



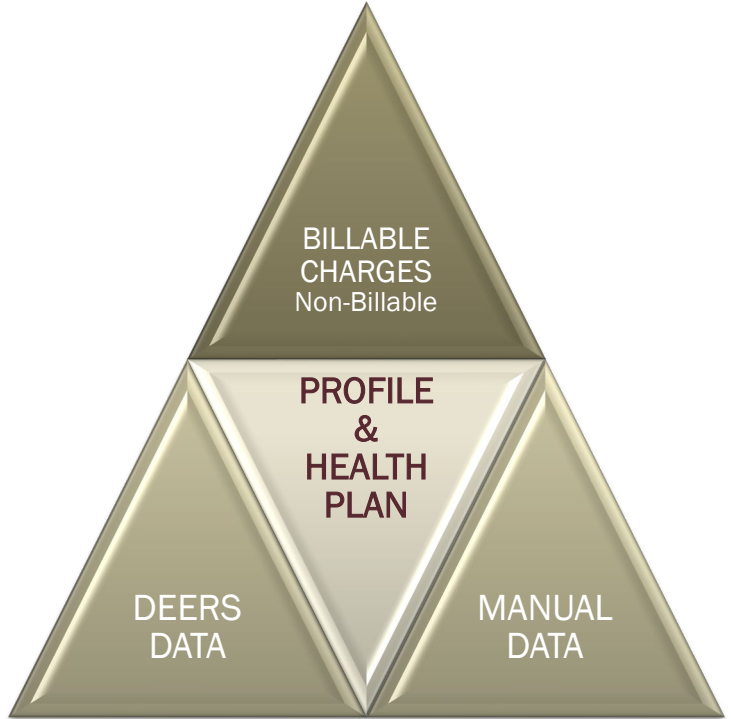
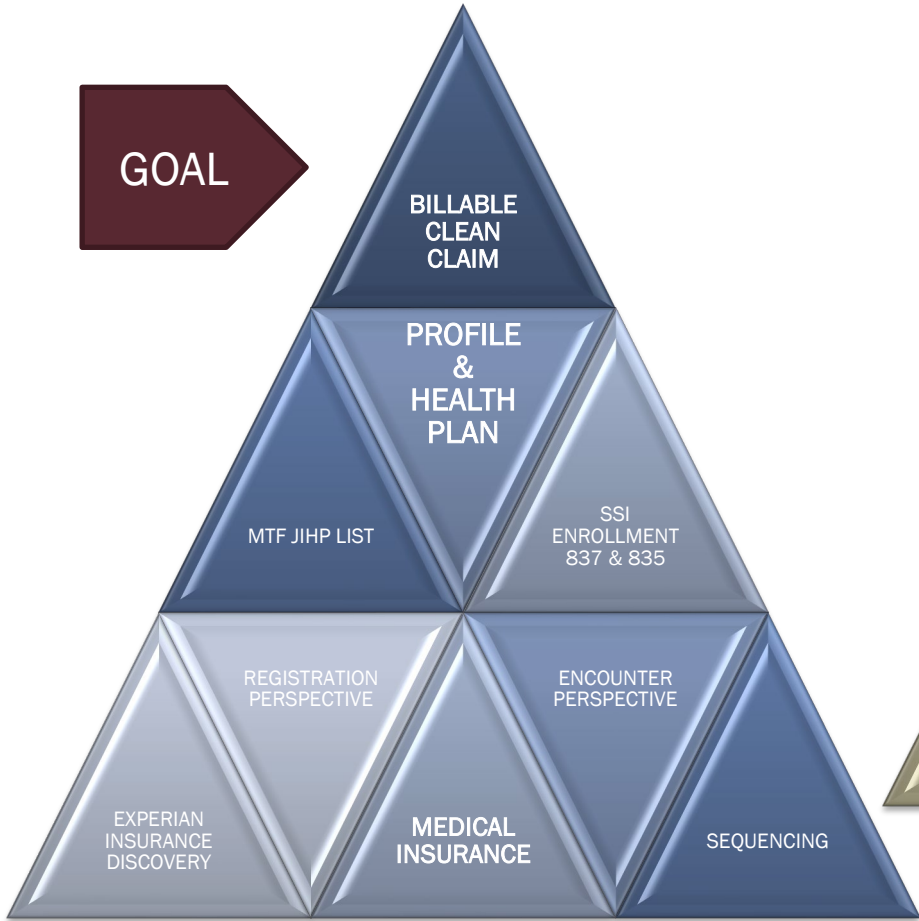
# **Health Plan Management Profiles – Health Plans – SSI 835/837**

