



# Point of Sale Office Hours

Creating a New Insurance Entry in the Insurer File

James Bower, PharmD, LCDR, USPHS

February 13, 2024



## Learning Objectives

- Understand how to enter Rx insurance information into the Insurer file so it can be entered on a patient's profile
- Understand how to add an insurer as a new ABSP insurer after it has been entered into the Insurer file



## Scenario

You are working in the pharmacy, and you identify Rx insurance coverage for a patient on CardFinder.

You review the SUMI report and cannot find an insurance entry with the Rx BIN and PCN that matches the info returned from CardFinder.

Now you are stuck and cannot enter the insurance on the patient's file until somebody enters the insurance in the Insurer file...but you don't have to be!



## Why Do We Need to Know This?

- This is typically a business office function in many sites; however, pharmacy can do this, and in my opinion, should do this.
- If an insurer is not in the Insurer file, it will not be on the SUMI report, and, therefore, is not entered in the system and cannot be put on a patient's file and cannot be billed.
- By knowing how to do this, **you** can immediately make the entry in the Insurer file, add the insurer as a new ABSP insurer, enter the insurance on a patient's file, and begin billing!



## Benefits

- Decreases the amount of time it takes for the insurer to get entered
  - Allows for immediate billing of claims
- Decreases the chance that the claims will be forgotten and not billed
  - The longer it takes for the insurance to be entered in the Insurer file, the more likely the claims may be forgotten
- Ensures that the insurance is entered correctly and in a manner that easy for the pharmacy to identify
- Decreases business office workload



## Needed Security Keys

- ABMZMENU: Allows access to the Third-Party Billing system
- ABMDZ TABLE MAINTENANCE: Allows access to the Third-Party **Table Maintenance** menu
- ABMD TM INS MENU: Allows access to the **Insurer File Menu**



## How to Make an Insurance Entry in the Insurer File

- Go to **Add/Edit Insurer**
  - **Third Party Billing System (3PB) > Table Maintenance Menu (TMTP) > Insurer File Menu (INTM) > Add/Edit Insurer (EDIN)**
  - Or **^EDIN**
- Select **Add New Insurer**
  - Enter the name of the new insurer
  - If the new insurance you are entering has the exact same name as one that already exists in the Insurer file, it will not allow you to make an entry
- The only fields that need an entry are the following:
  - **Street, City, State, Insurer Status, Type of Insurer, and Rx Billing Status**
  - Recommended: **Phone Number**



# Demonstration



# How to Make an Insurance Entry in the Insurer File (1)

- **Insurer Status options**

- **Billable**

- Allows the insurance to be billed—what you want to select

- **Unselectable**

- This option allows the insurance to be unselectable on a patient's profile
- If an insurance is not longer active, or if you make an entry in error, then you want to select this option

- **Unbillable**

- Can't bill the insurance

```
Insurer Status.....: BILLABLE// ??
```

```
Choose from:
```

```
0 UNSELECTABLE
```

```
1 BILLABLE
```

```
4 UNBILLABLE
```

```
Insurer Status.....: BILLABLE// █
```



## How to Make an Insurance Entry in the Insurer File (2)

- **Type of Insurer**

- There are many
- The most common are
  - Private
  - Medicare Part D
  - Medicaid
- Make the appropriate selection for your entry

```
Choose from:
3P LIABILITY          T
CHAMPUS              C
CHIP (KIDSCARE)      K
FPL 133 PERCENT      FPL
FRATERNAL ORG        F
GUARANTOR            G
HMO                  H
INDIAN PATIENT        I
MCR MANAGED CARE     MMC
MCR PART C           MC
MCR PART D           MD
MEDICAID FI          D
MEDICARE FI          R
MEDICARE HMO         MH
MEDICARE SUPPL       M
NON-BEN (NON-INDIAN) N
PRIVATE              P
STATE EXCHANGE PLAN  SEP
TRIBAL SELF INSURED  TSI
VETERANS ADMINISTRATION U
WORKMEN'S COMP       W
```



## How to Make an Insurance Entry in the Insurer File (3)

- **Rx Billing Status**

- **Billed Point Of Sale**

- Does exactly as it says, causes the insurance to billed at point of sale. Select this one.

- **Outpatient Drugs Only**

- I am not entirely sure what this does.

