Healthcode Insurance Billing

We have integrated within ClinicOffice Healthcode. This enables you to submit invoices securely to an insurance company electronically via the Healthcode system. For the leading healthcare insurers, this has now become the preferred method of billing. It reduces the number of returned invoices compared with sending them yourself directly to the insurer and leads to greater efficiency for your clinic. There are no additional charges for signing up to Healthcode.

In order to use Healthcode, you will need the following:-

- Healthcode account with Site ID
- The relevant insurer provider number
- Industry Standard Codes

Setting up Healthcode

If you already have a Healthcode account, you can enter these details into ClinicOffice by following the steps below.

1) Go to the **View** menu (tab) within ClinicOffice

2) Click the **Program Settings** button

3) Click the **Global Settings** tab

4) Towards the bottom left click the blue link "**Setup Healthcode Billing**"

The main "Account Settings & Defaults" screen will now appear.

5) Please enter in your account's **Site ID**, **Username** and **Password**

6) Test that your account details are correct by clicking the "**Test connection to Healthcode**" button

💡**NOTE:** If you do not already have a Healthcode account, then you can always click the "**Contact Healthcode**" blue link to get in contact with them in order to setup a new account.

You will note that at the bottom of the Account Settings screen is a section called "**Default Claim Properties**". Within this section are different links to the relevant insurance company's properties. For example when you click on BUPA the screen to the right will appear.

The settings within this screen will always override your other claim settings for the particular insurer you are looking at. Generally, you will not need to touch this screen unless you are instructed by Healthcode to change a value within your claims. For example, an insurance company might always require a particular Authorisation Code so you would insert such a value into this screen.
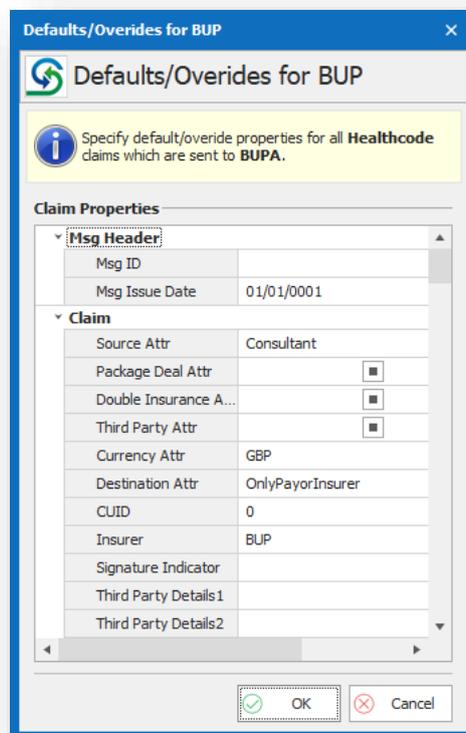
7) Click on the **Provider Numbers** tab and enter in your relevant provider numbers
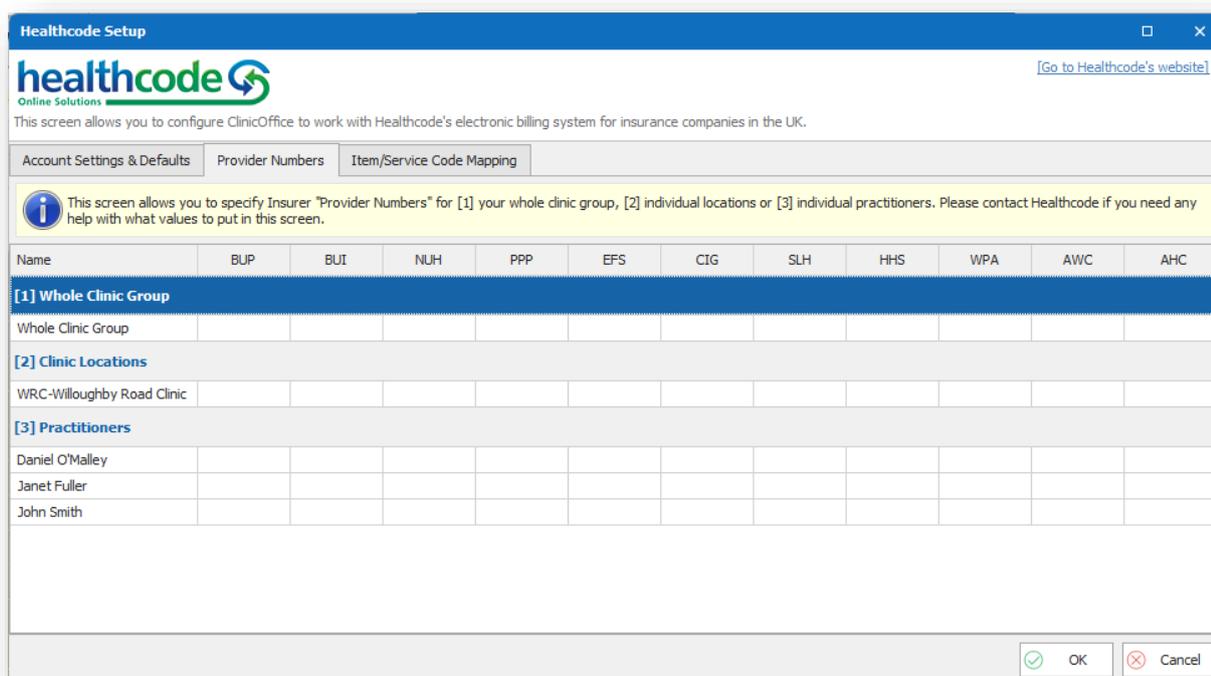
If you do not know what your provider number is then Healthcode will be able to provide you with this.

