

How To Copy A Payer To A New Program

Question: I want to create a payer in a different program. The payer is currently listed under our Program 1. Is there a way I can copy over information, to Program 2, without having to enter duplicated data?

Answer: Yes, there is. This Copy feature will allow you to copy over one payer's information into another. The following information will be copied: Payer Basic Setup, Contact Information, Payment Posting Setup, and Electronic Claim Information. (**NOTE:** For payment posting setup, you will still need to create those codes under **Accounts Receivable>Pay/Adj Codes.**) Here are the instructions on how to copy a payer:

From the main screen in Barnestorm Office, go to:

1. **Codes**
2. **Program Related Codes**
3. **Payer Codes**
4. Type in the program number (of the payer you want to copy).
5. Select the "Add a New Payer" tab to pull up a list of available codes.
6. Pick a payer code and write it down. This will be needed in Step 10.
7. Select the "Add a New Payer" tab again to return to screen.
8. Type in the payer code (of the payer) that you want to copy.
9. Select **Copy To A New Payer** tab towards bottom of screen.

(A new section will appear in the middle, right of the screen.)

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The screenshot shows a software interface with a grey background. On the left, there are several rows of settings, each with a label and two radio buttons. The settings are: Billing Format (Q), Pay Class (R), Stat Class (X), Hospice (Y/N), Per Diem (Y/N), PPS (Y/N), Use Medicare HCPCS (Y/N), and Hospice 60-day Certs Only (Y/N). To the right of these settings, there is a text label: "32=PPS, 33=HH, 34=FluShots, 81=Hospice". Further right, there are three input fields: "New Program" (a small box), "New Payer" (a small box), and "Description" (a long box). Below the "Description" field are two buttons: "Copy" and "Cancel".

10. Fill in the New Program #, and the New Payer # (from Step 6).
11. Fill in the description, for example Blue Cross Blue Shield.
12. Select **Copy**. At the right of the screen, under Search For, you will see confirmation the payer was added successfully.

The screenshot shows a search bar with the text "Search for" on the left. To the right of the search bar, there is a message: "Payer # 01/021-BCBS COPY Added Su".

NOTE: Type of Bill 33X is no longer used in HH, as of October 1, 2013.

Knowledgebase

<http://kb.barnestorm.biz/KnowledgebaseArticle50786.aspx>