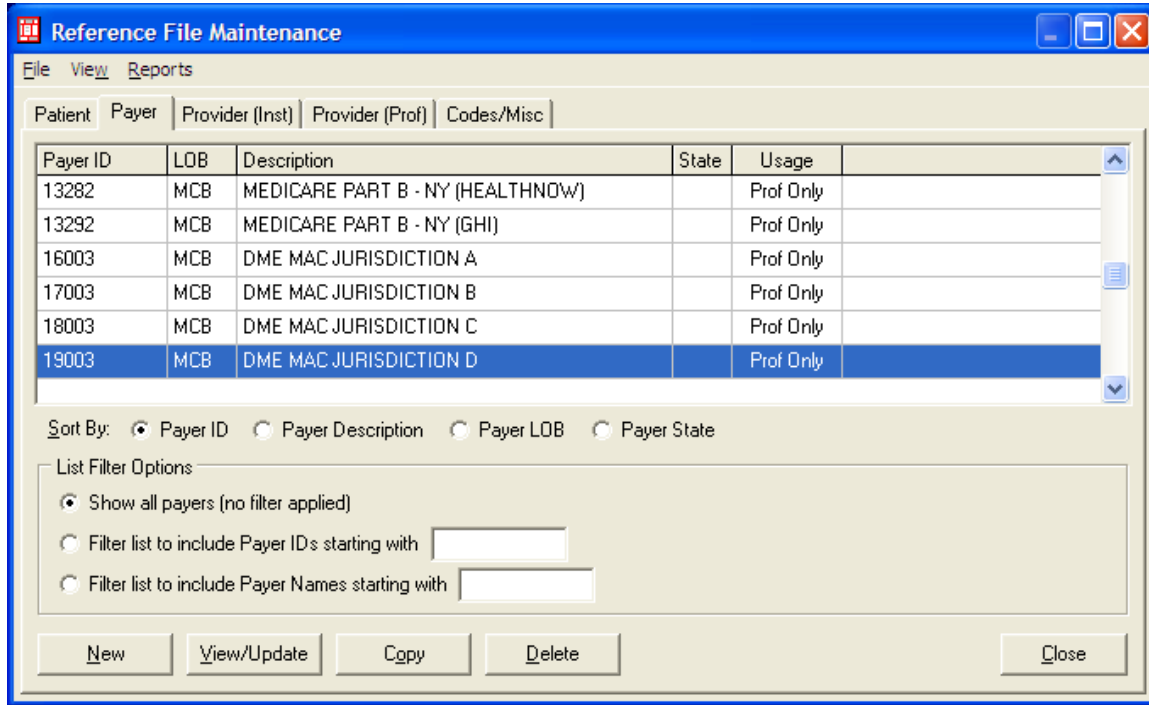
Common Electronic Data Interchange (CEDI) technical support staff is not trained in medical billing. The information in this document is intended to provide the user with enough information in order to successfully enter claims using medical policy knowledge that the user already has. Please contact the Jurisdiction that will be billed with any medical policy questions.

PC-ACE Pro32 was designed for both institutional (Medicare Part A or hospital) and Professional (Medicare Part B, or office visits, and durable medical equipment, or DME) billing. Since this is a DME support document, we will not be covering Medicare Part A or Part B functions.

If you have any questions, please contact the CEDI Help Desk at ngs.cedihelpdesk@wellpoint.com or at 866-311-9184.

Setting Up Secondary Payers

The **Payer** tab on the **Reference File Maintenance** menu is where to set up the insurances that will be used in the software.



To add non-Medicare insurance, for Coordination of Benefits (COB) or Medicare as secondary payer (MSP) purposes, select **New** to add the payer ID.

Note: For more information on how to enter Medicare as secondary payer, please refer to the PC-ACE Pro32 Medicare as Secondary Payer and the *PC-ACE Pro32 User Guide* on the CEDI Web site www.ngscedi.com under Resource Materials.