You will note that each insurance company is represented by a three symbol code; however, these abbreviations are not always obvious in what they represent. A key chart for this is displayed below.

Insurer Code	Insurer Name
BUP	Bupa
BUI	Bupa International
NUH	Aviva
PPP	AXA PPP
EFS	Exeter Friendly Society
CIG	Cigna Healthcare

Insurer Code	Insurer Name
BCW	Simplyhealth
SLH	VitalityHealth
HHS	Healix Health Services Ltd.
WPA	Western Provident Association
AWC	Allianz Worldwide Care
AHC	Alliance Health Corporate

8) Next click on the **Item/Service Code Mapping** tab

You will note that you have three columns; the first two are pulled from your items and services grid and are stored within ClinicOffice. The third column is where you would put the industry standard codes. The reason for this is that Healthcode will not know what your individual items or services represent when you are submitting an invoice.

9) From here enter in the industry codes for the services that can be claimed for and click **OK** once finished
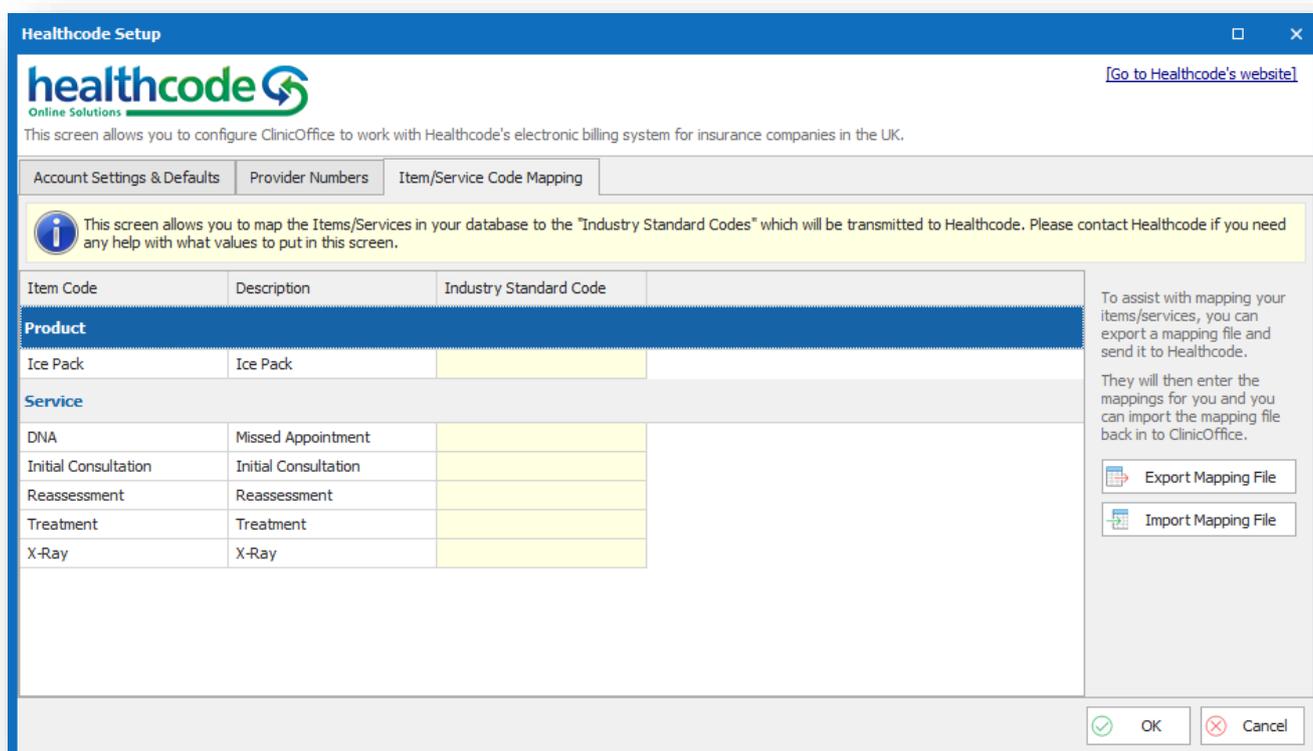
💡 **NOTE:** The Industry Standard Codes can be obtained from Healthcode if you do not already have them. To assist you with this you can click the **Export Mapping File,** save the CSV file locally and email it through to them. Once this has been filled in click the **Import Mapping File**, locate your CSV file, select it and click open. The relevant codes will then be filled in.

