Claim Settings Guide
November 2009

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1. Introduction

This guide shows you how to configure your provider numbers and claim settings in Kareo that are used for formatting electronic claim submisssions and paper claim printing. It is important to note that the instructions included in this guide apply only to customers that signed up for a Kareo account on or after November 7, 2009 and are configured to use the **New Mode** (see the important note below for more details).

Before the recent industry transition to the new National Provider Identifier (NPI) standard, each government payer and commercial insurance company assigned their own, payer-specific provider and group numbers. These so-called "legacy numbers" made it very difficult for providers to configure practice management systems, like Kareo, for electronic and paper claims since each practice and provider had literally dozens of different numbers to track. But now, most government payers and commercial insurance companies no longer require these legacy numbers. Instead, the only requirements for most payers today is a tax ID number (either an Employer's Identification Number or Social Security Number) and the provider's group and individual NPI numbers.

In this guide, you will learn how to configure the practice and provider settings that are required for the proper formatting of electronic claim submissions and paper claim printing. You will also be provided with clear examples of what information is typically required by each of the major payers so that you can avoid some of the common configuration problems that may result in claim rejections.

IMPORTANT NOTE:

Kareo has two different modes for configuring the tax ID, National Provider Identifier (NPI), provider number, and group number settings that are used for formatting electronic claim submissions and paper claim printing. All customers that signed up for a Kareo account ON OR BEFORE November 6, 2009 are configured to use the **Classic Mode**. All customers that signed up for a Kareo account AFTER November 6, 2009 are configured to use the **New Mode**. The instructions in this guide apply only to customers that are configured to use the **New Mode**. If you need help in configuring claim and provider settings for the **Classic Mode**, please refer to the guide entitled **Kareo Providers and Group Numbers Guide**. If you would like to find out which claim settings mode is used by your account, click on the **Settings** menu, then click **Company**, and then click **Claim Settings Mode**. If your account is configured to use the **New Mode**, then the **Claim Settings Mode** field will read **New**. If your account is configured to use the **Classic Mode**, then the **Claim Settings Mode** filed will read **Classic**.

2. Configuring Practice Settings

In this section, you will learn how to configure the practice settings that are required for proper formatting of electronic claim submissions and paper claim printing. It is important to note that these settings apply to both single-provider practices and group practices.

Follow these steps to configure your practice settings:

1. Select the menu item **Settings** and then click **Practice Information**.

2. Make sure the following information is entered:

    - Name: Enter the name of the practice, or enter the name of the provider if it's a single provider practice. If entering a provider name as the practice name, enter the full name and degree (e.g., John G. Smith, MD; or Caroline R Lee, DO). Note: The name entered must be no longer than 35 characters in length, including blank spaces between words.

    - EIN: Enter the Employer Identification Number (EIN) assigned by the IRS to your practice. This applies to any business entity including a Corporation, LLC, LLP, Partnership, or other taxable business entity. If your practice is a sole proprietorship, DO NOT enter the Social Security Number (SSN) of the provider in this field.

    - Group NPI: Enter the National Provider Identifier (NPI) number for the practice.

    - Specialty: Click the Specialty button and select the group's main specialty from the pre-set list of Provider Taxonomy Codes. Use the search feature to locate the code. To use the search feature, enter a one or two-word identifier (keyword) in the Look For box, and then select the field to search across from the drop-down list in the Search In box (e.g., All Fields, Taxonomy Code, Specialty Name, Taxonomy Classification). Note: The Taxonomy Codes are defined by the American Medical Association and the Department of Health and Human Services, Centers for Medicare and Medicaid Services. The list of Taxonomy Codes are updated and maintained by Kareo.

    - Address: Enter the practice's street address (including suite number or other secondary unit designator, if applicable), and then enter the zip code. Once you tab out of the address box, the system will automatically populate the city and state for you. (If a two-line street address, be sure to enter the zip code on a separate line, see Using City/State Auto Complete.)

3. Configuring Provider Settings

In this section, you will learn how to configure the provider settings that are required for proper formatting of electronic claim submissions and paper claim printing.

3.1 Entering General Provider Information

Follow these steps to access a provider record or to enter a new provider record:

1. On the **Settings** menu, click **Providers**. This opens the **Find Providers** task or (browser).
2. If you have not yet set up the provider record, click the **New** button at the bottom of the browser and enter the general provider information under the "General" tab of the provider record.
3. If the provider has already been set up in the system, double-click on the provider name within the browser window to open the Provider record.
4. Since the focus of this document is not on how to set up provider records in Kareo, but instead, how to setup the claim settings correctly in order to successfully submit claims to the insurance payors, we will not go into great detail on how to complete the "General" section of the provider record. If you should have questions as to how to complete this section of a provider record, refer to the Implementation Guide or refer to Online Help or the Kareo User Manual (under the section entitled "Setting up Providers").

   We do, however, want to call your attention to a few of the fields under the "General" tab that must be completed correctly in order to process paper and electronic claims. These fields are as follows:

   - **NPI**: As stated before for most payors the NPI is all that's required on the claims for the rendering provider. To avoid claim rejections, make sure that the provider's NPI number is entered on all provider records.

   - **SSN**: Enter the provider's Social Security number if the provider will be billing under their own Social Security Number rather than the Practice's Tax ID. You can also enter the provider's SSN here if you wish to keep it for your records.