Payer Information Screen

The screenshot shows a 'Payer Information' window with the following fields and values:

Payer ID	LOB	Receiver ID	ISA08 Override
55002	COM		

Full Description: AMERICAN INCOME LIFE INSURANCE COMPANY

Address & Contact Information:

Address: [Empty]

City: [Empty] State: [Empty] Zip: [Empty]

Contact Name: [Empty]

Phone: [Empty] Ext: [Empty] Fax: [Empty]

Flags:

Source	Media	Usage
CI	E	H

Buttons: PrintLink Matching Descriptions, Save, Cancel

Payer ID

- A valid Coordination of Benefits Agreement (COBA) ID obtained from the Coordination of Benefits Contractor or from the CMS Web site at www.cms.hhs.gov/COBAgreement/.
- A five-digit Payer ID obtained from the secondary insurance company
- A gap-fill ID of XXXXX for cases where a Payer ID is not available

LOB (line of business): Use the right click or F2 key lookup function for valid entries.

Note: The **Payer ID** and **LOB** (line of business) combination must be unique. Every effort to obtain a valid Payer ID should be made, as multiple entries for the gap-fill ID XXXXX will not work.

Use the right-click or F2 key lookup function to fill out the other fields indicated in the screenshot above.

Blank fields in the screenshot (shown above) should only have data entered at the direction of CEDI technical support.

Selecting Secondary Payers

If the patient has a secondary insurance, the insured party will be added on the **Secondary Insured** tab. The secondary insurance can be set to be a common insurance for both Institutional and Professional claims, or it can be set to have a different insurance for each type of claim.

Use the **Patient** tab under **Reference File Maintenance** to select/enter the DME patient you would like to add a secondary insurance.

Under **Secondary Insured**, select **Separate Inst & Prof** to get a tab specifically for **Secondary Insured (Prof)**.

The screenshot shows a software window titled "Patient Information" with a blue header and a close button (X) in the top right corner. The window has several tabs: "Extended Info", "Primary Insured (Inst)", "Primary Insured (Prof)", "Secondary Insured" (which is selected), and "Tertiary Insured".

Under the "Secondary Insured" tab, there are input fields for "Payer ID", "Payer Name", "LOB", "Group Name", "Group Number", and "Claim Office". To the right of these fields is a section titled "Insured Information Options" with two radio buttons: "Common Inst & Prof" (which is selected) and "Separate Inst & Prof". A black oval highlights this section. Below the radio buttons is a button labeled "Clear All Fields For Insured".

Below the "Insured Information Options" section are two sub-sections: "Insured Information (F7)" and "Employer Information (F8)". The "Insured Information (F7)" section contains fields for "Rel", "Last Name", "First Name", "MI", "Gen", and "Insured ID". The "Employer Information (F8)" section contains fields for "Address", "Sex", "DOB", "City", "State", "Zip", "Employ Status", "Assign of Benefits", "Release of Info", "ROI Date", and "Retire Date".

At the bottom of the window are "Save" and "Cancel" buttons.

The **Secondary Insured (Prof)** tab is filled out in the same fashion as the **Primary Insured (Prof)** tab.

Right-click or use the F2 lookup feature to select the secondary payer. This should fill in the Payer ID, Payer Name, and LOB (Line of Business) fields.

The screenshot shows a software window titled "Patient Information" with a blue header and a close button. It has several tabs: "Primary Insured (Inst)", "Primary Insured (Prof)", "Secondary Insured (Inst)", "Secondary Insured (Prof)", and "Tertiary". The "Secondary Insured (Prof)" tab is active. The form contains the following fields and values:

Payer ID	Payer Name	LOB			
55002	AMERICAN INCOME LIFE INSURA	COM			
Group Name	Group Number	Claim Office			
Insured Information (F7) Employer Information (F8) Clear All Fields For Insured					
Rel	Last Name	First Name	MI	Gen	Insured ID
18	SMITH	JANE			SMITHJ202
Address		Sex		Assign of Benefits	
10180 KNUE AVE		F			
		DOB		Release of Info	M
		09/16/1928			
City	State	Zip	Employ Status	ROI Date	01/01/2009
INDIANAPOLIS	IN	46250-____			
Country	Phone		Retire Date		__/__/__
	(866) 311-9184				

Buttons: Save, Cancel

Group Name and **Group Number**: These are only entered if they are indicated on the patient's insurance ID card.

Claim Office: This will most likely be blank unless indicated on the insurance ID card.

Insured Information (F7)

Rel: Select the relationship of the patient to the insured party.

- If the relationship is **18 – Self**, this will fill out the rest of the information.
- Use the right click or F2 lookup function to make the appropriate choice.

Insured ID

- Enter the patient's ID number as it appears on their insurance card.

When a claim is entered for this patient, both the primary and secondary insurance information will be placed in the **Insured Information** tab.

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