By following the above steps you will unlock the Healthcode Manager within ClinicOffice. The next phase of the setup is to help ClinicOffice identify which contact is an insurance company.

10) Go back to the **Home** menu within ClinicOffice

11) Click on the **Contacts** button to go to the contacts grid

12) Locate your insurance contacts, such as Bupa, AXA PPP etc. by using the **Search** button

13) Open the Insurance company's record and click the **Healthcode** button

14) Tick the checkbox present on the screen and select the **Healthcode insurer code** via the drop down menu

15) Click **OK**

16) Repeat steps 12 to 15 for each insurance company you have on record
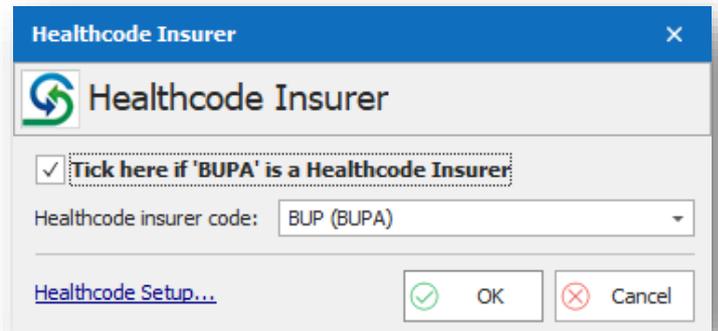
If you do not have an insurer on record but you will be billing them in the future you can create a new contact by clicking the **New** button within the Contact grid and from there enter in their details. Once done you can again follow steps 12 to 15. By doing this, when you now raise an invoice for an insurance company the option to submit to Healthcode will be available.

The last part of the setup phase is making sure the patient has the insurer marked as their insurance company and that they have an insurance reference entered. The next set of steps will go through this.