   - **Specialty**: Click the **Specialty** button and select the provider's main specialty from the list of Provider Taxonomy Codes maintained by the system. Use the search feature, if necessary, to locate the specialty. (Note that Medicaid now requires that the rendering provider's Taxonomy code be printed in Box 33b of the new CMS 1500 Claim Form Version 08/05 when billing on paper rather than electronically. (See Section 6, "Insurance Company Paper Claim Settings" for more information.)

   - **Degree**: Enter the provider's degree (e.g., MD, DO, PhD, etc.)

   Remember, these fields must be completed for all providers within your practice who will be named as the rendering, supervising, or referring provider on claims.

5. Once you finish entering the provider's general information, you will click on the **Claim Settings** tab to complete your setup for claims.

3.2 Configuring General Claim Settings

Under the Claim Settings tab on the New Provider task, enter the settings that are used for formatting electronic claim submissions and paper claim printing, including:

1. **NPI:** If the provider is credentialed with payers to send claims with both a Group and Individual National Provider Identifier (NPI), then select **Bill with Group and Individual NPI**. If, instead, the provider is credentialed with payers to send claims with only an Individual NPI, then select **Bill with Individual NPI**.
2. **Override Group NPI?:** If you previously selected **Bill with Group and Individual NPI** in the NPI field and you need to send claims for this provider with a Group NPI that is different than the Group NPI entered on the **Practice Information** screen, then check this box and enter a different NPI in **the Override Group NPI** field.
3. **Tax ID:** If the provider is credentialed with payers to send claims using an Employer Identification Number (EIN) assigned by the IRS to the practice, then select **Bill with EIN**. This applies to any business entity including a Corporation, LLC, LLP, Partnership, or other taxable business entity. If, instead, the provider is credentialed with payers to send claims using the provider's Social Security

Number (SSN), then select **Bill with SSN**. This might be the case if your practice is a sole proprietorship and has not been assigned an EIN from the IRS.

4. **Override EIN?:** If you previously selected **Bill with EIN** in the Tax ID field and you need to send claims for this provider with an EIN that is different than the EIN entered on the **Practice Information** screen, then check this box and enter a different EIN in the **Override EIN** field.

These steps will take care of your claim setup for the vast majority of payors. In the next section, you will learn how to configure the override your general claim settings for specific insurance companies or service locations as may be required in certain situations.

3.3 Overriding Claim Settings for Specific Payers or Locations

Follow these steps to configure payer, provider, or service location specific claim settings.

1. Open a **Provider** record and click on the **Claim Settings** tab.

2. In the **Override Claim Settings** section, click on the **Add** button. This displays the **Override Claim Settings** screen.

3. **Insurance Company:** Click the **Insurance Company** button to select the name of the insurance company for which you would like to override your general claim settings. If you would like to override your claim settings for a specific location and all insurance companies, lease this field blank.

4. **Location:** Select the **Location** for which you would like to override your general claim settings.

5. **NPI:** If the provider is credentialed with this payer to send claims with both a Group and Individual National Provider Identifier (NPI), then select **Bill with Group and Individual NPI**. If, instead, the provider is credentialed with this payer to send claims with only an Individual NPI, then select **Bill with Individual NPI**.

6. **Override NPI?:** If you need to enter a Group or Individual NPI that is different than your general claim settings, then check this box and enter an **Override Individual NPI** and/or **Override Group NPI**.

7. **Tax ID:** If the provider is credentialed with this payer to send claims using an Employer Identification Number (EIN) assigned by the IRS to the practice, then select **Bill with EIN**. This applies to any business entity including a Corporation, LLC, LLP, Partnership, or other taxable business entity. If, instead, the provider is credentialed with this payer to send claims using the provider's Social Security Number (SSN), then select **Bill with SSN**. This might be the case if your practice is a sole proprietorship and has not been assigned an EIN from the IRS.

8. **Override EIN or Override SSN?:** If you previously selected **Bill with EIN** in the Tax ID field and you need to send claims for this provider with an EIN that is different than the EIN entered on the **Practice Information** screen, then check this box and enter a different EIN in the **Override EIN** field. If you previously selected **Bill with SSN** in the Tax ID field and you need to send claims for this provider with an SSN that is different than the SSN entered on the **Provider** screen, **General** tab, then check this box and enter a different SSN in the **Override SSN** field.

9. If the payer requires legacy group or provider numbers, or a submitter number on their claims check the **Show advanced settings** box and enter the following information:

    - **Advanced Paper Claim Settings**: this section is used for payers that require legacy numbers on paper claims. Using the drop down menu select the type of number the payer requires then type in the corresponding number on the right hand side.

    - **Advanced Electronic Claim Settings**: this section is used for payers that require legacy numbers on electronic claims. Using the drop down menu select the type of number the payer requires in the "Type" section then type in the corresponding number in the "Value" section.

    - **Submitter Number**: This section is used for payers that require a submitter number in addition to the group and/or provider NPI number on their electronic claims. The submitter number is assigned by the payer once they receive, process, and approve your payer agreement. Once you agreement is approved the payer you send you/ the provider an approval letter the submitter number will be on this letter. Once you have it enter it in this field.

    - **Advanced Eligibility Settings**: This section is used for payer specific eligibility settings and will not be covered in this document, please refer to the Kareo Real-Time Patient Eligibility guide for assistance with this setting.

Once you have configured the necessary settings please make sure to save in order for you settings to take effect.