



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

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March 2024

# AGENDA- Profile and Health Plan

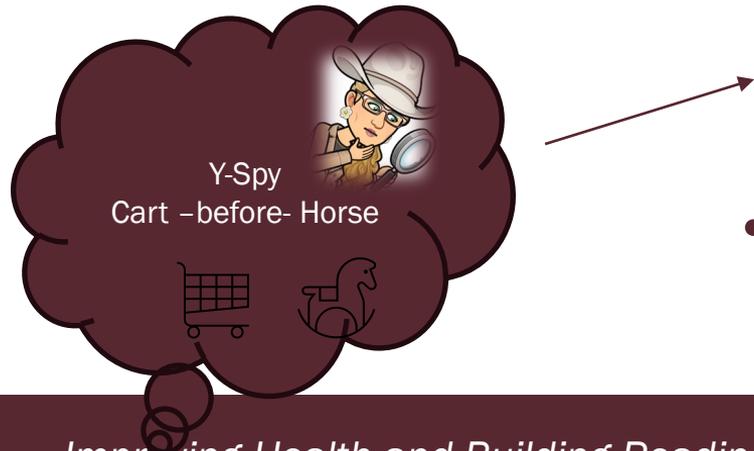
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- The March 2024 DHA UBO Webinar topic is “Profile and Health Plans”.
- The webinar for Profile and Health Plans is for Uniform Business Office staff, front desk staff – registration staff – others. A team pro-active approach is needed to avoid work items (errors) occurring. This will result in a reduction of encounters in the DNFB.
- The webinar is a high-level review of the process and logic.



# BLUF- Profile and Health Plan

- Revenue Cycle starts with the Profile & Health Plan associated with the encounter. The correct selection defines how smoothly the encounter will progress.
- The presentation references an updated UBO HelpFul HandOut (4ab) Profile & Health Plans. The document is in the Learning Center, it is still ‘In-Progress’, with all the changes an in-progress version is what is available.\*1
- Please monitor for updates, especially if I made a mistake.



Uploaded before 3/29



# MPI RETRIEVE

- A DEERS retrieve is required by regulation. When 'Not A Match' is selected a user is bypassing this requirement. The 'Retain all Cerner Values' does not prevent the update of DEERS data.



## MPI DO

- Let MPI Retrieve Complete
- Select Retain all Cerner Values
- Select  DEERS if Current Data
- Select Update

## MPI DO NOT

- Close MPI Retrieve
- Forget to Review
- Select Not a Match
  - Unless it is, then report

## Not Following Steps

- Create Self-Pay Only Work Item
- Create Incorrect Coordination of Benefit Work Item
- Patient Data is not current



# MPI Retrieve slide 2

- Recently verified with Oracle Registration in March 2024.
- The MPI retrieve is the first step to sync patient data, when this is done incorrectly errors may occur including work items.
- Most/many ‘Self-Pay ‘WI’ and ‘Incorrect Coordination of Benefits ‘WI’ would not occur if the MPI retrieve was done properly.



Y-SPY  
Connie-the-Contractor got married to Major-Military and now has Tricare Prime.  
Wow- She received a statement in the mail.  
Someone selected Not-A-Match.



# MPI Retrieve slide 3

- When 'Not a Match' is selected, the user is "negating" the match with DEERS; resulting in the interface reporting this is not the correct patient. DEERS will not update MHS Genesis if 'Not a Match' is selected, this may not cause a large discrepancy with patient information, but any updated information will not be uploaded.
- "Retain All Cerner Values" is usually the best approach. However, there could be instances where a patient might have updated their address in DEERS prior to presenting for an appointment, the DEERS address would be retained. Ultimately, the users should verify with the patient the most up-to-date values are selected.
- If the retrieve is not a match, provide the information to local point of contact to resolve the incorrect GIQD/DEERS interface.
- Selecting 'Retain All Cerner Values' the interface will upload the current DEERS Profile & Health Plan data.



# MPI Retrieve slide 4

## MPI Retrieve – No Updates #1

Example #1 is a straightforward External MPI Retrieve.