Yvette Guerrero

May 2023

PROFILE AND HEALTH PLAN

GOAL



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# Profile & Health Plans



- Profile
  - Health Plan Header
  - 1 Profile ≥ 1 Health Plan
- Health Plan
  - Identify Specific Coverage
  - Identify Billing Category
- Financial Class
  - Identify Billing Category
- Profile & Health Plan
  - Auto-Populate DEERS/GIQD
  - Manual Create



# Profile & Health Plans ~ Adding Medical Insurance

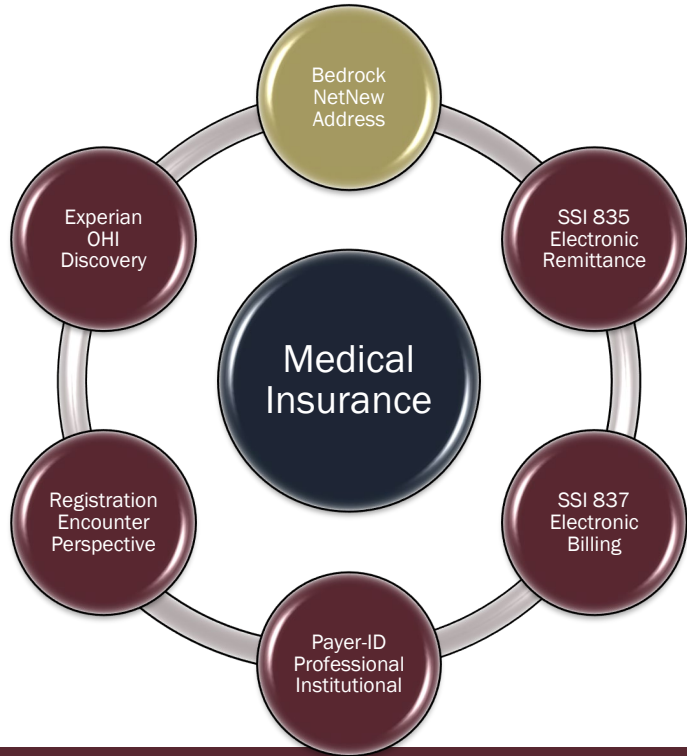


## Third Party Collections

- Tricare Profile and Health Plan
  - Medical Insurance is always 1<sup>st</sup>
- Public Medical Service Accounts
- Other Profile and Health Plan
  - Medical Insurance is always 2<sup>nd</sup>



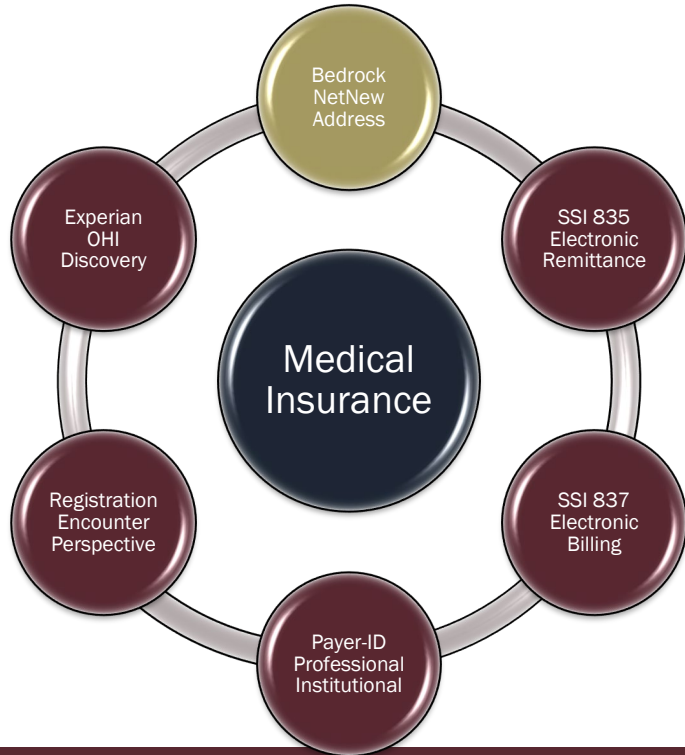
# Medical Insurance ~ Bedrock Data



- Medical Insurance
  - Bedrock is Master Table
    - ✓ Name of Insurance
    - ✓ Address ~ Phone Number
      - Multiple Addresses
    - ✓ Payer-ID
      - Professional x1
      - Institutional x1
    - ✓ MTF Production



