Insurance Billing Setup Checklist

A step-by-step guide to get started with insurance billing

Getting Started - Steps to Complete Outside of OptiMantra

Credentialing - Authorizes you to submit claims and receive payment from insurance payers

- ☐ Obtain individual and/or organizational NPI(s).
- ☐ Complete credentialing with all insurance companies you plan to bill.
- ☐ Track credentialing details for each insurer: insurance company, NPI used, main contact, date credentialing approved, claims address, payer ID.

EDI, ERA, EFT - Enables electronic claim submission, payment posting, and direct deposit of insurance payments. You must enroll with each payer you plan to bill.

- ☐ Enroll in **EDI** for electronic claim submission.
- ☐ Enroll in **ERA** for electronic remittance advice.
- ☐ Enroll in **EFT** for direct deposit of claim payments.

Your OptiMantra Setup

Once credentialing and enrollment are complete, you can begin configuring OptiMantra for insurance billing.

Your to-do list:

- ☐ Set up your payer contact list: **Settings > Business > Contact List**
  - ☐ Add insurance companies you plan to bill, whether in-network or out-of-network.
  - ☐ Enter: Insurance company name, claims address, Office Ally Payer ID, and Office Ally Eligibility ID for each payer.
  - ☐ Set Contact Type to “Insurance (Payer)”.
- ☐ Set up insurance billing providers: **Settings > Insurance > Insurance Billing Providers**
  - ☐ Add an insurance billing provider profile.
  - ☐ Create separate billing profiles if the provider has multiple credentials or NPIs
  - ☐ Select the default billing location and the default billing provider for claim submission in Settings > Business > Provider Settings > Provider profile.
- ☐ Add CPT codes to your services: **Settings > Services > Services (Fee Schedule)**
  - ☐ Enter CPT codes for all billable services.
  - ☐ Set default modifiers and place of service, where applicable.

Optional steps:

- ☐ Bulk upload patient insurance information via ticket to OptiMantra support
- ☐ Ensure patient portal prompts new patients to enter insurance information by unchecking “hide insurance tab” on patient portal settings.

Have questions? Reach out to us by submitting a ticket or refer to our knowledge base article for getting started with insurance billing!