1. Review the data for any unmatched sections.
2. Select 'Retain all Cerner values' under Cerner.
3. Select Update.

External Sources && CERNER Comparison

External Sources [Retain all External values](#)

Cerner [Retain all Cerner values](#)

**Identifiers**

DoD ID [Redacted]

SSN [Redacted]

**Names**

Last [Redacted]

First [Redacted]

Middle [Redacted]

**Other Demographic Details**

Gender [Redacted]

Birth Date [Redacted]

Deceased [Redacted]

Work Phone [Redacted]

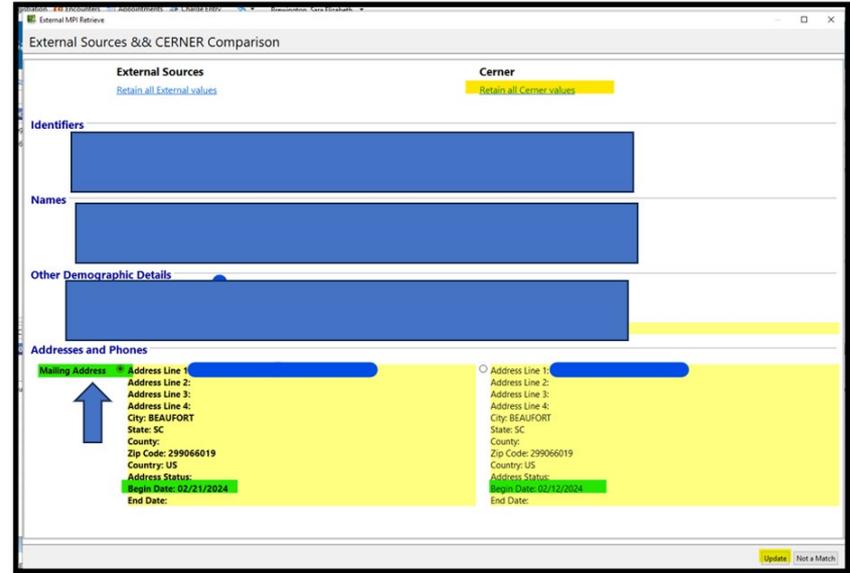
Update Not a Match



# MPI Retrieve slide 5

## External Source Current Data #2

1. Review the data for any unmatched sections.
  - Notify MTF POC potential unmatched patients.
  - Other Demographics, External Sources has current address.
2. Select 'Retain all Cerner values' under Cerner.
3. Select 'Mailing Address'  under External Sources.
  - Address has recent date.
4. Select Update.



# EMPI Refresh ~ Something New

## Refresh Patient Demographics

### Change Conversation

1. Registration Perspective select “Refresh Patient Demographics”.



- When to use:
- If there are duplicates and/or updates are not occurring. Remove the P&HP, then save and perform the EMPI Refresh.
- Recommend not to remove manual P&HP.
- Another Reason:
- Patient Insurance tab in Registration Perspective is blank, Encounter Perspective has “Insurance” Profile and a list of health plan.
- Perform the EMPI Refresh, then select the correct P&HP for the encounter.



# Incorrect Coordination of Benefits Work Item

## Self-Pay Only Work Item

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- ‘Incorrect Coordination of Benefits ‘WI’ and “Self-Pay Only Work Item” is under the PAD Work Group to resolve. UBO may update if an encounter requires an update to complete billing process, or P&HP data was received. Once the P&HP are corrected, the ‘WI’ will auto-resolve.
- The HelpFul HandOut document has several examples to assist in resolving these work items.



# Discern Revenue Cycle - Workqueue Report

- There is a high volume of encounters with 'Incorrect Coordination of Benefits' and 'Self-Pay Only'.
- There has been a lot of hard work to resolve these work items. Great JOB!

Y-Spy  
A report....



