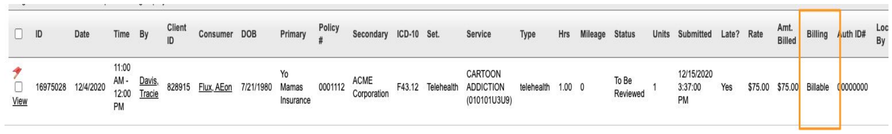
Billing to Secondary Payer

ShareNote Documentation 12/15/2020

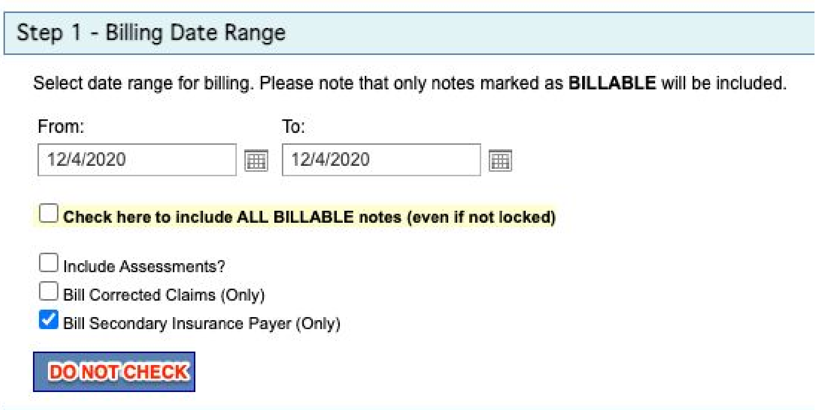
When billing to secondary you will:

1. Search your Note Center for the notes you are needing to bill to the secondary payer.
    - Mark the notes to “Billable” as you normally would.

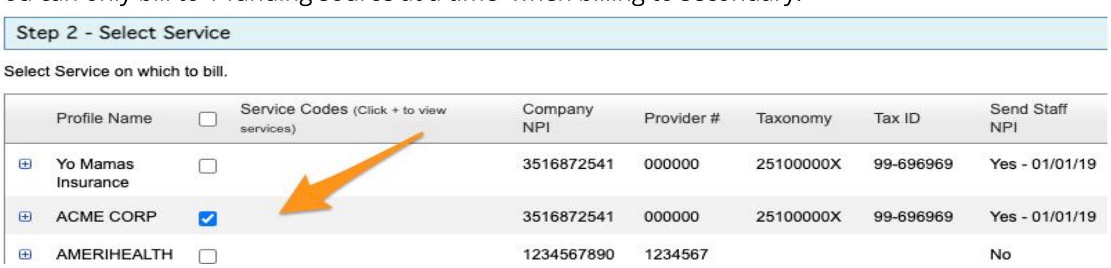


	ID	Date	Time	By	Client ID	Consumer	DOB	Primary	Policy #	Secondary	ICD-10	Set.	Service	Type	Hrs	Mileage	Status	Units	Submitted	Late?	Rate	Amt. Billed	Billing	Auth ID#	Loc By
View	16975028	12/4/2020	11:00 AM - 12:00 PM	Davis, Tracie	828915	Flux, AEon	7/21/1980	Yo Mamas Insurance	0001112	ACME Corporation	F43.12	Telehealth	CARTOON ADDICTION (010101U3U9)	telehealth	1.00	0	To Be Reviewed	1	12/15/2020 3:37:00 PM	Yes	$75.00	$75.00	Billable	00000000	

2.Now let's go to Managers> Direct Billing> New Billing Submission
    - You will input the date range for the notes you are wanting to bill
    - If the notes have not been locked you will check the checkbox to include all billable notes even if not locked
    - Check the checkbox to bill to Secondary
    - ***DO NOT CHECK SERVICES***



3.You will **manually** check the insurance billing profile the note(s) need to bill through. *Please note you can only bill to 1 funding source at a time when billing to secondary.



Step 2 - Select Service

Select Service on which to bill.

Profile Name		Service Codes (Click + to view services)	Company NPI	Provider #	Taxonomy	Tax ID	Send Staff NPI
Yo Mamas Insurance	☐		3516872541	000000	25100000X	99-696969	Yes - 01/01/19
ACME CORP	☑		3516872541	000000	25100000X	99-696969	Yes - 01/01/19
AMERIHEALTH	☐		1234567890	1234567			No

4.Validate Data -

Step 3 - Data Validation

Check clients and staff to ensure there are no missing required data fields (checks based on selected criteria)

Validate Data

All client information is present.

Service	First	Last	Address	City	State	Zip	DOB	Prim. Dx	Policy #
No records to display.									

All staff information is present.

First	Last	Licensure
No records to display.		

All required professional staff (therapists) billing profiles are present.

First	Last	Licensure	Rendering Staff NPI
No records to display.			

All billing profiles are within the effective date range.

Profile Name	Start Date	End Date
No records to display.		

5.Add to Production Billing Queue

Billing Queue Settings

- ○ Testing/Report Only
- ◉ Production BILL

☑ Check here to receive email alert when billing is complete (email address must be in profile)

Click here if you just want to run a report and NOT send to billing queue

Add to Production Billing Queue