

# Changing Payer Periods Even After Encounters to Re-Bill Correctly

Note Please: I apologize for the need to make this a two part file while I figure how to avoid it. It is caused by the 2MB upload file size limit for Wiki, which makes screenshots hard to use, even while a picture is worth a thousand words. I prefer to provide pictures when I can. I hope you agree. Joe Holzer

Situation: Patient provided data showing Medicare was primary payer, but Medicare says effective date was later, and secondary payer listed is actually primary. This shows you how to fix that. The screenshot below shows the Patient Demographics as they have been, in the Insurance area at the bottom.

**OpenEMR - Mozilla Firefox**  
File Edit View History Bookmarks Tools Help  
http://localhost/openemr/interface/main/main\_screen.php?auth=login  
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**OpenEMR**  
v3.1.0 on Joe X61-T3 : Logged in : Joseph Holzer (CHHHC) Active Patient: Sy'stem Test (1) DOB: 2000-01-01 Age: 9 December 17, 2009

**Primary Insurance from 2001-01-01 until Present :**  
Medicare Part B  
PO Box 4803  
Syracuse, NY 13221  
Policy Number: 2A34B12  
Plan Name:  
Group Number:  
Subscriber: Sy'stem Test(self)  
S.S.: 111-22-3333  
D.O.B.: 2000-01-01  
Phone:  
Subscriber Address: Funnyfarm Lane  
Wowwee , NY , USA 888888  
Subscriber Employer: Somethong  
NY , USA  
Accept Assignment: YES

**Secondary Insurance from 2006-01-01 until Present :**  
Total Care  
PO Box 11507  
Syracuse, NY 13218  
Policy Number: MAF12345  
Plan Name: NYS House Calls  
Group Number:  
Subscriber: Sy'stem Test(self)  
S.S.: 111-22-3333  
D.O.B.: 2000-01-01  
Phone:  
Subscriber Address: Funnyfarm Lane  
Wowwee , NY , USA 888888  
Subscriber Employer: Somethong  
NY , USA  
Accept Assignment: YES

**Medical Problems (More):**  
HTN  
camos testing  
Problem Test  
Prior Auth thru 5/09 - 5 Sessions Joe Test 3  
Medications (More):  
Loestrin 24 Fe  
Immunizations (More):

**Notes (More)**  
Balance Due \$625.01  
Other 2009-09-19 14:34 (Joe to Joe) From All Dutch Psych Forms for All dates: No real data - Leave balank  
Bill/Collect 2009-03-07 16:05 (Lynne to Lynne) can this be an area to use for the prior auths?

Done  
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You must click on the (More) at the top of that frame to allow edits of the Insurance settings to correct them to what was actually the case for the earlier visits, with the actual Effective Date if it differs (you can leave the earliest effective date if it does not affect any of your actual encounters, even if the policy was not really in place at that earlier date; OpenEMR only uses the date to determine who is to be billed in what order). Change the Primary to the correct payer (Total Care in this case) and fix any as needed of the correct policy number, plan name, policy holder, etc, with the correct Effective Date. Change the Secondary to Unassigned – you can leave all the rest as-is to save typing later. See the screenshot below for details. If the correct payer name and address data is not yet entered, use the Admin – Practice – Insurance to set that up. Remember to save before leaving the demographics. By changing the effective date, you will change the From / To period shown in bold above the insurance info.

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OpenEMR

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☐ Fax/Scan  
☐ Addr Bk  
☐ Chart Trk  
☐ Billing  
☐ Superbill  
☐ Auth/notes  
☐ New Pt  
☒ Patient  
☐ History  
☐ Encounters  
☐ New Enctr  
☐ Rx  
☐ Issues  
☐ Immunize  
☐ Documents  
☐ Pt Report  
☐ Pt Notes  
☐ Transact  
☐ Summary  
☐ Encounter  
☐ Charges

Active Patient: Sy'stem Test (1)  
Active Encounter: None  
Popups

Find: test  
by: Name ID SSN DOB Any Filter  
Logout Help

Done

Primary Insurance Provider: Total Care Search/Add Insurer

Plan Name: Subscriber: Sy'stem Test

Effective Date: 2006-01-01 Relationship: Self (Browse)

Policy Number: MAF12345 D.O.B.: 2000-01-01 S.S.: 111-22-3333 Sex: Male

Group Number: Subscriber Address: Funnyfarm Lane

Subscriber Employer (SE) (if unemployed enter Student, PT Student, or leave blank): Somethong City: Wowwee State: New York Add

SE Address: Zip Code: 888888 Country: USA Add

SE City: SE State: New York Add

SE Zip Code: SE Country: USA Add

CoPay: Accept Assignment: YES

Secondary Insurance Provider: Unassigned Search/Add Insurer

Plan Name: NYS House Calls Subscriber: Sy'stem Test

Effective Date: 2006-01-01 Relationship: Self (Browse)

Policy Number: MAF12345 D.O.B.: 2000-01-01 S.S.: 111-22-3333 Sex: Male

Medical Problems (More)

HTN  
camos testing  
Problem Test  
Prior Auth thru 5/09 - 5 Sessions Joe Test 3

Medications (More)

Loestrin 24 Fe

Immunizations (More)

Notes (More)

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Once you have saved that, you will notice that the Demographics now shows only the single insurer, with its Effective date for the "From" and "Present" as the "To" date, per the screenshot below.

