



Provider Setup and Usage

This document covers information on setting up providers in Nightingale Notes to have them appear in the appropriate locations in claims. In most cases, a provider (referring, rendering, service facility and ordering) should appear first at the claim level, and then if a different provider of the same type appears in the same client's claim, it should appear at the service line level.

There are two different provider types that have special circumstances. An attending provider only appears in an Institutional claim, and only at the claim level. An ordering provider can be included in both Institutional and Professional claims, but only appears at the service line level, never at the claim level.

We have recently changed the workflow behind the scenes, to accommodate complex scenarios, where providers may be different in some activities, so the claim needs to reflect that. However, there are customers that do not need that level of complexity and can simply include the needed providers in the client's record, in **Providers/Programs**, instead of adding them to individual activities.

Rendering Providers

Rendering providers are a little different from other providers, in that they can be added as the employee performing the activity or as a standard provider, like the other provider types that can be selected in the activity.

Employee as Rendering Provider

This functionality will use the assigned employee in an activity to add the employee as a rendering provider at the claim level, along with an atypical provider ID or NPI. This may be used when the employee is filling in their own activities and the employee should be included in the claim as the rendering provider.

Setup – Services

If there are some services where a rendering provider is always needed in a claim, and the Assigned employee in the activity is the provider, in **Setup** ⇒ **Services**, check the **Autofill employee as rendering provider** field. Then every time this service is selected in an activity, the employee will be added as a rendering provider automatically. The **Is employee a rendering provider?** box will be autofilled. Please note that it can be unchecked, if there are some cases where the employee is not to be included in the claim as a rendering provider.

Setup – Pay Sources

The only time a specific template needs to be used for a provider is when the provider has an atypical provider identifier (API) instead of an NPI, and that will be included in a REF*G2 segment. If you are unsure if you would

need to use this template, please contact support@champsoftware.com and we can assist you to determine if this is necessary.

This template, called “Prof – Rendering Provider – API” will produce claim segments that contain the provider name and API in a reference identification qualifier of Provider Commercial Number (REF*G2) at both the claim level in the 2310B loop, as well as at the service line level in the 2420A loop, when there is more than one rendering provider per claim. Those segments will look like this:

```
NM1*82*1*[EMPLOYEE LAST NAME]*[EMPLOYEE FIRST NAME]~
REF*G2*[API]~
```

If you need to include an API that requires a different qualifier than G2, please contact support@champsoftware.com with specifics, and we will assist you.

Setup – Employees

Edit the employee record in **Setup** and go to the **Employee Information** tab. Add the employee’s identifier in the **NPI** or **API** field, as needed.

Client Details > Providers/Programs

There is no need to fill in the employee in the **Providers/Programs** screen, in the **Assigned employees** field to create claims with the employee. It will all be controlled by the employees assigned to the activity.

Activity Details

When creating a new activity, and the service selected is filled in as mentioned in the “Setup – Services” section above, the **Is employee a rendering provider?** will be autofilled. This means that the user filling in the activity information doesn’t have to do anything extra to make sure the employee is added to the claim.

Please note that the employee will be autofilled in the **Is employee a rendering provider** field, but the field is still editable in the activity. The box can be checked or unchecked as needed to make sure the employee is included, when needed, in the claim. This means that the functionality still works to add the employee to the claim in the appropriate places if the **Is employee a rendering provider** box is checked.

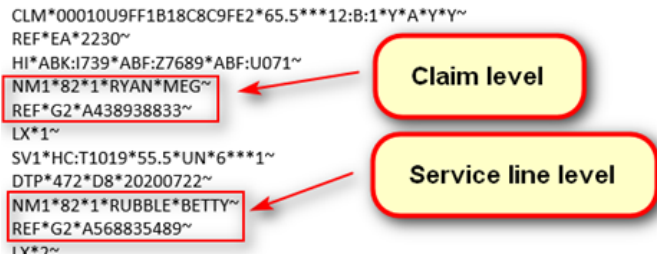
If the Setup – **Services – Autofill employee as rendering provider** box is not checked, it won’t autofill the **Is employee a rendering provider?** box, but it can be checked manually in the activity to add the employee as a rendering provider in the claim.

Claim Creation

In any case unless you are using a provider that has an atypical provider identifier (API), you can create the claim using any template and it will pull in the providers appropriately.

If there is only one employee included in the claim, that employee will be entered at the claim level, but if there is more than one employee, one will be listed at the claim level, and all others will be listed in the service lines for the services they provided.

Any services that were performed by the employee listed at the claim level will not be repeated at the service line level.



If the *Is employee a rendering provider?* box is checked and the *Provider* and *Type* fields are also filled in with another rendering provider, please note that the employee will default to be the rendering provider to be included for this service line, or at the claim level. It will not create a duplicate rendering provider line.

Using Providers that are not Employees

In cases where you need to include providers in claims that are physicians, physician assistants, nurse practitioners, etc., and the providers are not the employee adding activity information, you would add them to Nightingale Notes in *Setup – Providers*, and then add the appropriate provider and provider type (Attending, Ordering, Referring, Rendering, Supervising) to the client’s record. See the “Provider Types in Claims” section below for more details about each provider type.

You can also include a “service facility location” in Nightingale Notes, by setting it up in the *Providers* screen. However, the setup is slightly different for a non-person entity. See instructions below.

For information on including the employee assigned in the activity as the rendering provider, see the section above entitled, “Employee as Rendering Provider.”

