

Payer ID & EDI Enrollment

Understanding how to locate and obtain the Payer ID information from the insurer is a vital step before billing can happen. The EDI enrollment process must also be verified before an electronic claim is submitted.

Insurance Payer ID

When working THIS...

Follow these STEPS...

Locating the Payer ID

Payer List - Professional (CMS1500) & Institutional (UB04)

1. Click **Practice Settings** from the left-hand menu.
2. Select **Billing & Insurances** from the top tabs.
3. Click **Set Up** from the 'Insurance Features' section.
4. Add your insurance company(s) by clicking **+New**. Complete the information needed. ****NOTE:** Payer ID lists are also found here - <https://cms.officeally.com/Pages/ResourceCenter/PayerLists/PayerList.aspx> ****DO NOT PUT IN A PAYER ID FOR MAGELLAN.** Instructions for Magellan found below.
5. Click **Save** and **Done**.

Magellan Insurance ONLY

1. Click **Practice Settings** from the left-hand menu.
2. Select **Billing & Insurances** from the top tabs.
3. Click **Set Up** from the 'Insurance Features' section.
4. Add Magellan by clicking **+New**. ****NOTE:** Magellan's name needs to be edited to say: Magellan PAYER ID: 01260
5. Next, Delete the 01260 from the Payer ID field...**IF A PAYER ID IS ENTERED FOR MAGELLAN THE CLAIM WILL BE DENIED.**
6. Enter the **PO Box, City, State, and Zip**.
7. Click **Save** and **Done**.

EDI Enrollment

When working THIS...	Follow these STEPS...
EDI Enrollment Verification Payer Enrollment Forms (by State): Click here to view Electronic Remittance (ERA/835) Enrollment Forms	<ol style="list-style-type: none">1. EDI enrollment is required for filing electronic claims. <u>If you have not done so, please follow the steps below.</u>2. Go to the URL - https://cms.officeally.com/Pages/ResourceCenter/PayerEDIEnrollmentForms.aspx3. Find the payer you wish to file electronic claims with.4. Complete the form, then send an email/fax listed on the form instructions. **NOTE: EDI enrollment can take up to 60 days