

## Primary third-party medical insurance

The Primary third-party medical insurance page displays the medical insurance payers used in your health center's source system (often your EHR) and allows you to group them into categories.

A primary third-party payer refers to an entity that pays for health care services on behalf of patients, with a focus on insurance companies or government programs that cover a significant portion of patient costs. The purpose of this admin settings page is to identify the correct third-party primary payers for each medical insurance listed from your source system for accurate reporting for UDS Table 4. Updates to these mappings are reflected in a draft file after the next data refresh from the EHR.

Unlike the VisReporting product line, this mapping must be done in Saber Analytics. Saber Analytics does not look at source system values or mappings used for VisReporting.

It displays the following information:

- **Payer name:** refers to the insurance payer's name from the health center's source system.
- **Address:** refers to the insurance payer's address as listed in the health center's source system.
- **Grouping name:** refers to the name of the category that the insurance payer is mapped to currently.
- **Modified by:** refers to the last user who changed the patient exclusion. It will show "System\_ETL" if it's never been edited.
- **Modified on:** refers to when the last user changed the patient exclusion. It will show "System\_ETL" if it's never been edited.
- **Source system status:** either active or inactive

To access:

1. Navigate to **Admin settings**.
2. Click the **Value set mappings** in the navigation menu.
3. Click **Primary third-party medical insurance**.
4. This opens the Primary third-party medical insurance page.

## Value set mappings

### Primary third-party medical insurance See history

A primary third-party payer refers to an entity that pays for health care services on behalf of patients, with a focus on insurance companies or government programs that cover a significant portion of patient costs. Use the section below to identify the correct third-party primary payers for each medical insurance listed from your source system for UDS Table 4. Updates to these mappings reflect in a draft file after the next data refresh from the EHR.

Search by payer name or grouping name

Show 25 entries Manage columns  Uncategorized  Active only

<input type="checkbox"/>	Payer name	Address	Grouping name	Modified by	Modified on	Source system status
<input type="checkbox"/>	Aarp United Medicare Preferred	PO Box 740819 Atlanta GA	Medicare	Catherine Pompei	12/09/2024, 12:23 PM	Active
<input type="checkbox"/>	Administrative Concepts Inc Continental Care	994 Old Eagle School Road Suite 1005 Wayne PA	Medicaid (Title XIX)	Tia Shaw	10/03/2024, 7:27 AM	Active
<input type="checkbox"/>	Aetna Hc	POBox 14089 Lexington KY	Medicare	Tom Brawley	12/09/2024, 12:09 PM	Active
<input type="checkbox"/>	Aetna Medicare	PO Box 14089 Lexington KY	Dually Eligible (Medicare and Medicaid)	Tia Shaw	10/03/2024, 7:28 AM	Active
<input type="checkbox"/>	All Savers	3100 AMS Boulevard PO, Box 19032 Greenbay WI	Dually Eligible (Medicare and Medicaid)	Tia Shaw	10/03/2024, 7:28 AM	Active
<input type="checkbox"/>	Allied Benefit Systems Llc	PO Box 90978660690	Dually Eligible (Medicare and Medicaid)	Tia Shaw	10/03/2024, 7:28 AM	Active
<input type="checkbox"/>	Always Health Partners	PO Box 852099 Richardson TX	Medicare	Tom Brawley	12/09/2024, 11:52 AM	Active
<input type="checkbox"/>	Am Better Bh	PO Box 5010 Farmington MO	None/Uninsured	Tom Brawley	12/09/2024, 11:54 AM	Active

Showing 1 to 25 of 159 entries < Prev 1 2 3 4 Next >

The **See history** link goes to the **Admin changes** audit log. Use this to view any changes to **Primary third-party medical insurance**.

Use the **Active only** toggle to view the “Inactive” third-party medical insurance(s).

### **Add to group**

The Primary third-party medical insurance feature allows users to group into categories their medical insurance.

The feature lets you add multiple insurance payers to a group or a single insurance payer to a group at one time.

Steps to add one insurance payer:

1. Click the **Primary third-party medical insurance**.
2. Use **Search by** or click the **Uncategorized toggle** and locate the medical insurance(s).
3. Click the **Add to group link**. This opens the grouping modal.

For this example, we will add a grouping category for the Aarp United Medicare Preferred insurance payer.

<input type="radio"/>	Payer name ↑	Address	Grouping name	Modified by	Modified on	Source system status
<input type="radio"/>	Anthem Medicare Advantage Primary	PO Box 533 North Haven CT	Add to group			Active
<input type="radio"/>	Assured Benefits Administrators	PO Box 211517 Eagan MN	Add to group			Active
<input type="radio"/>	Avmed	PO Box 569000 Miami FL	Add to group			Active

4. Click the **drop-down menu arrow** to view the grouping categories.
5. Click to select the grouping.

For this example, the Medicare insurance grouping is selected.