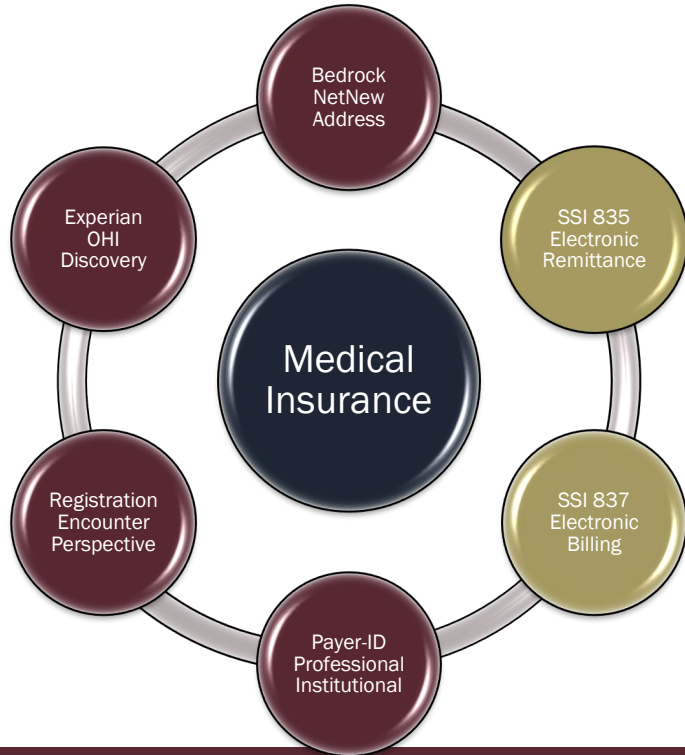
# Medical Insurance ~ Health Plan ~ Payer-ID



- Medical Insurance Health Plan
  - Verify Payer-ID is correct
  - Payer-ID Bedrock
    - Professional x1
    - Institutional x1
  - BC Washington Premera PPO
    - ✓ P- 99999-0094 ~ T-99999-0094
  - BC Washington Premera FEP
    - ✓ P- 99999-0299 ~ T-99999-0094



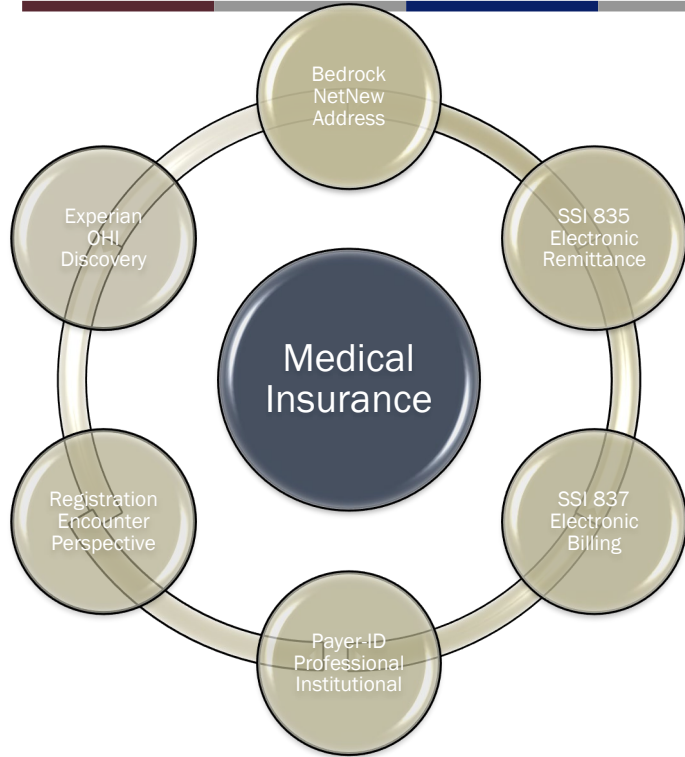
# Medical Insurance ~ SSI 835 ~ SSI 837



- SSI Provider Enrollment
  - 837 Electronic Billing
    - ✓ Set-up a Payer-ID for each
      - Professional (CMS1500)
      - Institutional (CMS1450/UB04)
    - ✓ Set-up for each billable NPI
  - 835 Electronic Remittance
    - ✓ Complete all SSI and insurance data request, monitor status
    - ✓ Set-up for Parent NPI only



# Medical Insurance Health Plan Summary



- Medical Insurance Health Plan
  - Verify Address and Payer-ID
  - SSI Provider Enrollment
    - ✓ Verify / Add 835 and 837
  - No Revenue Cycle Remittance
    - ✓ Verify / Add 835
  - SSI Billing or Remittance
    - ✓ Monitor for Payer-ID Errors





