

# Searching Enrolled Payers First

07/24/2024 8:25 pm EDT

In DrChrono you have the ability to prioritize the payers you are enrolled with so that they are brought to the top of the list when searching for insurance payers.

In the image below, there are several options for the payer being searched. If the desired payer is not at the top of the list, we can enable a setting so that your preferred payers show at the beginning of the list, making them easier to find.

In this article, we will look at enabling the setting to search enrolled payers first and adding payers to prioritize the list.

Important Demographics Insurances Eligibility Authorizations Smoking Status Flags Balance onpatient Payments

✓ Sufficient patient demographics to bill insurance.

Primary Ins Secondary Ins Tertiary Ins Auto Accident Worker's Comp Durable Med Eqpt

Primary Insurance Save to Insurance History Patient Insurance History

Subscriber is the Patient  Insured person is the same person as the Patient

Insurance Company  \*contact support if you can't find an insurance company.

Carrier Payer ID	60054: Aetna PO Box 981106, El Paso, TX 79998
TPL Code	PRNT1682: Aetna Aetna P.O. Box 13441, Pensacola, FL 32591
Insurance ID Number	PRNT1914: Aetna Aetna P.O. Box 14079, Lexington, KY 40512-4079
Insurance group name	60054: Aetna KY P.O. Box 14079, Lexington, KY 40512-4079
Insurance group number	PRNT873: AETNA PPO
Insurance plan name	AETNA PPO p.o box 981106, El paso, TX 79998
Insurance plan type	13383: Orthonet- Aetna Claims M.D PO BOX 1177 , PECOS, NM 87552
Insurance claim office number	26337: Aetna - IL Medicaid PO BOX 66545 , Phoenix, AR 85082
Number visits allowed per year	34734: Aetna Better Health Inc.
Card issued date	38692: Aetna TX Medicaid & CHIP P.O. Box 569150 , Dallas, TX 75356-9150
Primary Insurance Notes	50023: Aetna Better Health of Ohio 128KS: Aetna Better Health of Kansas 42130: Aetna Better Health of Nebraska 128MO: Aetna Better Health of Missouri

## Set-Up for your account

1. Go to **Account > Provider Settings**.

ACCOUNT SETTINGS

User Settings

Provider Settings

Outpatient Settings

Account Setup

Custom Fields

Copy Dashboard (Beta)

API

App Directory

PRACTICE SETTINGS

Offices

Facilities

Staff Members

Staff Permissions

eRx Settings

2. Click on the **Medical Billing** tab.

# Account Settings

Profile General Email **Medical Billing** eRx Info Services Usage My Billing Sample Data Security Patient Payments

## Medical Billing

Default Billing Provider	<input type="text" value="-----"/>	
Billing NPI	<input type="text"/>	Required for eRx & billing. Group NPI can be same as rendering NPI #
Rendering Provider NPI	<input type="text"/>	Individual Provider NPI #. Leave blank if the same as billing NPI
Practice Official Name	<input type="text"/>	
Practice Tax ID	<input type="text"/>	
CLIA Number	<input type="text"/>	Optional: For CLIA certified labs
CLIA # Expiration	<input type="text"/>	Optional: Expiration date of CLIA #
Billing Taxonomy Code	<input type="text" value="208D00000X"/>	Optional: Leave blank to let the system choose
Rendering Taxonomy Code	<input type="text" value="208D00000X"/>	Optional: Leave blank to let the system choose
Individual Medicare PTAN	<input type="text"/>	
Group Medicare PTAN	<input type="text"/>	
Individual BCBS Number	<input type="text"/>	
Group BCBS Number	<input type="text"/>	

3. Scroll down to the **Miscellaneous** section. Check the **Search Enrolled Payers First** box and **Update Entire Profile**.

## Miscellaneous

Default ICD Code Version  The default icd version (icd-9 or icd-10) for new created appointment

Copying billing respects provider  "Copy Last Billing" in billing profiles dropdown and "Auto Copy Procedures" copy billing data from the last appointment scheduled by you.

Copy Proc From Pt's Last Appt  Auto copy procedures from patient's last appointment when scheduling a new professional appointment (won't take effect when new appointment is having billing profile attached).

Copy Dx From Pt's Last Appt  Auto copy diagnosis from Patient's last appointment when scheduling a new professional appointment.

Copy Dx From Pt's Problem List  Auto copy diagnosis from patient problem list when scheduling a new professional appointment (won't take effect when Copy Diagnosis From Patient's Last Appointment is checked).

Auto Set Problems  Automatically adds ICD10 codes to patients problem list when appointment is created or edited

Auto Set Billing Status  Change the billing status to "Paid in full" and "Balance due" when ERA is received

Change the billing status to "Paid in full" and "Balance due" from billing screen

Change the billing status to "Paid in full" and "Balance due" when patient's payment is applied

Change the billing status to  when the note is locked and the billing status is blank. Only custom billing statuses are supported.

