


Add a New Electronic Payer


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Follow the steps below to add a new electronic payer.


1. Select **Customer Setup > Payers**.
2. Click the **New Payer** button.
3. Click **Yes**, when the "Would you like to configure a Clearinghouse connection for this payer?" displays.

 Clicking **No** will set up the Payer as a Paper Payer.


4. Use the **Master Payer Search** window to locate your payer.
 1. Search for the Payer by using the name or Payer ID, then click **Search**.
 2. Select the **Payer**.

 Unable to locate a connection with a specific payer in CollaborateMD? This may indicate that ePS does not have an electronic connection with that payer, and the payer is not on the master list. To request that ePS add an electronic connection for a payer, please contact your support or implementation specialist.


5. **Optional:** Add the **Plan Name**.

 This information does not appear on the claim.

6. The **Payer Type** is auto-selected based on the Payer you choose in the Master Payer Search. Changes should only be made to the **Payer Type** drop-down menu if you've been advised by the payer to do so.
7. The **Default Billing Status** is auto-selected as "new charges created" for this payer. You can manually change the status of the charges here or during claim creation.
8. Use the **Clearinghouse Processing Mode** drop-down menu to tell the server how to process the claim after it's been created.
 1. **The clearinghouse will send the claims electronically:** Select this option to have the clearinghouse submit the claim to the payer electronically.

 If a payer requires an agreement to be filled out please confirm that you have been authorized to submit the claim electronically prior to doing so. Otherwise, the claim can either be dropped to paper and mailed to the payer (in this event please make sure the **Contact Information** for the payer is accurate) or the claim will be rejected in the event you are submitting a claim to a payer that does not accept paper claims, i.e. Medicare payers.

2. **The clearinghouse will print and mail the claims** Select this option to have the clearinghouse print and mail the claim to the payer for a fee.

 Not all payers accept paper claims (i.e., Medicare and payers with a South Carolina address). In the event a payer does not accept paper claims the claim will be rejected by the clearinghouse with the following rejection reason, "64 INVALID CARRIER DIRECT CPID 4301".

3. **Do not send claims to the clearinghouse for processing** Select this option to **NOT** have the clearinghouse process claims electronically or on paper. In the event this option is selected please be sure you are properly dis-positioning the necessary claims to their appropriate statuses.

9. The **Sequence#** is auto-populated by CollaborateMD once the payer is saved.

10. The **Reference#** can be created to further identify the payer.

11. Enter the **Contact Information** used to mail any claim(s) to this payer.


 Reference the Patient's Insurance Card or contact the Payer directly.

12. Enter any applicable **ID Numbers** for the payer.

13. **Optional:** You can override the practice info on the claim by placing a check in the **Use alternate practice info** box.

1. For electronic claims, select whether to override the **Pay-To** or **Main Address**.

2. Enter the practice info that should populate on the claim.

 Ensure the Bill Mode set for the billing provider is set to "Group" under the Provider section or the Provider tab of the Billing Options.

14. Click **Save**.



If the payer requires a signed agreement before professional or institutional claims can be submitted electronically, you will receive a pop up warning you not to send claims electronically until the agreement has been completed and approved.

Please note that claims cannot be sent electronically until the agreement is complete. **Any claims that you do send electronically will be sent on paper by the clearinghouse.**

To prevent paper claims from being printed, update the Payer's Clearinghouse Processing Mode to be **"Do not send claims to the clearinghouse for processing"**. Any other processing mode will cause the claims to be printed by the clearinghouse.

Once the agreement is in place, you can update the Processing Mode to "The clearinghouse will send the claims electronically" to submit all held claims.

Save Anyway

Cancel