# Medical Insurance Management

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- Medical Insurance Management
  - Joint Insurance Health Plans (JIHP)
    - ✓ Shared Medical Insurance Health Plans with VA
  - SSI Clearinghouse ~ Provider Enrollment Portal
    - ✓ Maintain 837- Electronic Billing Payers
    - ✓ Maintain 835- Electronic Remittance Advice Payers
  - Experian Medical Insurance Discovery
    - ✓ Other Health Insurance Policies
  - Revenue Cycle ~ Registration and Encounter Perspectives
    - ✓ Maintain Medical Insurance Policies



# MEDICAL INSURANCE MANAGEMENT

Summary Overview {

- Outline Medical Insurance Management

SSI {

- Provider Enrollment
- Set-Up and Manage:
- 837- Electronic Billing
- 835- Remittance Advice

EXPERIAN {

- Medical Insurance Discovery
- Process New Insurance Policies
- Enter Billable Polices into RevenueCycle

Revenue Cycle {

- PERSPECTIVES
- Registration Perspective
- Encounters Perspective
- Add Medical Insurance

Revenue Cycle {

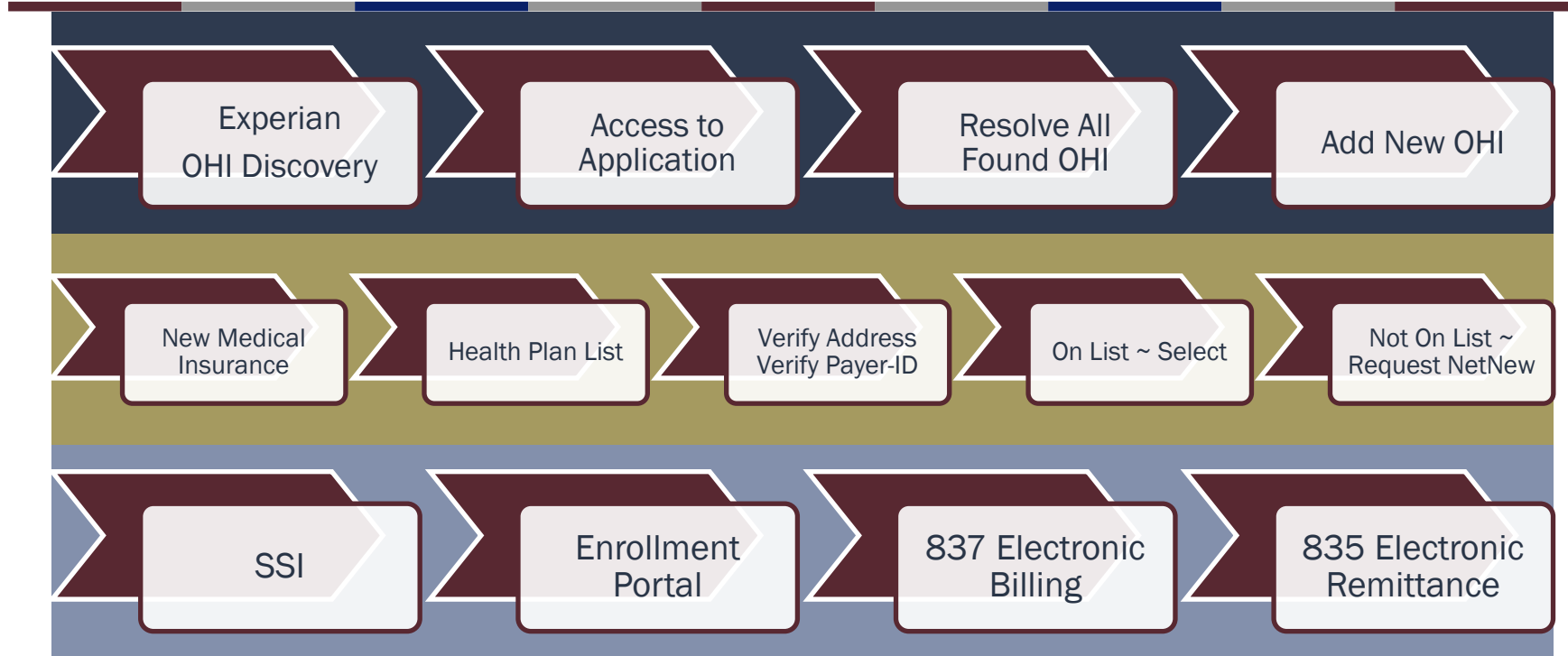
- WORKFLOW QUEUE
- Edit Failures Work Items
- Technical Denials Work Items



