

## Regina Parham - Horizon

---

**From:** Horizon Support [support@HorizonHealthware.com]  
**Sent:** Tuesday, March 31, 2009 11:41 AM  
**To:** Horizon Support  
**Subject:** NC Medicaid Billing - NPI & Taxonomy - PROMISE is Ready but YOU must "flip the switch"!

### Reminder!!

PROMISE has been fully NPI-ready since May 2008 - BUT - each provider must decide when they want to make the switch and must then take a few simple steps locally to complete the process. Please see below a repeat transmission of our suggestions for how and when to do this. Note that we've added (in blue) a few items that were perhaps obvious, but we failed to mention them the first time and want to leave nothing assumed!

Horizon Tech Support  
[support@horizonhealthware.com](mailto:support@horizonhealthware.com)  
 (919) 676-8090 ext. 0

---

**From:** Horizon Support [mailto:support@HorizonHealthware.com]  
**Sent:** Wednesday, March 11, 2009 5:57 PM  
**Subject:** NC Medicaid May 1 NPI-only - Action required by YOU!!

Attention providers who bill NC Medicaid:

The final phase of NPI for NC Medicaid providers is nearly here, and we're writing to remind you that PROMISE users have had the capability since May of last year (the original NPI deadline) to send NPI-only claims. **You may have received reminders from the home care association or from EDS about the May 1, 2009 deadline for switching to "NPI-only" claims - and a few have called Horizon to confirm that the PROMISE system is ready to handle that change. The answer is YES!!**

We strongly recommend that you send a couple of test claims for each of your "old" provider numbers (i.e. PCS and CAP) with the Legacy info turned off, so you can be certain your codes are set up properly and that there will be no disruption in billing when the NPI-only requirement takes effect. You can do that anytime between now and May 1, the sooner the better, so if there are problems we can work together to resolve them prior to the final deadline. You do not need anything new from Horizon in order to do this - you just need to take a few simple steps in PROMISE.

The information and instructions regarding NPI final phase are repeated below (with minor editing revisions) from the Horizon PROMISE release 3.3 and 3.3.2 documents:

## Billing – NPI final phase

- The final phase of the HIPAA transaction implementation, which relates to universal identifiers, requires that effective May 23, 2008 all electronic claims must contain a National Provider ID (NPI) and Taxonomy code for most of the entities that are reported on the claim. (NC Medicaid extended this to May 1, 2009)
- Agency, attending physician, and rendering personnel all require both NPI and Taxonomy.
- So-called “legacy” identifiers (UPIN number, Pin number, Provider Number) are not to be included on

claims after implementation of the final NPI phase, and claims are to be transmitted “NPI-only”.

- It is rumored that some payors may not be able to process NPI-only claims on May 23, 2008 but will continue to require a legacy provider number for correct processing and payment of claims. (This turned out to be true for EDS/Medicaid in NC)
- As we did with Taxonomy, Horizon has given each agency the capability of controlling when PROMISE stops including the Legacy Provider information on claims. The EDI Configuration screen includes a checkbox for users to choose whether to send/not send the Legacy Provider information. The default was set to checked, which means that the legacy information will be sent as a part of the electronic claim, as has been the case all along.
- To submit NPI-only claims as a test or when the intermediary switches to fully NPI-compliant claim submission, you should un-check the box “Send Legacy Info” for that intermediary. To get to the EDI Configuration screen...  
Promise users: Use the menu at the top of any screen to open: Data tables, Agency, Configuration, EDI, then choose the receiver/intermediary from the drop down list.

EDI-Only Users: From the first screen after logging in to your Horizon software, click the EDI Configuration button, then choose the receiver/intermediary from the drop down list.

- Note that each intermediary is handled separately and you can switch the legacy information on and off as needed, such as “off” to send a test batch and back “on” if the intermediary has a problem processing the claims with NPI and you want to revert to legacy provider number while the problem is resolved. For each of your agency’s intermediary/receiver accounts, you will need to verify and/or change the settings in the PROMISE EDI configuration to assure that the electronic claims and eligibility requests are formatted correctly to match what is required.

Please note that the legacy provider number will still show up on the screen when you edit an electronic claim, even after you switch to NPI-only billing. We are still storing the information locally in your database, but won’t send it in the formatted file if you have “unchecked” the Legacy info checkbox in EDI Configuration.

### **Actions you must take to test and/or implement final NPI:**

- [Get your NPI number and report or verify it with NC DMA. See NC Medicaid info and instructions at http://www.dhhs.state.nc.us/dma/basicmed/Section11.pdf](http://www.dhhs.state.nc.us/dma/basicmed/Section11.pdf)
- Be sure that you have entered the agency's correct NPI number(s) [and Taxonomy Code\(s\)](#) in either the Agency Configuration or Payor screens as appropriate. If you have one and only one NPI, it goes in Configuration; [same with Taxonomy](#). See the instructions on the Configuration and Payor screens for guidance, [and see the Medicaid instructions at http://www.dhhs.state.nc.us/dma/basicmed/Section11.pdf](#) for how to determine your provider type's Taxonomy Code.
- Confirm that you have correctly typed the agency's ZIP +4 for your address that is on file with NC Medicaid; check the main Configuration screen as well as the Branch Office screen, and key ZIP +4 for as many offices as are set up in your PROMISE system.
- Be sure that you have typed the correct NPI number in the Personnel screen for

each physician and/or rendering provider. If you've not been running the "Verify Admissions and Transactions" report before each billing cycle, run it now to identify any missing NPI numbers.

- Go into the EDI Configuration screen and select each *Medicaid* intermediary from the drop down list and **un-check** the "Include in transmission: Legacy info", then click save ...but leave the taxonomy code checked "on". According to our correspondence with North Carolina Medicaid, they do want the taxonomy code.
- Send a small batch of 2 or 3 claims - be sure to note whose claims and the service dates, so you can look for them on the next checkwrite's RA.
- If doing this in advance of April 30 just as a test, go back into the EDI Configuration screen and turn the Legacy field back on for each Medicaid receiver.
- Once you see the test claims paid on a subsequent RA - or at the latest, after 5:00 on April 30 and before your next transmission - be sure to change the Legacy setting in EDI Configuration to un-checked to finalize your implementation of NPI-only claims.

Feel free to contact us if you have any questions.

Horizon Technical Support  
(919) 676-8090 extension 0  
[support@horizonhealthware.com](mailto:support@horizonhealthware.com)