17) Within the main **Home** menu click the upper-half of the **Patients** button to go to the Patients grid

18) Open a patient's record by double clicking on it

19) Unless customised, expand the "**More Details**" group

20) Under the Payment Information fill in both the **Insurance Company** and **Insurance Ref** fields
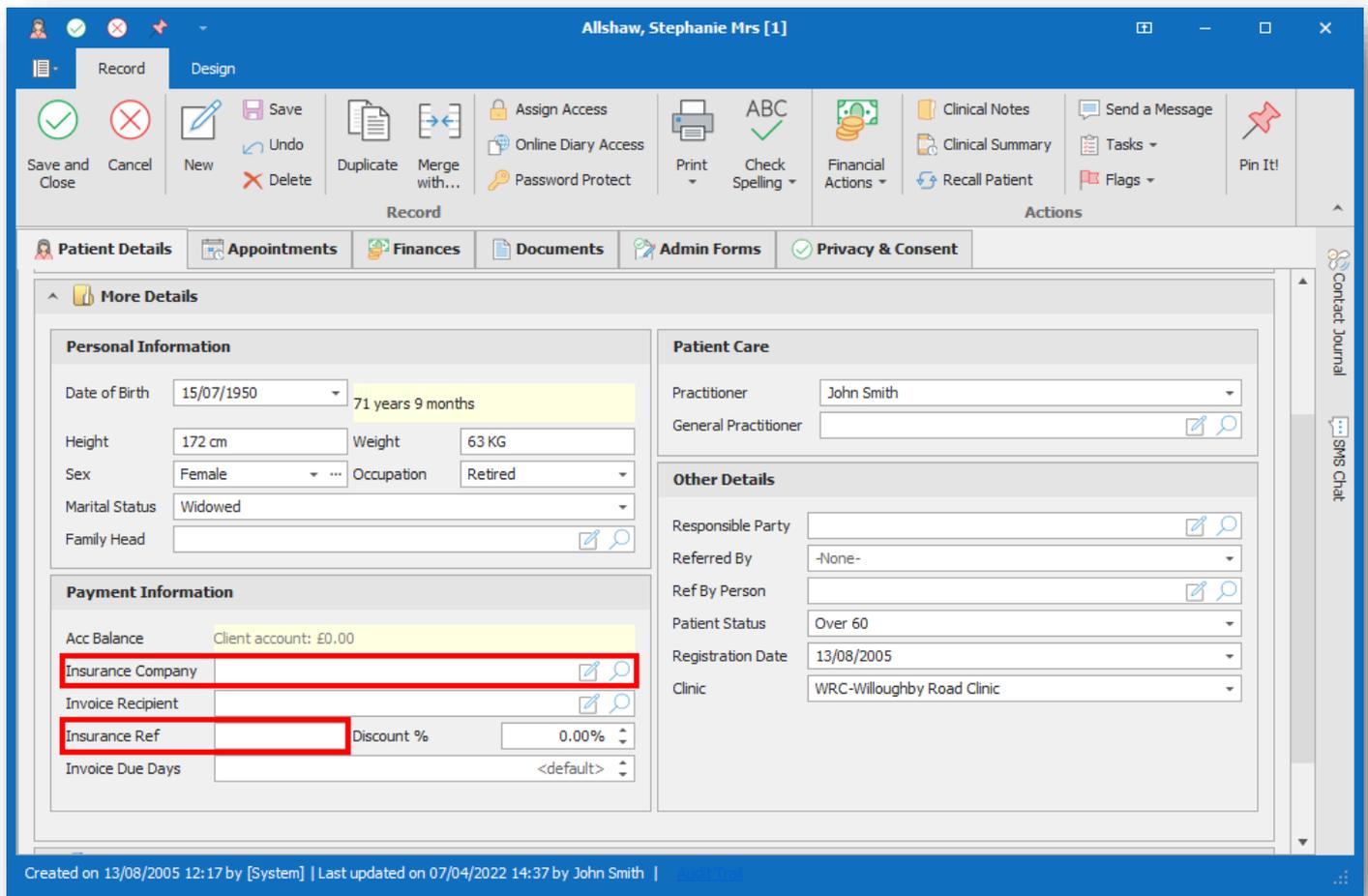
21) Click **Save and Close**

22) Repeat steps 18 to 21 for each patient that is paying via their insurer

The above steps are the main prerequisites that will enable you and your company to submit invoices to your insurer via Healthcode. There may, however, be times when the invoice will still fail. We will now consider this part way through the next subsection.