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# New Medical Insurance Health Plan



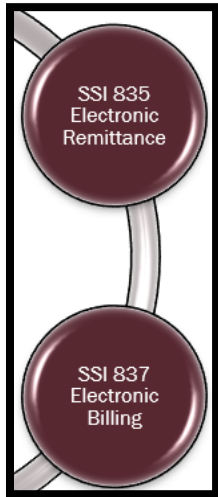
# List of Profiles & Health Plans



- Health Plan List ~ Profile List
  - Learning Center
  - UBO HelpFul HandOut B1b Profile & HEALTH PLAN REPORT 2023\_0330 excel.xlsx
    - ✓ All Profiles on List
    - ✓ All Health Plans on List
      - DEERS/GIQD
      - Medical Insurance
        - » Verify Name – Address – Payer-ID



# SSI Provider Enrollment



- SSI Enrollment Additional Information
  - Learning Center
  - DHA UBO Training SSI Enrollment 835\_837 04APRIL2023\_v1.pptx
  - UBO HelpFul HandOut D3a SSI ENROLLMENT 835-837\_Access Issues v2 2023\_0105 draft\_031523.docx



# External MPI Retrieve

- Always select 'Retain all Cerner values' ~ Select "Update"

The screenshot shows a web application window titled "External MPI Retrieve". The main content area is titled "External Sources & CERNER Comparison" and is divided into two columns: "External Sources" and "Cerner".

**External Sources**  
Retain all External values

**Identifiers**

DoD ID	[Redacted]	[Redacted]
SSN	[Redacted]	[Redacted]

**Names**

Last	[Redacted]	[Redacted]
First	[Redacted]	[Redacted]
Middle	[Redacted]	[Redacted]

**Other Demographic Details**

Gender	[Redacted]	[Redacted]
Birth Date	[Redacted]	[Redacted]

**Addresses and Phones**

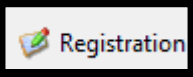
**Mailing Address**  (blank)  **Address Line 1:** [Redacted]  
**Address Line 2:** [Redacted]  
**Address Line 3:** [Redacted]  
**Address Line 4:** [Redacted]  
**City:** [Redacted]  
**State:** WA  
**County:** [Redacted]  
**Zip Code:** 982779294  
**Country:** US  
**Address Status:** [Redacted]  
**Begin Date:** 05/11/2023  
**End Date:** [Redacted]

At the bottom right of the window, there are two buttons: "Update" and "Not a Match".



# Incorrect Medical Insurance ~ HIC-ID Format

DOD OCC HEALTH NAF EMPLOYEE  
 FIRST HEALTH WA 91131 - MD (FIRWA0003)  
 HEALTHCARE MANAGEMENT ADMINISTRATORS HMA PPO  
 HEALTHNET HMO

Profile	Seq	Health Plan
▲ DOD-US MILITARY RETIRED  Registration	1	FIRST CHOICE HEALTH PPO
	2	TRICARE PRIME
	3	TRICARE FINAL BENEFIT

Profile	Seq	Health Plan
▲ DOD-US MILITARY RETIRED  Encounters	1	FIRST HEALTH WA 91131 - MD (FIRWA0003)
	2	TRICARE PRIME SPONSOR NAVY
	3	TRICARE FINAL BENEFIT

- Medical Insurance Health Plans
  - HIGH VOLUME Incorrect
    - ✓ CHCS/ABACUS HIC-ID Format
  - Update Registration Perspective
    - ✓ Example to left
  - Update Encounter Perspective
    - ✓ Encounter missed
    - ✓ Example to left
  - Denials and Rejects SSI



# Third Party Collections ~ Profile & Health Plan

- Profile of DOD-US Military “xx”
- Health Plan of Tricare “xx”
- Add Other Health Insurance (OHI) as Sequence 1

Profile <sup>▲</sup>	Seq	Health Plan	Payer	Financial Class
DOD-US MILITARY RETIRED				
	1	AETNA PPO	AETNA	COMMERCIAL/OHI
	2	TRICARE PLUS	TRICARE	TRICARE
	3	TRICARE FINAL BENEFIT	SELF PAY	Self Pay

PROFILE DEERS GENERATED  
 PATIENT FOUND IN DEERS

HEALTH PLAN  
 PATIENT IN DEERS / TRICARE ELIGIBLE  
 MANUAL ADD OHI





# Non-Health Care P&HP – Service Affiliates

- Service Affiliates
  - Retired DOD Civilian Employees
  - Only MWR Benefits
- Profile ‘Prefix’ logic removed
- Encounter Perspective
  - Incorrect P&HP linked

P&HP effective February 2022, increase in selection.

