

CATEGORY: CHARGES ~ TASK: Workers Compensation Case

Each state has unique requirements. We have flexibility to facilitate any combination necessary. Be sure the Policy and Case are setup correctly.

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How to add a Workers Compensation Policy

From Insurance Management add a new Policy > On the Add/Modify Policy screen
Many groups use the effective date as the injury date.

1. Insured ID > use Policy field, in some states this is SSN or 999999999 (HCFA box 1a)
2. **Workers Comp Claim Number** > use Group Field (HCFA box 11) - the unique character number generated by Workers Compensation
3. Group name (HCFA box 11c)
4. If Relationship Self (18) *skip* 4/5 step: if Relationship Employer 20 > Employer (HCFA box 4)
5. Address (HCFA box 7)

★ we use HCFA as a visual example, fields are on the corresponding ANSI, electronic forms as well

The screenshot shows the 'Add/Modify Policy' form for Patient: 2030104 Name: PINCHOI, BRADLEY. The form is divided into several sections with numbered callouts (1-5) and labels for HCFA boxes (1a, 11, 11c, 7). A green arrow points from the 'Group' field to the 'INSURED'S POLICY GROUP' field in the HCFA form on the right.

Field	Value	Callout	HCFA Box
Policy	999999999	1	1a
Group	WORKERS CLAIM #	2	11
Group Name		3	11c
Insured Relationship	20 EMPLOYEE	4	11
Address	17019 SEDGWICK SWA 14573 - PO BOX 14573 LEXINGTON KY 405...	5	7

HCFA Form Fields:

- 1a. INSURED'S I.D. NUMBER: 999999999 (1)
- 4. INSURED'S NAME (Last Name, First Name): EMPLOYER, TEST (4)
- 7. INSURED'S ADDRESS (No., Street): 123 MAIN ST (5)
- 29 PALMS (5)
- ZIP CODE: 92278 (5)
- 11. INSURED'S POLICY GROUP (ANSI Code): WORKERS CLAIM # (2)
- 3. INSURANCE PLAN NAME OR PROGRAM (3)

CASES - Workers Comp

'Cases' allow specific information for repeated charges, appointments, per patient. Best Practice: Commercial Insurance profile is 'Default', allowing us to choose Insurance for this episode of care via the Case.

Insurance Profile for Workers Comp should be added first if possible.

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Case

Click CASES on Patient / Encounter Dashboard, or Appointment > [Add]

Cases [1]

1. Type Dropdown > Choose 'Workers Comp'
2. 'Description' displays on charge/scheduling. We suggest this format: Date of Injury (DOI), side, location ie. '12/13/17 left ankle'
3. Checkbox > **Default** - 'Most likely' to be used for a new Appointment or Charge. Groups using a lot of cases keep this field blank
 - o **Active**- allows the use of this case - uncheck if this case is expired or no longer needed

4. 'Insurance profile' > choose the Profile with the Worker Comp policy - *If the policy is not yet keyed in see above for details, then return to the case to add*
5. Case - field is grayed out until the case is saved and a number is assigned
6. **this may not be required in your state*

If Injury or Illness Cause is required > Illness [L] - 431- sends onset date Injury [I] 454- sends INITIAL treatment date

7. Click [Accident] **required* > DOI, Cause, State > [Save]
 - o only one Cause is generally needed
8. You may key in an assigned DX code
 - o Usually left blank when the charge originates in the EMR

Authorization

> Click 'Add Authorization' *if needed*



- Trigger Authorization Alerts for Scheduling and Charge Entry: Effective/Expiration
of Visits, Dollars, Days Units, CPT
- 'Authorizer' is a free form field - you may prefer to use 'Contact' after you save the Case to add Case Manager information