Submitting Invoices via Healthcode

In this section we will consider how you would raise an invoice and then submit it to Healthcode. If you have not already setup your Healthcode account within ClinicOffice then it is advised that you follow the previous section "Setting up Healthcode".

The scenario we will consider is that an appointment has been completed for a patient that has insurance and now an invoice needs to be raised and then submitted to Healthcode.

1) Go to the patient's appointment within the Diary

2) Right-click on the appointment and select **Create Invoice**

3) Select to "**Invoice the patient's Insurance Company**" (i.e. Invoice: BUPA)

4) If you have a default charge item that you wish to use click **Yes** to the next message

If you do not have a default charge item for this appointment type then you can add a service to the invoice by pressing the small **+** symbol at the bottom of the "Invoice Items" and then selecting the item via the Item Code column. For more information on how to add a new invoice line please see the section "Adding Lines to an Invoice". If you wish to know how to create a default charge amount for an appointment type please see the section "Creating a New Appointment Type".

5) Once the correct charge amount has been inserted click the **Healthcode Claim** button

6) This should bring up the Healthcode Claim window, click **Submit to Healthcode**

So long as your setup is correct the claim will automatically be submitted. If, however, something is missing from your setup then an error message will appear under the "Claim History" section, this is usually self-explanatory. If you do need assistance, please contact either Healthcode or Pioneer Software (customers on our support plan can call or email our support team, non-supported customers can post for free on our support forum forum.clinicoffice.co.uk).

Healthcode Claim Manager

Using the Claim Manager, ClinicOffice provides you with a way to overview your submitted claims, claims that are pending and invoices that are without any claims. You can access the claims manager by clicking on the lower-half of the **Finances** button and selecting **Healthcode Claims**. Alternatively, you can access it by going to the **Tools** menu and clicking the **Healthcode Claims** button there. This will bring up the window below.

The first screen that you will see when opening the Healthcode Claims Manager are the invoices that are without a claim. So these are invoices that qualify to have a claim because they are invoiced to an insurer registered with Healthcode but as of yet a claim has not been raised. If you always submit a claim to Healthcode whenever raising an invoice then this screen will be empty, however, this screen does provide you with an alternative way to create claims on bulk. You can do this by clicking the **"Select All"** link if you wish to create a claim for all the invoices or tick the checkbox under the "Select" column for individual invoices and click the **Create Healthcode Claims** button. This screen is also useful because it allows you to check that the invoices that need claims have actually been created.

The Claim Manager will allow you to select a date range for your claims. By default, the grid is grouped by the "Insurer" but you can change this so that the claims are grouped by "Month" or remove the grouping altogether. You can also right-click on an invoice and select to open it. In the next two screens we will consider the right-click menu will also allow you to open the individual claims as well. You can also access the main Healthcode Setup screen from the blue link towards the bottom left.

If you are in the process of a claim and have not had time to complete but decide to save it or the claim has failed for a reason, then these claims will show on the "Show Pending Claims" section of the Claim Manager. The next screenshot demonstrates this.

By looking at the screen above the status of the claims become evident. A "**Failed**" status is highlighted in red and a message of why the claim failed will be visible below the claim line. In the example above the reason for the failure is that the invoiced item has no industry code assigned to it. A "**Pending**" status is highlighted in blue and will display when the claim was initially created. You can correct or complete a claim by right-clicking on the claim, select **Open Claim**, make the needed adjustments/corrections and click **Submit to Healthcode**. All being well your claim should go through.

Healthcode Claim Manager – Submitted Claims

The last section of the Claim Manager is the "Submitted Claims" and these are claims that have been successfully submitted to Healthcode. Now, all that you need to do is wait for the insurer to either pay the submitted claim or indicate why they are unable to. This last phase though is handled via Healthcode's web-based interface.

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