Setup – Attending, Ordering, Referring, Rendering, Supervising Providers

In *Setup*, go to the *Providers* screen. Click on *New Provider*.

Fill in fields as indicated below:

- **Last name** – If credentials are required, add them after the last name.
- **First name**
- **NPI**
- **Taxonomy** - Situational. It can be filled in for these providers and claim types, if needed:
 - Rendering Provider in Professional claim
 - Attending Provider in Institutional claim

Setup – Service Facility Location Provider

In *Setup*, go to the *Providers* screen. Click on *New Provider*.

Put a checkmark in the ***Is this provider a service facility?*** box.

Fill in ***Business name***, address fields (including 9-digit zip code) and ***NPI***. Save.

Setup – Pay Sources

As part of this new setup, as mentioned in the section on “Setup – Pay Sources” under “Employee as Rendering Provider,” the only template that is specifically needed for billing providers a certain way is the “Prof – Rendering Provider – API” template, which includes an atypical provider identifier (API) in a REF*G2 segment, along with the rendering providers name. This is done in cases where a rendering provider is required that does not have an NPI. Otherwise, all the standard templates will include the appropriate provider segments that include the providers’ names and NPIs. If you have further questions about this, please contact support@champsoftware.com.

Client Details > Providers/Programs

You can add any provider type to the ***Providers/Programs*** tab (except for Ordering, which is never allowed at the claim level), instead of adding providers to activities. In the case where no provider of a certain type is added to the activities being billed in a claim, but there is a provider listed in ***Providers/Programs***, then that provider will be added to the claim level information.

As mentioned before, attending providers are only added to the claim level, and only for Institutional claims. So that provider type is not listed in the ***Type*** field in activities.

Adding Providers to Claims

To add a provider to a claim, for all provider types except for attending, the provider will be added to activities, either by:

- Checking the ***Is employee a rendering provider*** checkbox, which will then pull the employee into the claim OR
- Selecting a provider from the ***Provider*** dropdown list, and then also selecting a provider type from the ***Type*** dropdown

The first activity that has a provider added will cause that provider to be listed at the claim level. This provider will then be compared to any other providers of the same type that are fed into the claim and not be included at the service line level. If the provider being compared to the claim level provider is a different person than the one at the claim level, then that provider will be included at the service line level.

In the case that the employee and another rendering provider are added to the same activity, the employee will autofill to the claim, and the other provider will not be added. This ensures that no duplicate rendering provider goes into the claim, which will cause a rejection.

The one exception to this is for ordering providers. An ordering provider should never appear at the claim level, so it will automatically be listed in the service line, if added to an activity.

And, as mentioned above, if no provider of a certain type is listed in an activity, program code will look at the Providers/Programs tab for the client to see if that provider type is listed there. If it is, then that provider and NPI will be added to the claim level in a segment for that provider type.

Provider Types in Claims

Provider types that can be included in claims are listed below, including what types of claims they can be in, as well as some specific rules for the types of bills.

Billing Provider

- Always included in Professional and Institutional claims
- Non-person entity, not an individual
- This is a required claim loop, that applies to the agency billing the claim.
- Includes:
 - From **Setup > Pay Sources > Billing Provider** tab: Provider name, NPI, Taxonomy Code, Federal Tax ID, address (do not include PO Box)
 - From **Setup > Agency Information** tab: Contact information (submitter name, phone and fax numbers)

Pay-To Provider

- Not currently supported in Nightingale Notes

Attending Provider

- Included in Institutional claims only
- This claim can only be a person, not an entity
- This provider can only be added to **Client Details > Providers/Programs** tab
- Required – The Attending Provider is the individual who has overall responsibility for the patient’s medical care and treatment reported in this claim

Referring Provider

- Can be included in both Professional and Institutional claims
- Situational - Required when the claim involves a referral.
- Includes provider name and NPI

Rendering Provider

- Can be included in both Professional and Institutional claims
- In Professional claims, a rendering provider can be a person or a non-person entity. *However, Nightingale Notes does not currently support Rendering Providers that are entities. If this is required by your payer, please contact Champ Support and accommodations will be made.*
- In Institutional claims, a rendering provider can only be a person

- Situational – Required when the Rendering Provider information is different than that which is carried in the Billing Provider loop.
- Used for all types of rendering providers include laboratories. The Rendering Provider is the person or company (laboratory or other facility) who rendered the care. Please note information above that states that Champ does not support Rendering Providers that are entities.
- Includes provider name, NPI and taxonomy code (if included in Setup)

Service Facility Location

- Can be used in both Professional and Institutional claims
- Situational – Required when the location of the health care service is different than that which is carried in the Billing Provider loop.
- When an organization health care provider's NPI is provided to identify the Service Location, the organization health care provider must be external to the entity identified as the Billing Provider. It is not permissible to report an organization health care provider NPI as the service location if the entity being identified is a component of the Billing Provider.
- The purpose of this provider type is to identify specifically where the service was rendered.
- Includes service facility name, NPI, location address and legacy provider ID (if included in Setup)

Ordering Provider

- Can be used in Professional and Institutional claims
- This is a service line level provider only.
- Situational – Required when the service was ordered by a provider who is different from the rendering provider for the service line.

Supervising Provider

- Can be used in Professional claims only
- Situational – Required when the rendering provider is supervised by a physician.

Ambulance Pickup and Drop-off Locations

- Not currently supported in Nightingale Notes