Other Field > To access Click the plus sign

- a) Employer *
- b) Body Side dropdown - Right, Left, Bilateral, None/Other*
- c) Body Part - choose from the lookup*
 - o *informational only- not used on claims
- d) Manually key in the 'WC Claim ID' - the unique character number generated by Workers Compensation
 - > We populate Y4 when this field is filled out

b. OTHER CLAIM ID (Designated by NUCC)
Y4 : BOX11B

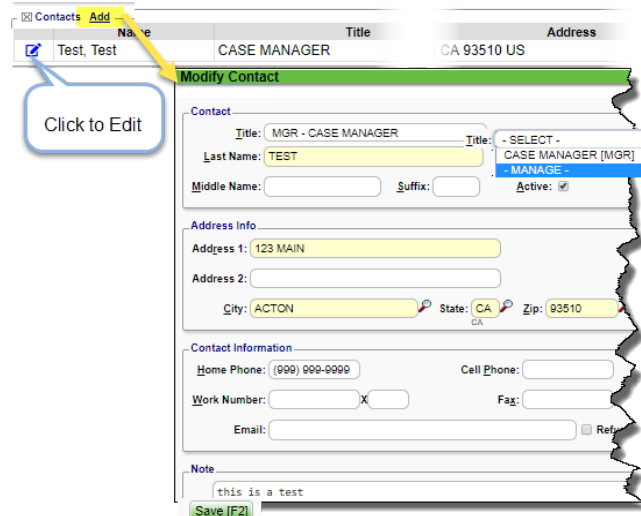
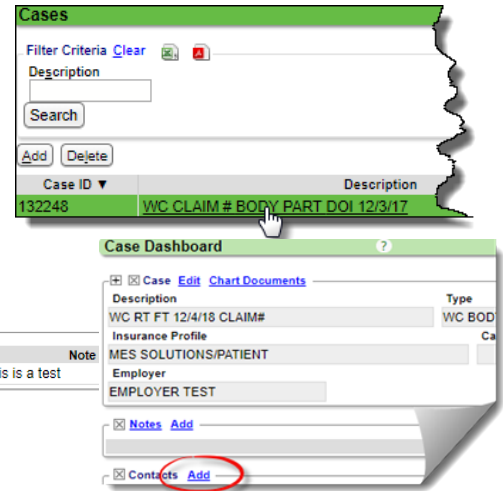
[SAVE] the Case

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Contacts

Once the Case is saved you may Add/Edit 'Contacts' on the Case Dashboard

To Edit > Go the Cases page> Click the Description hyperlink



Condition code

If a condition code is needed on HCFA Box 10D Encounter Dashboard > Click 'HCFA Fields' link

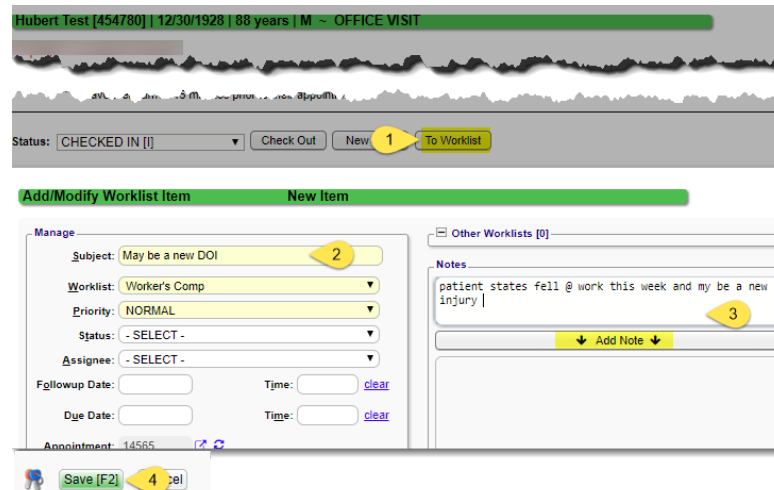
- Look for box 10
- Enter the code needed
- [Save]



How can I use appointment worklist

On the appointment page

1. Click [to worklist]
2. Add Subject, Assignee etc
3. Add a note > Click 'Add Note'
4. [Save]



Related Help Center content

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- Insurance Management
- Cases and Authorizations
- Post Charge
- Claims Batch Creation