Managing Payer Association

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ollaborateMD allows you to associate your contracts directly to your payers. This allows you to run eports on your contracts based on payer and see your contracts from the payers screen. To learn how to iew your payer contracts, please visit our Manage Payers Contracts Help Article.

1. Select **Customer Setup** > **Codes...** > **Contracts**.
2. Use the **Show All** button to view all contracts. Or use the **Search** field to further drill down your search
3. Select the **Contract**.
4. Locate **Payers** form the right-hand side panel and click to expand.
5. Click the **Add Payer Association** button to associate new payers with this contract.
6. Use the **Payers** drop-down menu to select the payer(s).
7. Select how the contract should **Apply to the Payers**:
    1. Place a check in the **Apply based on the claims date of service** box to apply this contract based o the date of service.
        1. Set the **Effective Date** and **Termination Date**.
    2. Place a check in the **Apply based on the location or provider** box to apply this contact based on the location or provider used.
        1. Select whether to use **Practice, Provider, Office, Facility** or **Tax ID**.
    3. Place a check in the **Apply based on place of Service** box to apply this contract based on the plac of service used.
        1. Select whether to use **Any Non-Facility Place of Service, Any Facility Place of Service** or **POS Code.**
    4. Place a check in the **Apply based on modifier** box to apply this contract based on the Modifier used.
        1. Select whether to use **Modifier(s)**.
    5. Place a check in the **Apply based on value code** box to apply this contract based on the value cod used.
        1. Select whether to use **Value Code.** When selected, users will have the opportunity to enter single Value Code and Amount (optional).

> 🪄 The correct contract will be matched based on the Value Code and Amount (if present) when applying a payment. Please note that the system will continue to apply the contract with the highest matching criteria.

6. Place a check in the **Apply a Single Case Agreement** box to apply to a specific patient.
    1. Use the **Patient Search** menu to select the patient from your patient list.

> 🪄 Out-of-network providers may treat specific patients under special circumstances, such as continuity of care or a lack of local in-network options. This is formalized through a **Single Case Agreement**, a contract specific to one patient rather than a broad payer relationship.

8. Click **Done**.
9. ***Optional***: You can remove an association by clicking on the 🗑 icon to the right of the payer name.
10. Click **Save**.