Row Labels	Count of FIN	Count of TOTAL_CHARGES	Sum of ENCOUNTER_BALANCE
Incorrect Coordination of Benefits 'WI'	22798		\$ 5,384,529.54
<b>Grand Total</b>	<b>22798</b>		<b>\$ 5,384,529.54</b>

The 'Self-Pay Only' is so large it did not run.



# Medical Insurance Management (OHI)

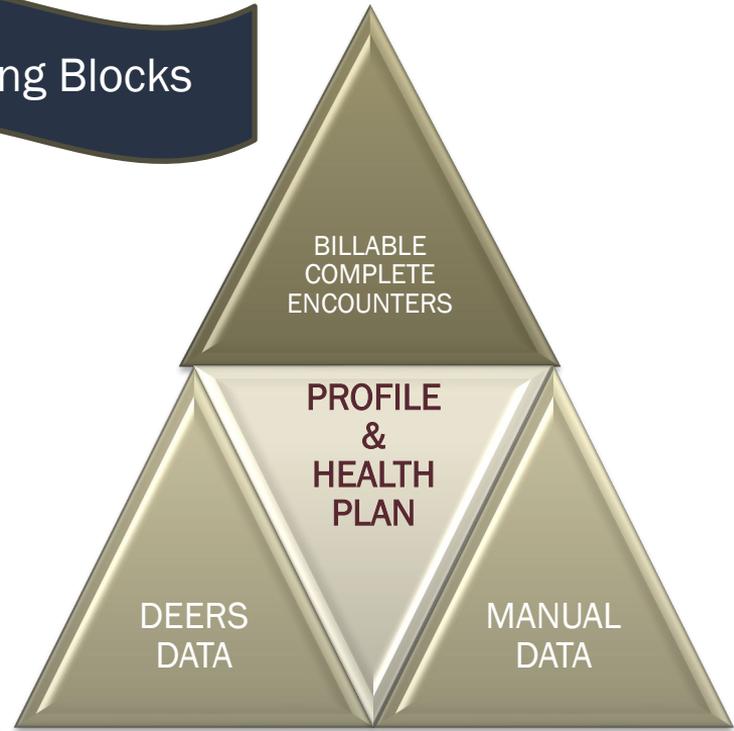
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- Medical Insurance Management
  - Insurance Health Plans
    - ✓ Shared Medical Insurance Health Plans with VA
  - SSI Clearinghouse ~ Provider Enrollment Portal
    - ✓ Maintain 837- Electronic Billing Payers
    - ✓ Maintain 835- Electronic Remittance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