- **Unbillable**

- Choose if the insurance is no longer in use or you made an entry in error.

```
Choose from:  
U      UNBILLABLE  
O      OUTPATIENT DRUGS ONLY  
P      BILLED POINT OF SALE  
Rx Billing Status.: BILLED POINT OF SALE// █
```



## How to Add a New ABSP Insurer

- Once the insurance is entered in the Insurer file, it still needs to be added as a new ABSP insurer to make it selectable on page 4 of a patient's file (i.e., to add it to the patient's file)
- Go to **Advanced Setup of Insurer**
  - **Pharmacy Point of Sale (ABSP) > Pharmacy Point of Sale Manager Menu (SET) > Pharmacy Point of Sale Setup Menu (SET) > Edit Pharmacy POS Insurance Settings (INS) > Advanced Setup of Insurer (ADV)**
  - Or **^ADV**



# How to Add a New ABSP Insurer: Demonstration

```
*****  
* PHARMACY POINT OF SALE V1.0 P52 *  
* WINNEBAGO TRIBAL HLTH PROGRAM *  
* Advanced setup of insurer *  
*****  
  
Select ABSP INSURER NAME: RX-123456Narrative contained no useable words.  
Search was unsuccessful.  
  
Since the KEYWORD LOOKUP failed lets try a NON-KEYWORD LOOKUP...  
  
RX-123456Narrative contained no useable words.  
Search was unsuccessful.  
  
Since the KEYWORD LOOKUP failed lets try a NON-KEYWORD LOOKUP...  
  
RX-123456-DEMO      NEBRASKA      68071  
...OK? Yes// (Yes)  
  
Are you adding 'RX-123456-DEMO' as a new ABSP INSURER (the 236TH)? No// Y
```



## How to Add a New ABSP Insurer (1)

- Enter the insurer you just added to the Insurer file at the “ABSP Insurer Name” prompt
- Make entries in the following fields: **NCPDP Version**, **BIN Number**, **PCN Number**, **RX – Help Telephone #**, **Medicare PartD**
- Use defaults in the following fields: **Maximum RX's Per Claim**, **Add Disp. Fee to Ingr. Cost**, **\*Contract Required**, **Total exclusive of Patient Amt**

```
.....
* PHARMACY POINT OF SALE V1.0 P52 *
* WINNEBAGO TRIBAL HLTH PROGRAM *
* Advanced setup of insurer *
.....

Select ABSP INSURER NAME: RX-123456Narrative contained no useable words.
Search was unsuccessful.

Since the KEYWORD LOOKUP failed lets try a NON-KEYWORD LOOKUP...

    RX-123456Narrative contained no useable words.
Search was unsuccessful.

Since the KEYWORD LOOKUP failed lets try a NON-KEYWORD LOOKUP...

    RX-123456-DEMO    NEBRASKA    58871
    ..OK? Yes//    (Yes)

Are you adding 'RX-123456-DEMO' as a new ABSP INSURER (the 236TH)? No// Y
```

```
NAME: RX-123456-DEMO//
NCPDP VERSION: D.0 D.0
BIN NUMBER: 123456
PCN NUMBER: DEMO
RX - Dispensing Fee:
GRACE PERIOD:
RX - Help Telephone #: 1-234-567-8910
MEDICARE PARTD?: N//
Maximum RX's Per Claim: 4//
Add Disp. Fee to Ingr. Cost: NO//
*Contract Required: NO//
Total exclusive of Patient Amt: N//
Select NCPDP FIELD SPECIAL CODE: 455//
```



## How to Add a New ABSP Insurer (Activate an Insurer)

- Once you reach the “NCPDP Field Special Code” prompt, you can type a caret (^) to exit.
- NCPDP field special codes are addressed in another Office Hours presentation.

```
NAME: RX-123456-DEMO//  
NCPDP VERSION: D.0 D.0  
BIN NUMBER: 123456  
PCN NUMBER: DEMO  
RX - Dispensing Fee:  
GRACE PERIOD:  
RX - Help Telephone #: 1-234-567-8910  
MEDICARE PARTD?: N//  
Maximum RX's Per Claim: 4//  
Add Disp. Fee to Ingr. Cost: NO//  
*Contract Required: NO//  
Total exclusive of Patient Amt: N//  
Select NCPDP FIELD SPECIAL CODE: 455//
```



## Reference Slides



# How to Make Insurance Entry in Insurer File (1)

```
+++++
|      THIRD PARTY BILLING SYSTEM - UER 2.6p34      |
+      Insurer File Menu                          +
|      WINNEBAGO TRIBAL HLTH PROGRAM                |
+++++
User: BOWER,JAMES PHARM D                          6-APR-2022 12:19 PM

EDIN  Add/Edit Insurer
RPIN  Replacement Text for Insurer Lookups
LSIN  Insurer Listing
IQIN  Display Insurer Info (Inquire)
SUIN  Claim Split Setup Report
SPIN  Claims ID'd as Potential Split Billing Report

You have PENDING ALERTS
      Enter *UA to jump to VIEW ALERTS option

You've got PRIORITY mail!

Select Insurer File Menu Option: EDIN
```