134 Self-Pay Billing Statements ~ Feb22-16Feb23

1,636 Self-Pay Billing Statements ~ 17Feb23 to 25Apr23

Profile	Seq	Health Plan	Payer	Financial Class
▲ DOD-NO DIRECT CARE BENEFITS				
	1	SERVICE AFFILIATES	SELF PAY	SERVICE AFFILIATES
	2	SERVICE AFFILIATES FINAL BENEFIT	SELF PAY	Self Pay
▲ DOD-US MILITARY RETIRED				
	1	TRICARE PLUS	TRICARE	Tricare
	2	TRICARE FINAL BENEFIT	SELF PAY	Self Pay



# Non-Health Care P&HP – Disabled American Veteran

Registration Perspective		Insurance Tab					
Demographics Tab							
Profile	Seq	Health Plan	Payer	Financial Class	Subscriber	Member Number	Group Number
DOD-NO DIRECT CARE BENEFITS							
	1	DISABLED AMERICAN VETERAN 000	SELF PAY	CIVILIAN EMERGENCY	LAST, FIRST	1234567	M000
	2	CIVILIAN EMERGENCY FINAL BENEFIT	SELF PAY	Self Pay	LAST, FIRST	1234567	
DOD-US MILITARY RETIRED FAMILY MBR							
	1	TRICARE PRIME FAMILY MBR	TRICARE	Tricare	LAST, FIRST	345678	315
	2	TRICARE FINAL BENEFIT	Self Pay	Self Pay	LAST, FIRST	345678	

- MPI DEERS Retrieve
  - Never select DISABLE AMERICAN VETERAN
  - Reason for visit is VA Authorized services
  - Add manual P&HP



# Health Plan List – UBO Tracking ~ Part 1

HIC-ID optional	BedRock NetNew	HEALTH PLAN Same as HP Health Plan Alias	STREET 1	Street 2	CITY	STATE	ZIP+4	MISC	PHONE	PLAN TYPE	COVERAGE TYPE	FINANCIAL CLASS	DHA SSI Institutional	DHA SSI Professional
AETTX0031		AETNA PPO	PO BOX 14079		LEXINGTON	KY	405124079		8886323862	OHI		Commercial/OHI	60054-NOCD	60054-NOCD
NEVER CHOOSE		DISABLED AMERICAN VETERAN 000 ***** NEVER CHOOSE *****											N/A	N/A
MANUAL ADD		DOD-VA SHARING AGREEMENT/LOCAL	VHA OFFICE OF FINANCE	PO BOX 30780	TAMPA	FL	336303780		8888888888	DOD/MILITARY		DOD-VA SHARING	12115-NOCD	12115-NOCD
GEHMN0001	NEW ADDRESS	GEHA UNITED HEALTH CARE OPTIONS PPO	PO BOX 30783		SALT LAKE CITY	UT	551210542		8888888888	OHI		Commercial/OHI	39026-NOCD	39026-NOCD
UBO MANUAL ADD		MAC CMAC								MAC		MAC	N/A	N/A
UNIGA0029		UNITED HEALTHCARE PPO	PO BOX 1600		KINGSTON	NY	124025555		8778423210	OHI		Commercial/OHI	87726-NOCD	87726-NOCD
UHCUT0002		UNITED HEALTHCARE SHARED SERVICES UHSS	PO BOX 30783		SALT LAKE CITY	UT	841300783		8778423210	OHI		Commercial/OHI	39026-NOCD	39026-NOCD



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# Health Plan List – UBO Tracking ~ Part 2

HEALTH PLAN Same as HP Health Plan Alias	SSI 837 Billing (Date Added)	SSI 835 RA Date Added Date Complete	SSI Claim Status HOSPITAL	CCV Processing	EDI 835 Manual RA
AETNA PPO	12/20/2022	Status 11 No Active Transactions	Payer Processing 11 Payer Rejected 5	Payer Processing 29	MANUAL RA
DISABLED AMERICAN VETERAN 000 ***** NEVER CHOOSE *****	N/A	N/A	N/A	N/A	N/A
DOD-VA SHARING AGREEMENT/LOCAL	1/17/2023	2/9/2023	NONE	NONE	NONE
GEHA UNITED HEALTH CARE OPTIONS PPO	1/10/2023	1/30/2023	Payer Processing 1	Payer Processing 1	NONE See UHC
MAC CMAC	N/A	N/A	N/A	N/A	N/A
UNITED HEALTHCARE PPO	1/10/2023	2/7/2023	Payer Processing 18	Payer Processing 10 Payer Rejected 5	EDI 835
UNITED HEALTHCARE SHARED SERVICES UHSS PPO	1/10/2023	2/7/2023	NONE	NONE	EDI 835