Balance Writeoff  Auto-write-off patient balance when claim is changed to "Settled"

Auto-write-off insurance balance when claim is changed to "Settled"

Default Patient Payment Profile

Include patient problems in clinical note

**Search Enrolled Payers First**  Prioritize enrolled payers in insurance section of patient demographics

Auto-populate claims with referring/ordering provider if blank

[Update Entire Profile](#)

## Adding Payers

1. To add a payer go to **Billing > Insurance Setup**.

Billing	Account	Marketplace	Help
<b>BILLING</b>			<b>BUSINESS INTELLIGENCE</b>
Billing Summary			Denial Analysis
Live Claims Feed			Payment Analysis (beta)
Apollo Plus			<b>CODING</b>
Patient Payments			Code Search
Day Sheet			New Custom Procedure
Transactions			Custom Procedures
Remittance Reports			<b>INSURANCE</b>
Unmatched ERAs			Bulk Edit Payer IDs
Insurance Credit Card Payments			<b>Insurance Setup</b>
Accounts Receivable			Payer Search
Patient Statements			
Product/Procedure			
Patient Balance Ledger			
Fee Schedule			
Underpaid Items			
Adjustment Master			
Sales Tax			
Billing Log			

2. Click **+New EDI Enrollment**.

Required info for Provider

All of this info should be in the system. If it's missing we cannot submit billing for the Healthcare Provider.

Organization Name:	Dr. Nick's Walk-In Clinic
Tax ID:	123456789
Billing NPI:	1234567890
Rendering Provider NPI:	555555555
DEA #: (optional)	None
Legacy Blue Shield ID: (optional)	
Legacy Blue Cross ID: (optional)	
Legacy Medicaid ID: (optional)	
Emdeon Go-Live Date:	None *drchro staff has to set this up once all other work is done.

Enrollments for Brendan Wilberton

3. Click **+Add New Payer.**

EDI Enrollment for Brendan

Brendan

Springfield General Practice

225 Schilling Circle  
21212, MD, Baltimore, US

Payer ID	Payer name	NPI	Tax ID	Claim Status	ERA Status	Eligibility Status	Note from support
87726	UnitedHealthcare	Group NPI Number	Tax ID Number	Unsubmitted	Unsubmitted	Approved	
87726	AmeriChoice of Maryland	Rendering NPI Number	Tax ID Number	Unsubmitted	Unsubmitted	Approved	
62308	Cigna	Group NPI Number	Tax ID Number	Unsubmitted	Unsubmitted	Unsubmitted	
87726	AARP Medicare Complete by SecureHorizons	Group NPI Number	Tax ID Number	Unsubmitted	Unsubmitted	Approved	

[+ Add New Payer](#) 

[Save and submit changes to support](#)

4. You can search by **Payer ID** or **Payer Name**. Select the payer once you have found it.

Springfield General Practice

225 Schilling Circle  
21212, MD, Baltimore, US

Payer ID	Payer name	NPI	Tax ID	Claim Status	ERA Status	Eligibility Status	Note from support
87726	UnitedHealthcare	Group NPI Number	Tax ID Number	Unsubmitted	Unsubmitted	Approved	
87726	AmeriChoice of Maryland	Rendering NPI Number	Tax ID Number	Unsubmitted	Unsubmitted	Approved	
62308	Cigna	Group NPI Number	Tax ID Number	Unsubmitted	Unsubmitted	Unsubmitted	
87726	AARP Medicare Complete by SecureHorizons	Group NPI Number	Tax ID Number	Unsubmitted	Unsubmitted	Approved	

[+ Add New Payer](#)

[Save and submit changes to support](#)

Claims Address: P.O. Box 61808 Phoenix, AZ 85082-1808  
 (Gateway P) 23228: Aetna Better Health - PA Medicaid  
 Claims address: Po Box 62198, Phoenix, AZ 85082-2198  
 (Gateway P) 26337: Aetna Better Health - IL Medicaid  
 Located in Chicago, Illinois  
 (Gateway P) 46320: NJ Aetna Better Health of New Jersey  
 Claims address: P.O. Box 61925 Phoenix, AZ, 85082-1925  
 (Gateway I) U2130: NE Aetna Better Health of Nebraska - UB  
 Claims address: P.O. Box 63188 Phoenix, AZ 85082

5. Next you can **+Add New Payer** or click **Save and Submit Changes to Support** to save your changes.

### Springfield General Practice

225 Schilling Circle  
21212, MD, Baltimore, US

Payer ID	Payer name	NPI	Tax ID	Claim Status	ERA Status	Eligibility Status	Note from support
87726	UnitedHealthcare	Group NPI Number	Tax ID Number	Unsubmitted	Unsubmitted	Approved	
87726	AmeriChoice of Maryland	Rendering NPI Number	Tax ID Number	Unsubmitted	Unsubmitted	Approved	
62308	Cigna	Group NPI Number	Tax ID Number	Unsubmitted	Unsubmitted	Unsubmitted	
87726	AARP Medicare Complete by SecureHorizons	Group NPI Number	Tax ID Number	Unsubmitted	Unsubmitted	Approved	
46320	Aetna Better Health of New Jersey	Group NPI	Tax ID				