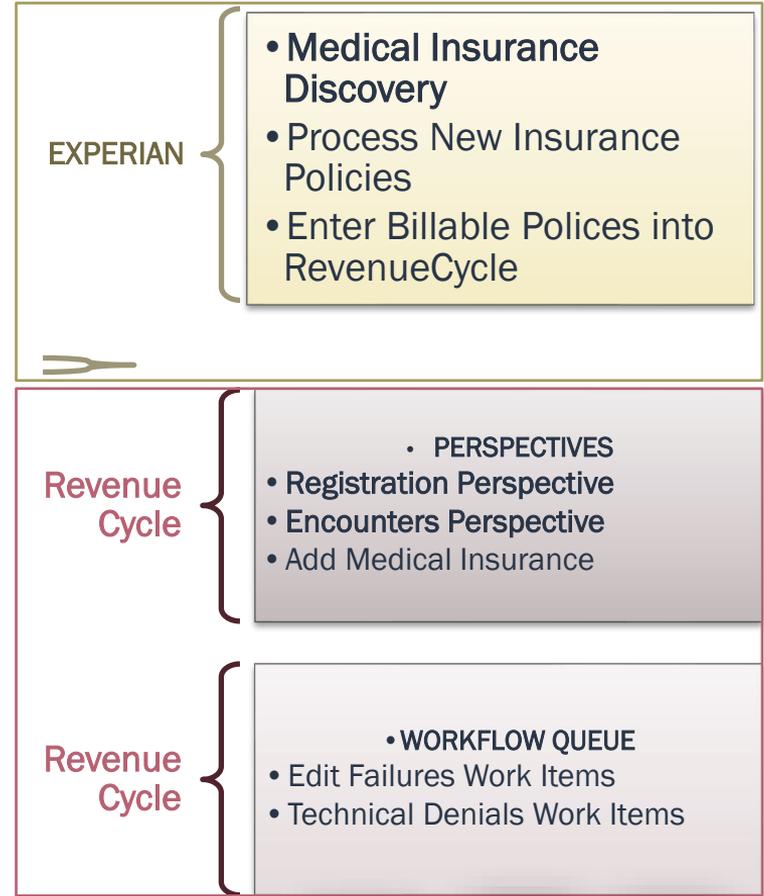
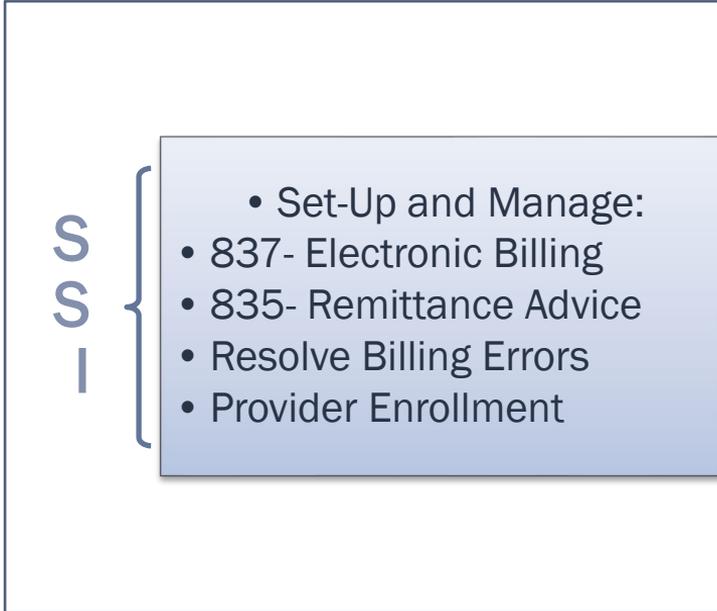
PROFILE AND HEALTH PLAN



