

## Adding a New Insurance Payer

### Three Step Process

Adding a new Insurance Payer (insurance plan or company), is a three step process:

1. Enter insurance company, including the address where the claim is submitted
2. Link fee schedule
3. Initialize providers

### Insurance Wizard

The insurance Payer wizard can be accessed from several different areas of ODPro.

1. You can select Add Insurance Payer Wizard under the Wizards menu item, OR
2. You can click on the Insurance Wizard button located in the lower left hand side of the Primary, Secondary or Other Insurance view window, OR
3. You can use the Wizard Button located in the lower right hand side of the Insurance Plans View window.

### Steps to Adding a New Insurance Payer

#### Step 1

- Open the Insurance Wizard
- Add the Insurance Company Name and Address, Payer Group and whether you accept assignments.
- Click Next

#### Step 2

- Verify that correct fee schedule is linked to insurance payer
- Click Finish
- If you want to add another Insurance Payer, click Yes otherwise click No

#### Step 3

- Under the Record menu item, select Insurance Related Records
- Select Provider Payor ID Numbers
- Select Provider on bottom left side
- Click Initialize (note insurance company is now listed under Payor/Plan name column)
- Add Provider ID and Group Number as needed
- Click Close

**(IMPORTANT: INITIALIZE ONLY PROVIDERS, DO NOT INITIALIZE 99999)**