**Anthem Medicare Advantage Primary** ×

Select a grouping below or click the trash can to remove current grouping

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- 7- None/Uninsured
- 8a- Medicaid (Title XIX)
- 8b- CHIP Medicaid
- 9a- Dually Eligible (Medicare and Medicaid)
- 9- Medicare ↙
- 10a- Other Public Insurance (Non-CHIP)
- 10b- Other Public Insurance CHIP
- 11- Private Insurance

6. Click **Save**.

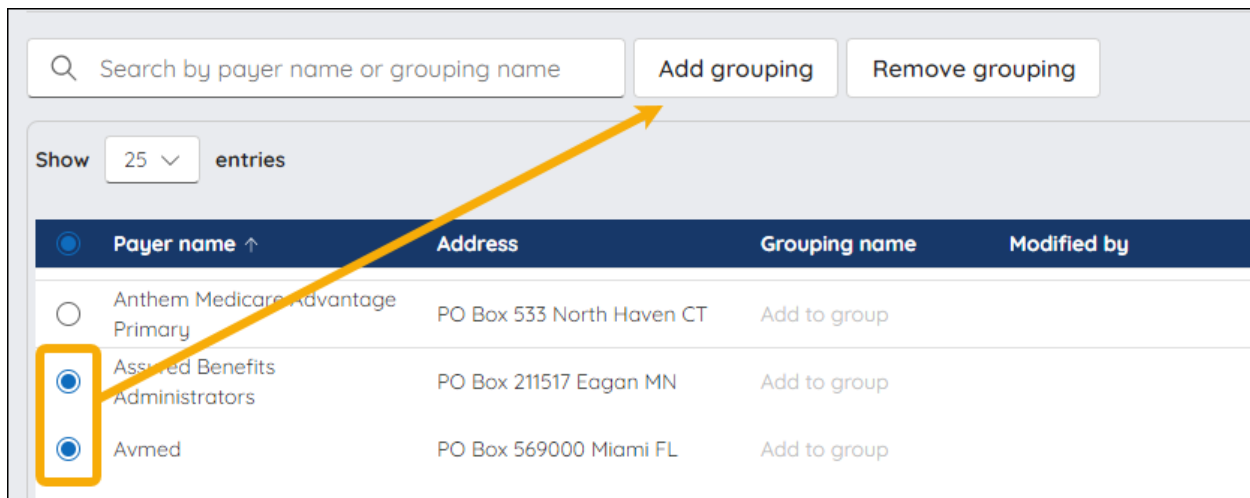
The Primary third-party medical insurance is now displayed in the list with the grouping category.

Steps to add multiple insurance payers:

1. Click the **Primary third-party medical insurance**.

2. Use **Search by** or click the **Uncategorized toggle** and locate the medical insurance(s).
3. Click the **radio buttons** to select the third-party medical insurances.
4. Click the **Add grouping** button. This opens Edit groupings.
  - **Important Note:** The Add grouping button does not become active until the radio button is selected.

For this example, two commercial medical insurance payers are selected.

