Helper & ClaimsConnect – Frequently Asked Questions

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Helper

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Installing HELPER on a new PC

How do I move Therapist Helper to a new PC?

After performing a backup of your most current Therapist Helper database (or retrieving your most recent one), you will need to download a link to Helper from the website and then add the data by restoring the backup file.

Go to http://support.helper.com/down/upgrade/ then select the download that matches your configuration type. Enter your account information and click Submit. You will get a link to a download to install Helper. Run the installation file and once installed you can restore your most recent backup file.

Adding Payer ID

Where do I add the Payer ID for an Insurance Company that I submit to electronically?

1. In Helper, go to **Setup > Libraries**, and select **Insurance Companies** from the left side. Select the appropriate Insurance Company from the list and click **Edit** button at the bottom.

2. On the **Billing tab**, approximately half way down the screen, you will see the **Payer Organization ID** field. Click the **ellipsis button (3 dots)** to the right. Scroll through the list of insurance companies (or start typing the name). Select the one you are looking for and press the **OK** button. This will populate the payor ID number in the Payor Organization ID field.

3. **Save** the screen and close the Insurance Companies Library.

Archiving/Inactivating a Therapist

How do I archive a Therapist?

To archive a *therapist,* you must make sure that the therapist's clients are inactive first or change the client to a different therapist.

1. To start, in Helper select the **Reports** button (top right), then select **Patient Lists** on the left. Choose **Patient phone book** and press the **Run** button at the bottom.

2. On the new window, click the **Select Group of Patients** button, then select the **Library Links** tab. Select the Therapist in the Therapist field by using the **ellipsis button (3 dots)** and click **OK** twice. Now run the report by pressing the **Preview** button. It will generate a list of clients.

3. Set the patients from the report to **inactive or change their therapist** in their facesheet:

   a. From the main Helper screen, **select the patient** from the list, then **Edit facesheet** button on the right. **Patient status** is listed at the bottom. **Save** your changes.

   b. To **change therapists**, on the **patient facesheet**, select the **Library Links** tab, then **update the Therapist**. **Save** your changes.

4. Once the client statuses are updated then go into **Setup > Libraries** and select **Therapists** (or Providers) on the left. Choose the therapist in question and click the **Edit** button at the bottom. In the lower right corner **change the status from active to inactive and save**. The provider has now been made inactive/archived.

Billing Taxonomy needs to be added to Electronic Claim (ClaimsConnect)

My claim is being rejected for missing the billing provider's taxonomy code.

Click the link for a short video on this subject: Taxonomy in ClaimsConnect

Day Sheet Report

A client requested a list of all the payments they made to me this year for their taxes. What is the best way to generate this list?

The easiest way to do this is by generating a day sheet report showing just patient payments and sorting it by month.

Click the link for a short video on this subject: Day Sheet Report Payments

Income Review Report

How can I get report to show my income for the year?

1. In Helper select the Reports button (top right), then under Summary Reports select Transaction Summary on the left (double click to expand).

2. Next, choose the report called Income review, then select the Run button. Enter the date range (remember to go one day past the date you wish to include). Then, select the Report Layout button to set the options you would like. Save and then run the report by clicking the Preview button.

Here is a video that helps illustrate how to run the Income Review Report: Income Review Report

Patient Bills

How do I print a patient bill?

Here is a video that explains how to print a Patient Bill: Printing Bills

Payment Tracking

How does Payment tracking work?

Click on the link for a short tutorial on Payment Tracking (short)

Here is a more detailed video: Payment Tracking (long)

Person – Non-Person

What is the difference between Person and Non-Person?

This is used to determine if you are identified with Insurance as an individual provider or as a business (if payment should be sent to you as an individual or to the business).

A **type 1 NPI** is assigned to an individual. If a provider is set up with a payer as an individual, then the billing entity type would be set to person in Helper. The provider's individual NPI is entered in the Claim Settings tab of the Provider.