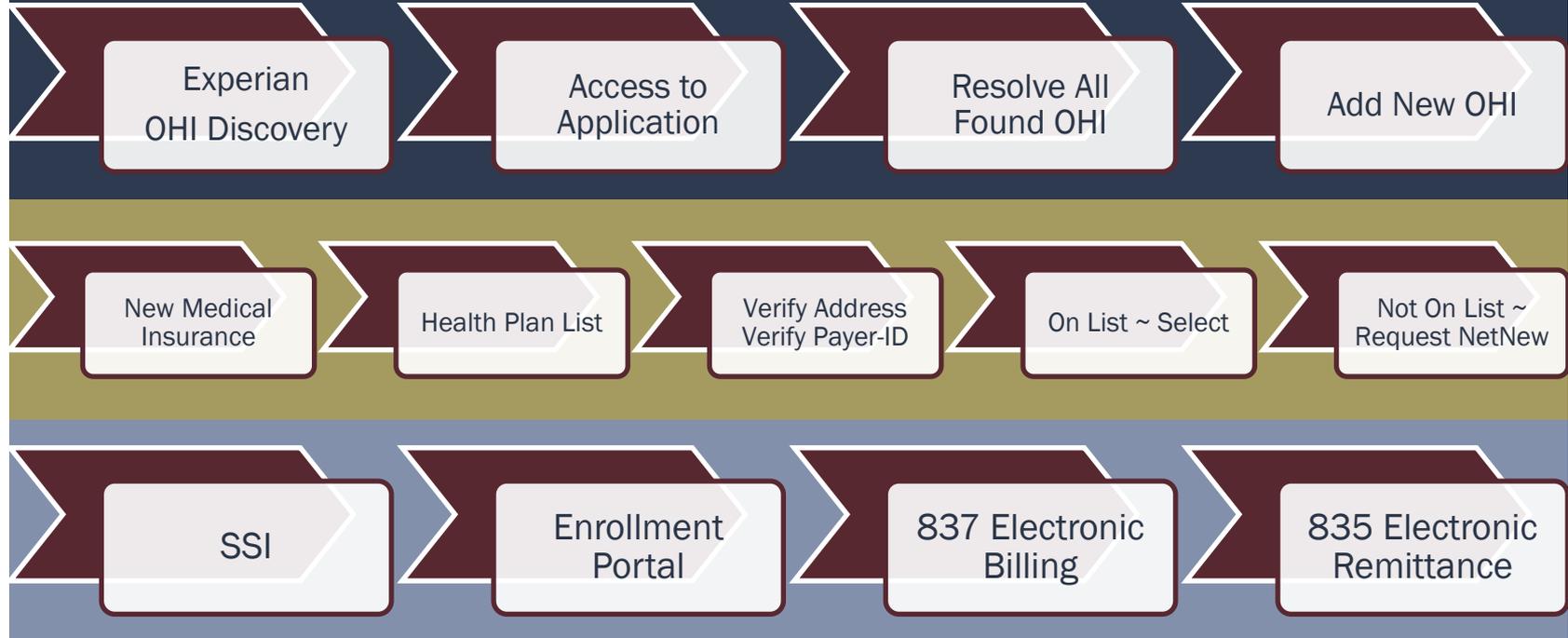
Improving Health and Building Readiness. Anytime, Anywhere - Always