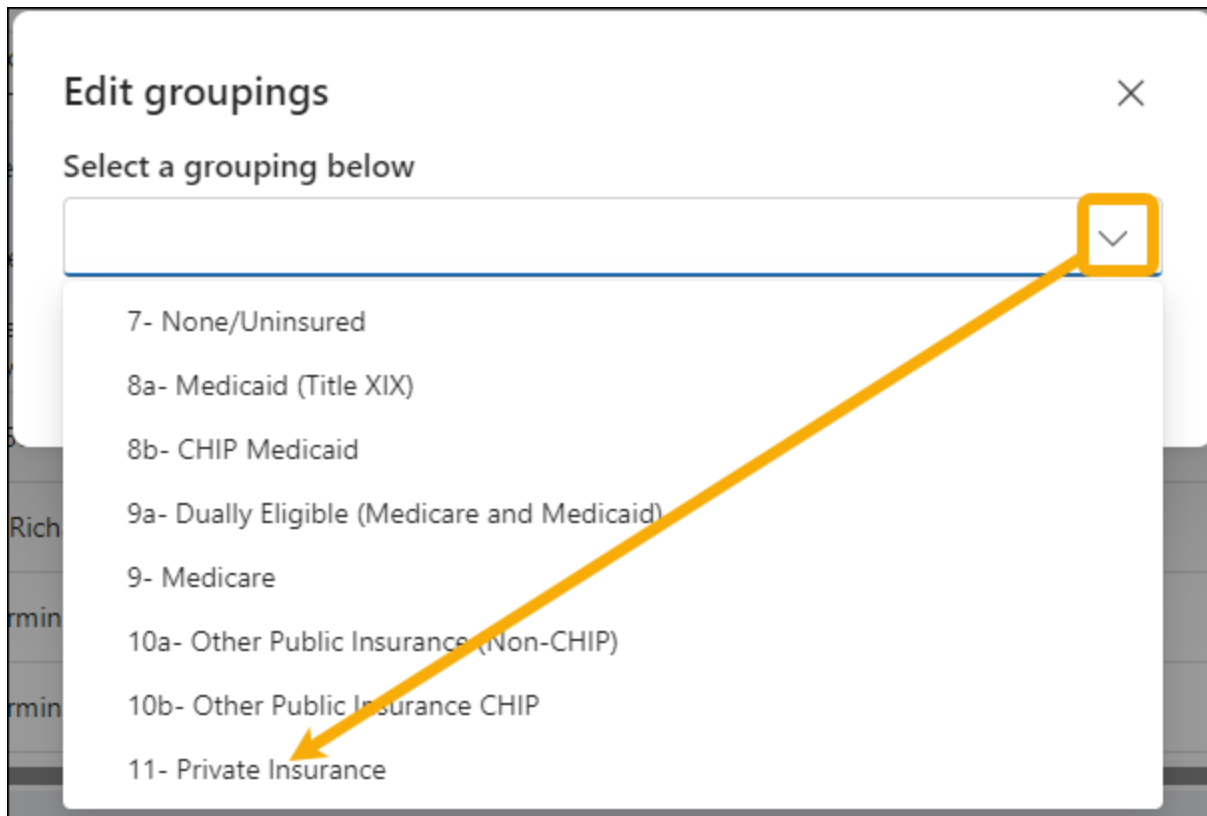


The screenshot shows a web interface with a search bar at the top containing the text "Search by payer name or grouping name". To the right of the search bar are two buttons: "Add grouping" and "Remove grouping". Below the search bar is a "Show" dropdown menu set to "25" entries. A table with four columns is displayed: "Payer name", "Address", "Grouping name", and "Modified by". The table contains three rows of data. The first row is "Anthem Medicare Advantage Primary" with address "PO Box 533 North Haven CT" and "Add to group" as the grouping name. The second row is "Assured Benefits Administrators" with address "PO Box 211517 Eagan MN" and "Add to group" as the grouping name. The third row is "Avmed" with address "PO Box 569000 Miami FL" and "Add to group" as the grouping name. A yellow arrow points from the "Add grouping" button to the radio button for "Assured Benefits Administrators". A yellow box highlights the radio buttons for "Assured Benefits Administrators" and "Avmed".

<input checked="" type="radio"/>	Payer name ↑	Address	Grouping name	Modified by
<input type="radio"/>	Anthem Medicare Advantage Primary	PO Box 533 North Haven CT	Add to group	
<input checked="" type="radio"/>	Assured Benefits Administrators	PO Box 211517 Eagan MN	Add to group	
<input checked="" type="radio"/>	Avmed	PO Box 569000 Miami FL	Add to group	

5. Click the **drop-down menu arrow** to view the grouping categories.
6. Click to select the grouping.

For this example, the Private Insurance grouping category is selected.



7. Click **Save**.

The Primary third-party medical insurances are now displayed in the list with the Private Insurance grouping category.

### ***Editing a Primary third-party medical insurance grouping***

The **Primary third-party medical insurance** feature enables users to change or remove a grouping category.

Steps to edit a grouping:

1. Navigate to the **Admin settings** page.
2. Click **Value set mapping** in the navigation menu and click **Primary third-party medical insurance**.
3. Use the **Search by** and locate the insurance to modify.
4. Click the **Grouping name hyperlink**. This opens Edit groupings.
5. Click the **trash can icon**.

**Note:** This clears the associated grouping for the insurance payer.

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Select a grouping below or click the trash can to remove current grouping

10a- Other Public Insurance (Non-CHIP) ▼ 🗑️

Grouping name: **Other Public Insurance (Non-CHIP)**

**Save**

6. Use the **drop-down menu arrow** to select a new grouping category. For more information, refer to [Add to group](#).

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Select a grouping below or click the trash can to remove current grouping

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- 7- None/Uninsured
- 8a- Medicaid (Title XIX)
- 8b- CHIP Medicaid
- 9a- Dually Eligible (Medicare and Medicaid)
- 9- Medicare
- 10a- Other Public Insurance (Non-CHIP)
- 10b- Other Public Insurance CHIP
- 11- Private Insurance

7. Click **Save**.

The Primary third-party medical insurance now displays with the changed grouping category.

### ***Uncategorized only***

The Primary third-party medical insurance feature has an **Uncategorized only** toggle. Use the **Uncategorized toggle** to display third-party medical insurances that are not mapped or associated.