Helper Tips and Tricks Volume 3

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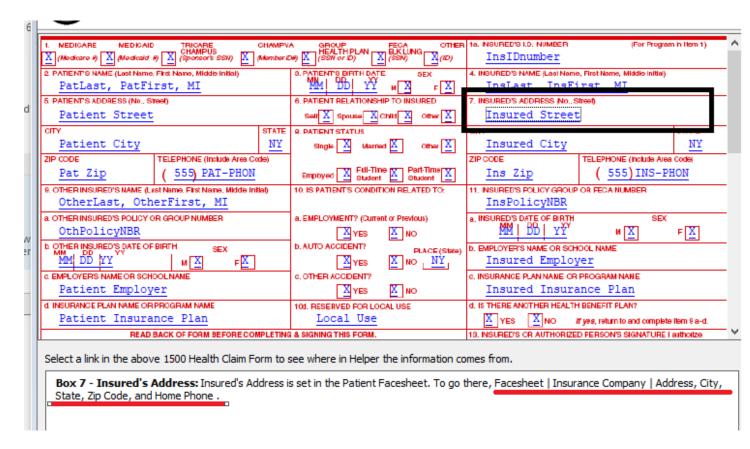# Billing Ledger

Ever wonder where in the Helper program the information for the HCFA forms comes from? Well, in the Insurance section of the clients facesheet there is a link to see this. It is called "Claim Guidance". It is found at the bottom of the Insurance company page.
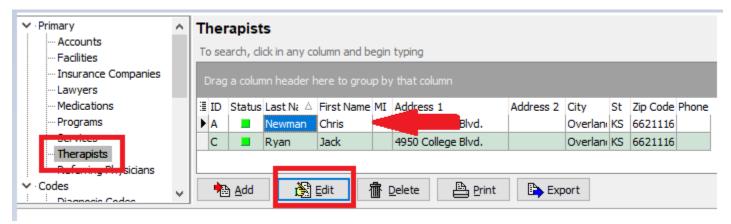
When you click on "Claim Guidance" a screen will pop up representing a HCFA 1500 Claim Form. In each box there is a link. Click on a link, and it will show where in the Helper program to enter the information.
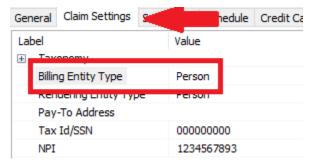

For example, to see the insured's address information, and where it needs to be added on the facesheet, click on the link "Insured Street Address". It will display at the bottom of the window, where in the facesheet the information should be updated.

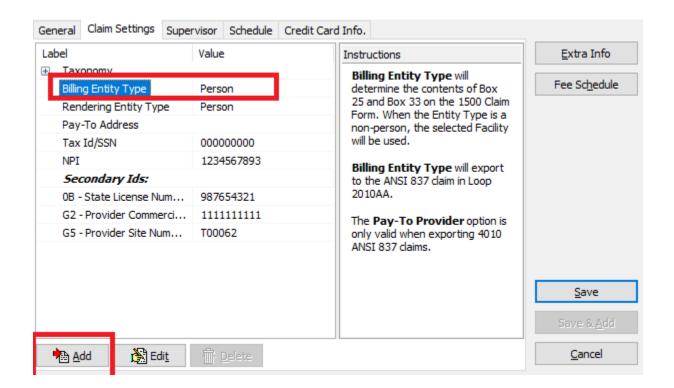# Updating Billing Settings – Person vs. Non-Person

How to populate Box 33 on HCFA, or loop 2010AA for electronic claims? This is a common question the Helper support team receives. Person equals Individual, Non-Person equals Business. Either it needs to be the personal information of the provider, or the company (non-person) billing information. First, go to the Therapist Library and select the therapist to update. Click on "EDIT" near the bottom of the window.

Once the Therapist window opens, select the "Claim Settings" tab. From here, look at the line "Billing Entity Type". To the right, look at the value column. If it says "person" or is blank, then box 33/loop 2010AA will have the provider's personal information entered. If it says "non-person", then it will enter the business information in box 33/loop 2010AA.
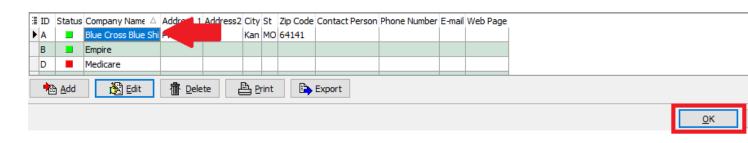

This will be the default setting for all insurance companies. If you have an insurance that is requiring you to bill as a business instead of individual provider, go to the same location shown above. Click on "Billing entity type". Once it is highlighted, click on "ADD" at the bottom of the window.
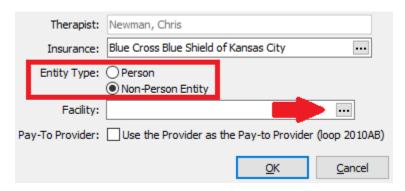
On the next Window, click the 3-dot ellipsis and chose the insurance company that you need to change to bill as a group.
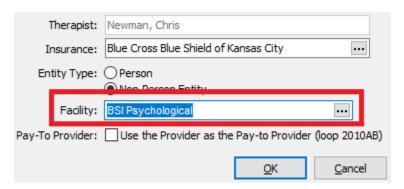

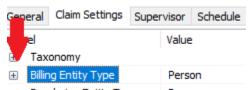Select the name of the insurance and then click "OK".

You will now be back to the settings for changing the billing entity type. The next step is to select "Non-Person" if you need to bill as group. If you are changing to bill as an individual select "Person". If you chose "Person", you are done, click on "OK". If you chose "Non-Person", select the facility you want to use to populate Box 33/Loop 2010AA. Select the 3-dot ellipsis to the right of "Facility". This will bring you to the facility library.

Highlight the name of the facility you wish to use for Box 33/Loop 2010AA. Click on "ok" and the window should be back the Billing Entity screen. The "Facility" box should now be filled in. Do not check the box for "Pay-To Provider". Finally, click on "OK".
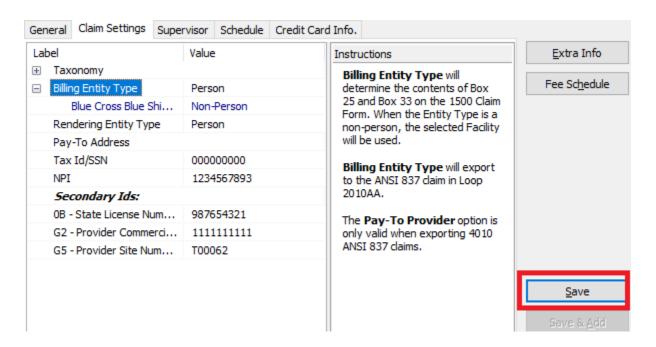

The Claim Settings tab window is now displayed. There is now a + symbol next to Billing Entity type.

When you click on the + symbol, you will see the override you added to bill using either Person or Non-person for Box 33/Loop 2010AA.

Now, on the bottom of the Window, click on "SAVE" to complete the change.

In this example, all insurances are set to submit as individual provider for box 33/Loop 2010AA. However, for Blue Cross Blue Shield, my claims will use the business (non-person) information for billing.