+ Add New Payer

OR

Save and submit changes to support

6. The payer list will prioritize which payers will appear at the top of the payer search.

### Enrollments for Brendan

Payer id	Payer Name	Specialty	Proc Days	Bal Bill	Acc Assg	Group #	Indv #	Billing NPI	Eligibility NPI	Provider Name	Tax ID Number
46320	Aetna Better Health of New Jersey		30	No	No			Group NPI Number (1234567890)	Group NPI Number (1234567890)	Practice Name (Dr. Nick's Walk-In Clinic)	Tax ID Number (123456789)
62308	Cigna		30	No	No			Group NPI Number (1234567890)	Group NPI Number (1234567890)	Practice Name (Dr. Nick's Walk-In Clinic)	Tax ID Number (123456789)
87726	AARP Medicare Complete by SecureHorizons		30	No	No			Group NPI Number (1234567890)	Group NPI Number (1234567890)	Practice Name (Dr. Nick's Walk-In Clinic)	Tax ID Number (123456789)
87726	AmeriChoice of Maryland		30	No	No			Rendering NPI Number (5555555555)	Group NPI Number (1234567890)	Practice Name (Dr. Nick's Walk-In Clinic)	Tax ID Number (123456789)
87726	UnitedHealthcare		30	No	Yes	OKCODEG		Group NPI Number (1234567890)	Group NPI Number (1234567890)	Practice Name (Dr. Nick's Walk-In Clinic)	Tax ID Number (123456789)

7. When we search for the same payer from previously, we can see how the desired payer appears at the top of the list.

Important Demographics Insurances Eligibility Authorizations Smoking Status Flags Balance onpatient Payments

Sufficient patient demographics to bill insurance.

Primary Ins Secondary Ins Tertiary Ins Auto Accident Worker's Comp Durable Med Eqpt

Primary Insurance Save to Insurance History Patient Insurance History

Subscriber is the Patient  Insured person is the same person as the Patient

Insurance Company aetna

Carrier Payer ID 60054: Aetna  
PO Box 981106, El Paso, TX 79998

TPC Code PRNT1882: Aetna  
Aetna P.O. Box 13441, Pensacola, FL 32591

Insurance ID Number PRNT1814: Aetna  
Aetna P.O. Box 14079, Lexington, KY 40512-4079

Insurance group name 60054: Aetna KY  
P.O. Box 14079, Lexington, KY 40512-4079

Insurance group number PRNT1814: Aetna PPO  
AETNA PPO p.o box 981106, El paso, TX 79998

Insurance plan name 13383: Orthomet - Aetna  
Claims M.D.P.O BOX 1177, PECOS, NM 87552

Insurance plan type 26337: Aetna - IL Medicaid  
PO BOX 66545 - Phoenix, AR 85082

Insurance claim office number 34734: Aetna Better Health Inc.  
38992: Aetna TX Medicaid & CHIP  
P.O. Box 569150, Dallas, TX 75356-9150

Number visits allowed per year 50023: Aetna Better Health of Ohio  
128KS: Aetna Better Health of Kansas  
4241N: Aetna Better Health of Maryland

Primary Insurance Notes

Important Demographics Insurances Eligibility Authorizations Smoking Status Flags Balance onpatient Payments

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Primary Ins Secondary Ins Tertiary Ins Auto Accident Worker's Comp Durable Med Eqpt

Primary Insurance Save to Insurance History Patient Insurance History

Subscriber is the Patient  Insured person is the same person as the Patient

Insurance Company aetna

Carrier Payer ID 46320: NJ Aetna Better Health of New Jersey  
Claims address:PO. Box 61925 Phoenix, AZ. 85082-1925

TPC Code GPRNT1814: KY Aetna  
Aetna P.O. Box 13441, Pensacola, FL 32591

Insurance ID Number GPRNT1814: KY Aetna  
Aetna P.O. Box 14079, Lexington, KY 40512-4079

Insurance group name GPRNT1814: Aetna PPO  
AETNA PPO p.o box 981106, El paso, TX 79998

Insurance plan name 13383: Orthomet - Aetna  
Located in White Plains, New York

Insurance plan type 60054: Aetna Health Plans  
PO Box 14079, Lexington, KY 40512-4079

Insurance claim office number 34734: Aetna Better Health of Ohio  
38992: TX Aetna Texas Medicaid & CHIP  
50023: OH Aetna Better Health of Ohio  
Claims address: PO Box 64205, Phoenix, AZ 85082

Number visits allowed per year 38992: TX Aetna Texas Medicaid & CHIP

Card issued date 50023: OH Aetna Better Health of Ohio  
Claims address: PO Box 64205, Phoenix, AZ 85082

Primary Insurance Notes  
JLWH- JWH: Aetna U.S. Healthcare  
Located in Allen Park, Michigan  
128FL: Aetna Better Health of FL  
P.O. Box 63578, PHOENIX, AZ 85082-1925