1. In Helper, select **Setup > Libraries**, then choose **Therapists** (or Providers) on the left and select the **therapist name** and then the **Edit** button at the bottom.

2. On the **Claim Settings** tab, select **NPI**, then press the **Edit** button. In the NPI box, **enter the individual NPI**. **Save** your changes.

A **type 2 NPI** is assigned to a business. If a provider is set up with a payer as a business, then the billing entity type is set up as nonperson (business). The business NPI is entered in the Facility Claim Settings tab.

1. In Helper, select **Setup > Libraries**, then choose **Facilities** on the left. Select the **facility** and click the **Edit** button.

2. On the **Claim Settings** tab, select **NPI**, then press the **Edit** button. In the NPI box, **enter the business NPI**. **Save** your changes.

Here is a short video on how to set this up. Person vs. Non-Person

Range Check Error when sending a batch of claims

How do I correct a "Range Check Error" when submitting claims through ClaimsConnect?

1. Open ClaimsConnect. Click on the symbol (caret) before the Claims Folder on the left.

2. Select the **Unsubmitted** folder. Select the **first item** in the list and then press **Ctrl + A** to select all the items, then **right click** on any item and select **Archive**. **Confirm** that you want to archive the items. Once that is complete you can go back to Helper and submit claims.

To avoid receiving this error in the future, be sure to send no more than 40 dates of service per patient.

Referring Provider NPI

How do I fix a rejection for a missing referring provider NPI?

First, confirm that you need a referring provider.

If the referring provider is required:

1. Go to **Setup > Libraries > Referring Physicians**. Select the **provider** in question and click **Edit**.

2. Go to the **Claim Settings tab**, click on **NPI** and click the **edit** button at the bottom of the page to **add the NPI number**.

3. When finished, **save** out of the library.

If the referring provider is **not needed**, then edit the session:

1. Go to the **Other** tab and delete the referring Provider and **save** the session.
2. You will also need to **edit the client's facesheet/defaults**. Delete the referring provider.

Secondary Claims and Claim Adjustment Codes

How do I correct the Claim Balance rejection I am getting on a secondary claim?

You are likely are not applying the primary payment correctly. To correct the amounts not adding up correctly, watch this short video: Claim Adjustment Codes

For a more comprehensive review watch this video: How to Submit Secondary Claims Electronically

Tax ID # and NPI

How do I change or update my Tax ID or NPI # for claims I am submitting electronically?

1. You will need to complete and submit the change Tax ID form

2. Once we have confirmed the form has been processed, you can edit the therapist in the Therapist library:

    a. Go to the **Claim Setting** Tab and locate the fields for **NPI & Tax ID/SSN**
    b. Click on the field you want to update. Click the **edit** button at the bottom of the screen, make your edit, then click **OK**. When finished, **save** out of the Therapist library.

Taxonomy on HCFA 24I or 33B

How do I add a taxonomy code to a HCFA form?

If you are billing as a Person:

1. In Helper, select **Setup > Libraries**, then choose **Therapists** (or Providers) on the left and select the **therapist name** and then the **Edit** button at the bottom.
2. On the **Claim Settings** tab, select **Secondary IDs**, then press the **Add** button.
3. In the Window that opens, click the **down arrow** for the **Qualifier** and scroll down to **ZZ - Provider Taxonomy**
4. In the **Secondary ID** field enter the Taxonomy.
5. Click on the blue text **Edit Insurance Companies...** and **choose the insurance company** from the left side. Check the **appropriate box on the right** to add the taxonomy.

Click the link for a short video on this subject: Adding Taxonomy to a HCFA 1500 Form

Transaction or Patient List Sorting

How do I get my Patient List or Transaction Ledger back to the way I had it sorted?

Both can be sorted by clicking on the column title at the top of each column. For example, in the transaction ledger, if you click on DATE then it will sort by date. Each time you click on the title, it will reverse the sort order.

If the ledger is grouping everything together under a single column title, click the link for a short video on correcting this: Sorting the Transaction Ledger