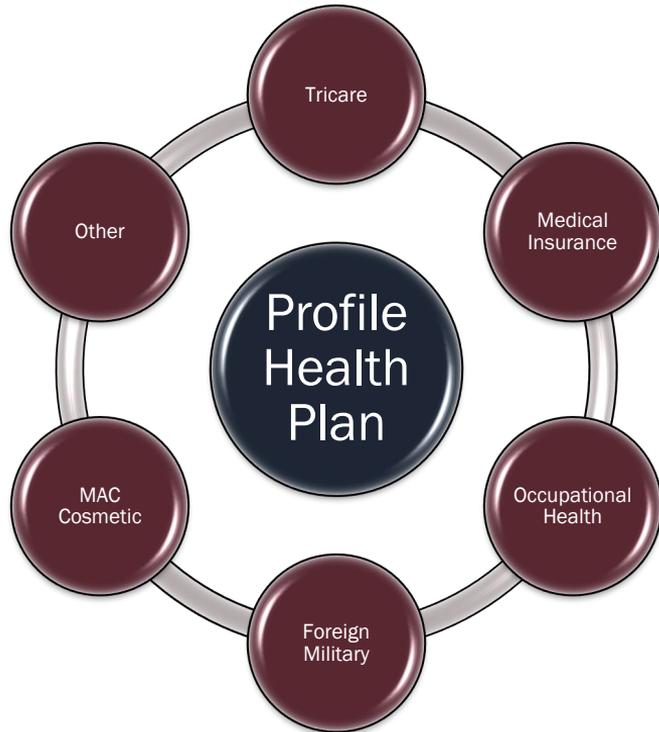
# MEDICAL INSURANCE



# New Medical Insurance Health Plan



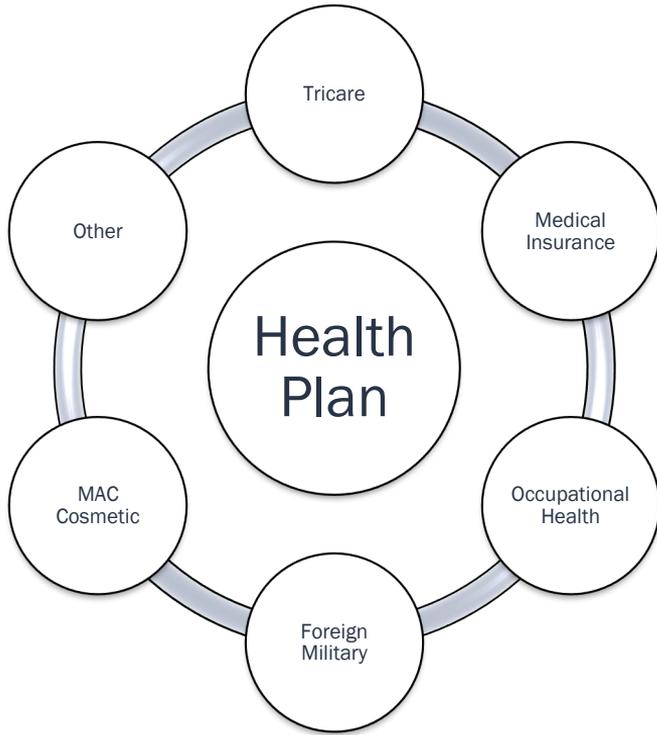
# Profile & Health Plans



- Profile & Health Plan
  - Populates during MPI  
Retrieve when patient is known to DEERS in GIQD.
  - Manually Create P&HP.
- Profile
  - Health Plan Header
  - 1 Profile  $\geq$  1 Health Plan



# Profile & Health Plans ~ Other Health Insurance



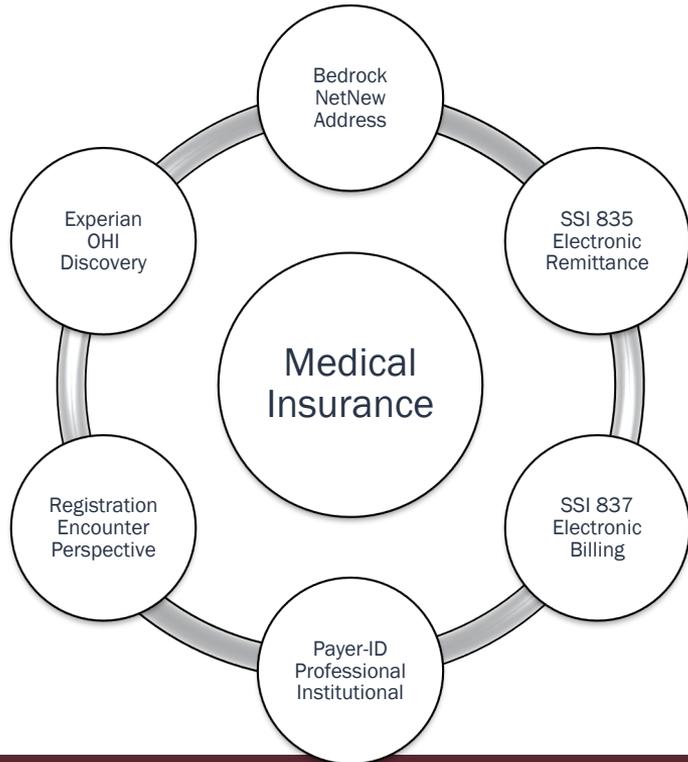
## Third Party Collections

- Tricare Profile and Health Plan (P&HP)
  - Medical Insurance is always 1<sup>st</sup>
- Other Profile and Health Plan
  - Medical Insurance is always 2<sup>nd</sup>