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# SSI Enrollment Portal - Reports

Name	Request ID	FTN	NPI	PTA#	Typ	Payer	Remot	Payer ID	Health Plan ID	Tra	Status Dat
DHA MEDICAL CENTER	1577611	540526857	1255380697		PHYS	ASAGEHA	00403	06603-NOCD	06603	837	1/10/2023
DHA MEDICAL CENTER	1577607	540526857	1255380697		HOSP	ASAGEHA	00403	06603-NOCD	06603	837	1/10/2023
DHA MEDICAL CENTER	1589546	540526857	1255380697		HOSP	VA FEE BASIS PROGRAMS	00896	12115-NOCD	12115	837	1/17/2023
DHA MEDICAL CENTER	1589540	540526857	1255380697		PHYS	VA FEE BASIS PROGRAMS	00896	12115-NOCD	12115	837	1/17/2023
DHA MEDICAL CENTER	1623880	540526857	1255380697		HOSP	VA FEE BASIS PROGRAMS	00622	12115-NOCD		835	2/7/2023
DHA MEDICAL CENTER	1623879	540526857	1255380697		PHYS	VA FEE BASIS PROGRAMS	00622	12115-NOCD		835	2/7/2023
DHA MEDICAL CENTER	1577632	540526857	1255380697		PHYS	UMR	00693	39026-NOCD	39026	837	1/10/2023
DHA MEDICAL CENTER	1577628	540526857	1255380697		HOSP	UMR	00693	39026-NOCD	39026	837	1/10/2023
DHA MEDICAL CENTER	1623669	540526857	1255380697		HOSP	UMR	00693	39026-NOCD	39026	835	1/30/2023
DHA MEDICAL CENTER	1623668	540526857	1255380697		PHYS	UMR	00693	39026-NOCD	39026	835	1/30/2023
DHA MEDICAL CENTER	1521263	540526857	1255380697		PHYS	AETNA	00565	60054-NOCD	60054	837	12/20/2022
DHA MEDICAL CENTER	1521257	540526857	1255380697		HOSP	AETNA	00565	60054-NOCD	60054	837	12/20/2022
DHA MEDICAL CENTER						AETNA	00565	60054-NOCD	STATUS 11	835	
DHA MEDICAL CENTER	1577673	540526857	1255380697		PHYS	UNITED HEALTHCARE	00693	87726-NOCD	87726	837	1/10/2023
DHA MEDICAL CENTER	1577670	540526857	1255380697		HOSP	UNITED HEALTHCARE	00693	87726-NOCD	87726	837	1/10/2023
DHA MEDICAL CENTER	1623843	540526857	1255380697		HOSP	UNITED HEALTHCARE	00693	87726-NOCD	87726	835	2/9/2023
DHA MEDICAL CENTER	1623842	540526857	1255380697		PHYS	UNITED HEALTHCARE	00693	87726-NOCD	87726	835	2/9/2023
DHA MEDICAL CENTER	1577691	540526857	1255380697		HOSP	NC BLUE CROSS BLUE SHIELD	00026	99999-0034	560894904	837	1/10/2023
DHA MEDICAL CENTER	1577687	540526857	1255380697		PHYS	NC BLUE CROSS BLUE SHIELD	00026	99999-0034	560894904	837	1/10/2023
						NC BLUE CROSS BLUE SHIELD	00026	99999-0034	STATUS 11	835	



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# SSI Billing Enterprise Report

Row Labels	Count of Package Number
[-] HOSP	
[-] AETNA PPO	
[-] 60054	
[-] Billed	
Payer Processing Claim	11
Payer Rejected Claim	5
[-] BCBS GEORGIA ANTHEM PPO	
[-] 99999	
[-] Billed	
Payer Accepted File	1
Payer Processing Claim	21
SSI CH Forwarded	1
[-] Error	
(blank)	1
[-] BCBS VIRGINIA ANTHEM PPO	
[-] 99999	
[-] Billed	
Payer Processing Claim	32
SSI CH Forwarded	1
[-] Error	
(blank)	4