## How to Make Insurance Entry in Insurer File (2)

```
+-----+
|          THIRD PARTY BILLING SYSTEM - UER 2.6p34          |
+-----+
|          Add/Edit Insurer                               +-----+
|          WINNEBAGO TRIBAL HLTH PROGRAM                   |
+-----+
User: BOWER, JAMES PHARM D                                6-APR-2022 12:21 PM

WARNING: Before ADDING a new INSURER you should ensure that it
         does not already exist!

Select one of the following:

1          EDIT EXISTING INSURER
2          ADD NEW INSURER

Select DESIRED ACTION: 1// 2
```



## How to Make Insurance Entry in Insurer File (3)

```
Select DESIRED ACTION: 1// 2  ADD NEW INSURER

Enter the NAME of the INSURER: RX-610593-PHPCC

Do you want to Add 'RX-610593-PHPCC' as a New INSURER? YES
OK, adding...

<----- MAILING ADDRESS ----->
Street...: N/A
City....: N/A
State....: NE
   1  NEBRASKA      NE
   2  NETHERLANDS  NL
   3  NEVADA        NU
   4  NEW BRUNSWICK NB   INACTIVE
   5  NEW HAMPSHIRE NH
Press <RETURN> to see more, '^' to exit this list, OR
CHOOSE 1-5: 1  NEBRASKA  NE
Zip Code.: 68071

<----- BILLING ADDRESS ----->
      (if Different than Mailing Address)
Billing Office.: █
```



## How to Make Insurance Entry in Insurer File (4)

```
Phone Number.....: 18??  
ANSWER MUST BE 8-13 CHARACTERS IN LENGTH  
ANSWER MUST BE IN FORMAT: XXX-XXXX OR (XXX)XXX-XXXX  
  
Phone Number.....: (800)880-1188  
Contact Person.....:  
Federal Tax ID#....:  
AO Control Number..:  
Insurer Status.....: BILLABLE//  
Type of Insurer....: PRIVATE      P  
All Inclusive Mode.:  
Backbill Limit (months):  
Dental Bill Status.:  
Rx Billing Status..: BIL  BILLED POINT OF SALE  
  
Select CLINIC UNBILLABLE: █
```



## How to Make Insurance Entry in Insurer File (5)

```
Select CLINIC UNBILLABLE:  
  
EMC SUBMITTER ID:  
EMC PASSWORD:  
EMC TEST INDICATOR:  
USE PLAN NAME?:  
72 HOUR RULE:  
NPI USAGE:  
TRIBAL SELF-INSURED?:  
ICD-10 EFFECTIVE DATE: OCT 1,2015//  
DECIMAL IN 1500 BOX 21 (DX):  
  
GROUP NUMBER:  
  
PROVIDER PIN#  
  
Select PROVIDER: █
```



## How to Make Insurance Entry in Insurer File (6)

```
Visit          Mode of      Mult Fee      ----- Flat Rate -----  
Type - Description      Export      Form Sched  Start      Stop      Rate  
-----  
Select VISIT TYPE...: |
```



## Adding a New ABSP Insurer (1)

```
*****
* PHARMACY POINT OF SALE V1.0 P52 *
* WINNEBAGO TRIBAL HLTH PROGRAM *
* Advanced setup of insurer *
*****

Select ABSP INSURER NAME: RX-123456Narrative contained no useable words.
Search was unsuccessful.

Since the KEYWORD LOOKUP failed lets try a NON-KEYWORD LOOKUP...

    RX-123456Narrative contained no useable words.
Search was unsuccessful.

Since the KEYWORD LOOKUP failed lets try a NON-KEYWORD LOOKUP...

    RX-123456-DEMO    NEBRASKA    68871
    ...OK? Yes//    (Yes)

Are you adding 'RX-123456-DEMO' as a new ABSP INSURER (the 236TH)? No// Y
```



## Adding a New ABSP Insurer (2)

```
NAME: RX-123456-DEMO//  
NCPDP VERSION: D.0 D.0  
BIN NUMBER: 123456  
PCN NUMBER: DEMO  
RX - Dispensing Fee:  
GRACE PERIOD:  
RX - Help Telephone #: 1-234-567-8910  
MEDICARE PARTD?: N//  
Maximum RX's Per Claim: 4//  
Add Disp. Fee to Ingr. Cost: NO//  
*Contract Required: NO//  
Total exclusive of Patient Amt: N//  
Select NCPDP FIELD SPECIAL CODE: 455//
```



What Questions Do You Have?