## Public Medical Service Accounts



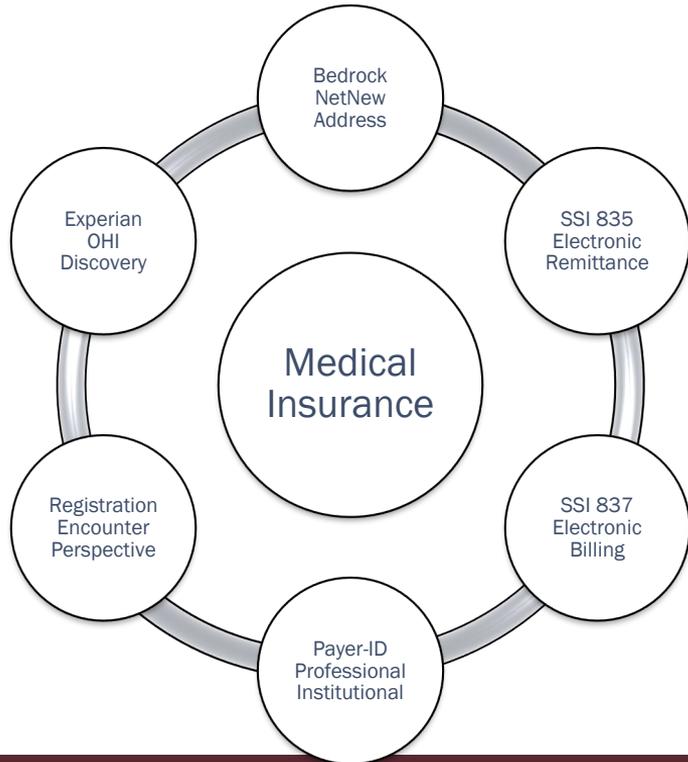
# Medical Insurance ~ Bedrock Data



- Bedrock
  - Repository for all P&HP
    - ✓ Name of Insurance
    - ✓ Address ~ Phone Number
      - Multiple Addresses
    - ✓ Payer-ID
      - Professional x1
      - Institutional x1
    - ✓ MTF Production



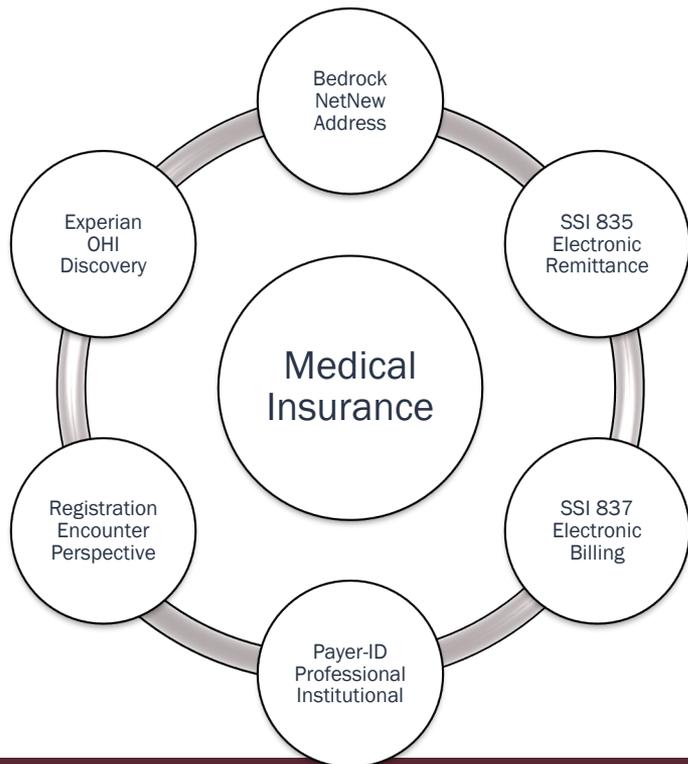
# Medical Insurance ~ Health Plan ~ Payer-ID