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☐ Rx  
☐ Issues  
☐ Immunize  
☐ Documents  
☐ Pt Report  
☐ Pt Notes  
☐ Transact  
☐ Summary  
☐ Encounter  
☐ Charges

Active Patient: Sy'stem Test (1)  
Active Encounter: None  
Popups

Find: test  
by: Name ID SSN DOB Any Filter  
Logout Help

Pharmacy:  
 HIPAA Notice Received:  
 Allow Mail Message:  
 Allow Email: NO  
 PCP: never!  
 PCP Phone:  
 Other Providers: Ragaab, oncologist, pain MD, Ear specialist, pulmonologist, or  
 Occupation: Something  
 Employer Address:  
 State: New York  
 Country: USA  
 Race/Ethnicity: Caucasian  
 Economic Level: unbelievable  
 Own/Rent/Share What?:  
 Smoke/CO Detect:  
 Year Arrived to Area: 1000  
 weapons: Locked medications  
 Allow Voice Message:  
 Allow SMS: NO  
 Leave Message With:  
 PCP Fax:  
 Employer Name: Somethong  
 City:  
 Postal Code:  
 Family Size:  
 Heating Type:  
 Fire extinguisher: why bother  
 Registration Date: 2008-12-03

Employer  
 Stats  
 Misc

Primary Insurance from 2006-01-01 until Present :  
 Total Care  
 PO Box 11507  
 Syracuse, NY 13218  
 Policy Number: MAF12345  
 Plan Name:  
 Group Number:  
 Subscriber:  
 Sy'stem Test(self)  
 S.S.: 111-22-3333  
 D.O.B.: 2000-01-01  
 Phone:  
 Subscriber Address:  
 Funnyfarm Lane  
 Wowwee, NY, USA 888888  
 Subscriber Employer:  
 Somethong  
 NY, USA

Accept Assignment: YES

Medical Problems (More)  
 HTN  
 camos testing  
 Problem Test  
 Prior Auth thru 5/09 - 5 Sessions Joe Test 3  
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 Immunizations (More)

Notes (More)  
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Done

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Now again go back to edit the Insurance info by selecting the (More) at the frame top, and click on the Insurance box, then begin to edit per the screenshot below. Note that we again select the previous primary of Medicare, and the previous secondary of Total Care, and again fix any plan names, etc. as needed. Note that the previously left secondary info is still there, even though the "Unassigned" made it sort of invisible to the claims process. This time, though, we will make the Effective Date for the Medicare what it was supposed to be AND we make the effective date for the secondary the same date. That will assure that claims for services before Medicare went into effect will be billed to Total Care, but from the effective date of Medicare, Total Care will only be billed once the primary, Medicare, has been completed in the EOB area (see "Billing" below).



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☐ Rx  
☐ Issues  
☐ Immunize  
☐ Documents  
☐ Pt Report  
☐ Pt Notes  
☐ Transact  
☐ Summary  
☐ Encounter  
☐ Charges

Active Patient: Sy'stem Test (1)  
Active Encounter: None  
Popups

Find: test  
by: Name ID SSN DOB Any Filter  
Logout Help

Done

Primary Insurance Provider: Medicare Part B Search/Add Insurer

Plan Name:   
 Effective Date: 2009-09-01  
 Policy Number: 2A34B12  
 Group Number:   
 Subscriber Employer (SE) (if unemployed enter Student, PT Student, or leave blank):   
 SE Address:   
 SE City:  SE State: New York Add  
 SE Zip Code:  SE Country: USA Add

Subscriber: Sy'stem  Test  
 Relationship: Self (Browse)  
 D.O.B.: 2000-01-01 S.S.: 111-22-3333 Sex: Male  
 Subscriber Address: Funnyfarm Lane  
 City: Wowwee State: New York Add  
 Zip Code: 888888 Country: USA Add  
 Subscriber Phone:   
 CoPay:   
 Accept Assignment: YES

Secondary Insurance Provider: Total Care Search/Add Insurer

Plan Name: NYS House Calls  
 Effective Date: 2009-09-01  
 Policy Number: MAF12345

Subscriber: Sy'stem  Test  
 Relationship: Self (Browse)  
 D.O.B.: 2000-01-01 S.S.: 111-22-3333 Sex: Male

Medical Problems (More)

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Again, save after you have made the changes, and the first screenshot in Part 2 should reflect the new data at the bottom of Demographics. You will notice it shows different periods for each of the insurance coverages. That data will now be used by OpenEMR, based on service date, to prepare bills. As you can guess, over time you are likely to have multiples of each shown for each patient as they change insurers or plans. You should follow this process any time information must change in the bill in order to be paid properly. So, for example, you must create a new period every time a BCBS policy number changes, etc. Please refer to the file labeled "Part 2" for the rest of the instructions. Again I apologize. Joe Holzer