[-] PHYS	
[-] AETNA INTERNATIONAL PPO	
[-] 60054	
[-] Billed	
Payer Rejected Claim	1
[-] Error	
(blank)	1
[-] AETNA PPO	
[-] 60054	
[-] Billed	
Payer Processing Claim	29
[-] Error	
(blank)	2
[-] BCBS GEORGIA ANTHEM PPO	
[-] 99999	
[-] Billed	
Payer Processing Claim	9
SSI CH Forwarded	1
[-] BCBS VIRGINIA ANTHEM PPO	
[-] 99999	
[-] Billed	
Payer Processing Claim	37
Payer Rejected Claim	3
SSI CH Forwarded	2
[-] Error	
(blank)	6



# Cash Collection Voucher Report

Row Labels	Sum of Amount
[-] EDI 835	
BLUE CROSS BLUE SHIELD GEORGIA	-54.73
BLUE CROSS BLUE SHIELD GEORGIA ANTHEM	-1135.18
BLUE CROSS BLUE SHIELD VIRGINIA ANTHEM	-1443.52
UNITED HEALTHCARE	-530.53
[-] Remittance Posting (Revenue Cycle)	
AETNA	-968.76
HUMANA	-151.73
<b>Grand Total</b>	<b>-4284.45</b>



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# Websites- DHA UBO Learning Center - SharePoint

- Revenue Cycle Documents
  - SOPs
  - Open Forum and Training PowerPoint Presentations
  - Go-Live Documents / RevenueCycle Processed

[LearningCenter \(health.mil\)](https://info.health.mil/bus/bm/ubo/SitePages/LearningCenter.aspx)

<https://info.health.mil/bus/bm/ubo/SitePages/LearningCenter.aspx>

Access Management

Learning Center

- Documents are updated often, review Modified date for updated documents.
  - Go-Live Documents are 'draft' version, this allows for updates to be added.
  - Helpdesk FAQs aka Open Forum documents are added here.





# Websites- DHA UBO Health Plan Request Email

- UBO Health Plan Email Request
  - Send all DHA UBO request to the email for updates or to add a Net New Insurance Health Plan in RevenueCycle
  - Monitored by DHA UBO Program Office

[dha.ncr.j-1-8.mbx.ubo-health-plan-requests@health.mil](mailto:dha.ncr.j-1-8.mbx.ubo-health-plan-requests@health.mil)

- Go-Live Documents
  - Steps and detailed format are in the document.



UBO HelpFul HandOut B1d P&HP INSURANCE REQUEST NETNEW



# DHA UBO Learning Center - SharePoint

Name
UBO HelpFul HandOut B1a Profile & HEALTH PLAN WORK ITEMS v1_2023_0321 draft.docx
UBO HelpFul HandOut B1b Profile & HEALTH PLAN REPORT 2023_0330 excel.xlsx
UBO HelpFul HandOut B1c P&HP WI INCORRECT BENEFITS_SELFPAY&REPORT 2023_0321 draft.docx
UBO HelpFul HandOut B1d P&HP INSURANCE REQUEST NETNEW_UPDATE_2023-0327 draft.docx
UBO HelpFul HandOut B3 Experian Insurance Discovery 2023_0120.docx
UBO HelpFul HandOut B4 P&HP WORK ITEM C-BENEFITS_SELFPAY_REPORT 2023_0321 draft.docx
UBO HelpFul HandOut D Medical Insurance Management v1_2023_0109 WHERE TO START updated.docx
UBO HelpFul HandOut D3a SSI ENROLLMENT 835-837_Access Issues v2 2023_0105 draft_031523.docx
UBO HelpFul HandOut D4a SSI 835 Status Report v1 2022_1221 EXCEL DRAFT.xlsx
UBO HelpFul HandOut D4c SSI JIHP HIC-ID List v3 2023_0201 EXCEL DRAFT.xlsx
UBO HelpFul HandOut D5 Billing Veteran Administration v1 2023_0117 DRAFT.docx
UBO HelpFul HandOut E3b MAC BILLING 2023_0410 draft.docx



# QUESTIONS



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  - After completion of both live broadcasts and after attendance records have been verified, a Certificate of Approval including an AAPC Index Number will be sent via e-mail to participants who logged in or e-mailed as required. This may take several business days.
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  - View the entire archived webinar (free and available on demand at <https://health.mil/Military-Health-Topics/Access-Cost-Quality-and-Safety/Uniform-Business-Office/UBO-Learning-Center/Archived-Webinars>)
  - Complete a post-test available *within* the archived webinar
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