- 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



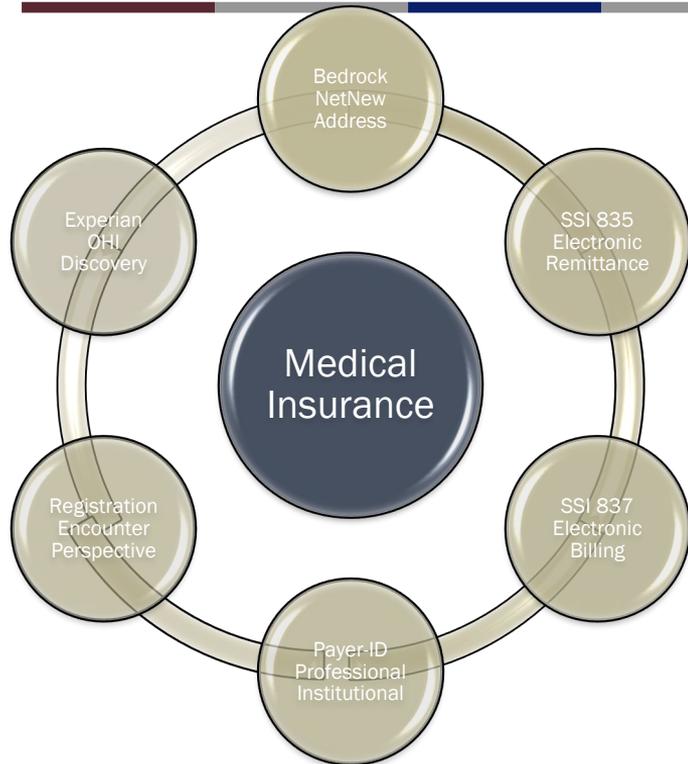
# Medical Insurance ~ SSI 835 ~ SSI 837



- 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



# Websites- DHA UBO Learning Center - SharePoint

- Revenue Cycle Documents
  - HelpFul HandOuts
  - Open Forum and Training PowerPoint Presentations
  - Webinars

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

<https://info.health.mil/bus/bm/ubo/Pages/UBORC.aspx>

- Documents are updated often, review Modified date for updated documents.



# 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)



# DHA UBO Learning Center - SharePoint

Name	Modified
 UBO HelpFul HandOut (p3a) WORKFLOW QUEUE A-Z 2024_0318	... March 19
 UBO HelpFul HandOut (p4a) DEEP DIVE A-Z 2024_0317	... March 19
 UBO HelpFul HandOut (x7a) Profile Health Plan List 2024_0325 ✱	... Yesterday at 6:18 PM
 v3p-1a UBO HelpFul HandOut ~ USER START UP_QUEUEES_Standard Process v1 2023_1127 PDF	... February 20
 v3p-2a UBO HelpFul HandOut ~ PDF CASH COLLECTION VOUCHER DD1131 GFEBS - MASTER	... February 20
 v3p-2a UBO HelpFul HandOut ~ POSTER UBO 2024_0220	... February 20
 v3p-4a UBO HelpFul HandOut ~ UBO PROCESS A-Z Appeals_CRS_Refunds_VA_More 2023_1220 PDF	... February 20
 v3p-4b UBO HelpFul HandOut ~ MEDICAL AFFIRMATIVE CLAIMS 20Oct23 PDF	... February 20
 v3p-4c UBO HelpFul HandOut ~ FOREIGN MILITARY OCONUS 2023_1030 PDF	... February 20
 v3p-5a UBO HelpFul HandOut ~ SSI INSURANCE Processes 2023_0321_0224 PDF	... February 20
 v3p-5aq UBO HelpFul HandOut ~ SSI ERROR 134220_134221 To be added 4a 2023-1128 PDF	... February 20
 v3p-7a UBO HelpFul HandOut ~ FORM P&HP_New Health Plan Request 2024_0205 PDF	... February 20
 v3p-7a UBO HelpFul HandOut ~ SSI_EXPERIAN_RevCycle Health Plans MD_LPE 24Jul23 pdf	... February 20
 v3p-8a UBO HelpFul HandOut ~ REPORTS_Discern_HealthAnalytics nt 24Jul23 PDF	... February 20
 v3p-8ap UBO HelpFul HandOut ~ PowerP HEALTHANALYTICS Sample 10Jul23	... February 20
 v3p-8b UBO HelpFul HandOut ~ REPORT HA Patient AR Analysis Deep Dive 2024_0129	... February 20
 v3r-1a UBO HelpFul HandOut ~ EXCEL CPA ROLES Crosswalk ABACUS 2022_1017	... January 29
 v3r-1a UBO HelpFul HandOut ~ EXCEL WORKFLOW QUEUE List 25May23	... January 29

*Improving Health and Building Readiness. Anytime, Anywhere - Always*



# QUESTIONS

