

Insurance Master File (IMF)
IMF Plan Code Selection Matrix – What to look for on the IMF screen

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TYPE OF INSURANCE	IMF Screen Columns				LOOK-UP METHOD
	PAYOR	NETWORK/INS CO	NTWK	TYPE	
Indemnity*	Name of Insurance	Name of Insurance or Private Insurance	IND	N/A	Address
PPO with Internal Network*	Name of Insurance or Name of Employer/Union if Self-Funded	Name of Insurance	PPO	N/A	Address
PPO with External Network*	Name of Insurance or Name of Employer/Union if Self-Funded	Name of Network	PPO	N/A	Address
HMO Plans with Medical Groups <u>Most HMO Plans</u>	Name of Primary Medical Group	Name of Insurance	IPA or IPO	M if Medi-Cal Risk MC if Medicare Risk	Medical Group
HMO Plans without Medical Groups <u>Kaiser HMO</u>	Name of Insurance	Name of Insurance	HMO	M if Medi-Cal Risk MC if Medicare Risk	Address
POS PMG is B&T Tier 1	Brown & Toland	Name of Insurance	PS1 or IPS	N/A	Medical Group
POS PMG is B&T Tier 2	Brown & Toland	Name of Insurance	PS2 or IPS	N/A	Medical Group
POS PMG is not B&T Tier 1	Name of Primary Medical Group	Name of Insurance	PS1 or IPS	N/A	Medical Group
POS PMG is not B&T Tier 2 or Tier 3	Name of Insurance	Name of Insurance or Name of Network	PS2 Or PS3	N/A	Address
EPO with Internal Network	Name of Insurance	Name of Insurance	EPO	N/A	Address
EPO with External Network	Name of Insurance	Name of Network	EPO	N/A	Address
Workers' Comp with Internal Network	Name of Insurance or Name of Employer/Union if Self-Funded	Name of Insurance	PPO or IND	WC	Address
Workers' Comp with External Network	Name of Insurance or Name of Employer/Union if self-funded	Name of Network	PPO or IND	WC	Address

***EXCEPTION:** For all Out-of-State indemnity and PPO plans administered by Blue Cross and/or Blue Shield, use the "Search BX Policy Num" field to search for the IMF code.

IMPORTANT!	IMPORTANT!	IMPORTANT!
You must always choose an IMF Plan Code that states " <u>Professional Claims Only</u> " or " <u>Hosp + Prof Claims</u> " in the Comments field.		

IMF Plan Code Selection Matrix – What to look for on the IMF screen

TYPE OF INSURANCE	IMF Screen Columns				LOOK-UP METHOD
	PAYOR	NETWORK/INS CO	NTWK	TYPE	
Medicare Standard	Medicare	Medicare	GOV	N/A	Government (Medicare)
Medi-Cal Standard	Medi-Cal	Medi-Cal	GOV	N/A	Government (Medi-Cal)
Medi-Cal Managed Care (2 Plan Model)	Name of Primary Medical Group	Insurance Company	IPA or IPO	M	Medical Group
Medi-Cal Managed Care (COHS)	Insurance Company	Insurance Company	HMO or GOV	M	Government (Medi-Cal Risk HMO)
CCS	CCS & County	CCS – CA Children’s Svcs	GOV	N/A	Government (CCS)
CCS/Medi-Cal Crossover	CCS & County/M-Cal	CCS/Medi-Cal	GOV	N/A	Government (CCS/M-Cal)
GHPP	GHPP	GHPP	GOV	N/A	Government (GHPP)
MIA	MIA & County	MIA	GOV	N/A	Government (MIA)
CMSP	CMSP	CMSP	GOV	N/A	Government (CMSP)
TRICARE	TRICARE For Life & Region	TRICARE For Life & Region	CHR	N/A	Government

ZZ Code Selection

The following table lists and describes which ZZ Code to use for each type of insurance

ZZ Code	Use for . . .
ZZ1	Indemnity, PPO, POS Tier 2 and Tier 3
ZZ2	HMO, POS Tier 1, EPO, Medi-Cal Managed Care, Medicare Risk HMO
ZZ3	Workers’ Compensation

IMPORTANT!	IMPORTANT!	IMPORTANT!
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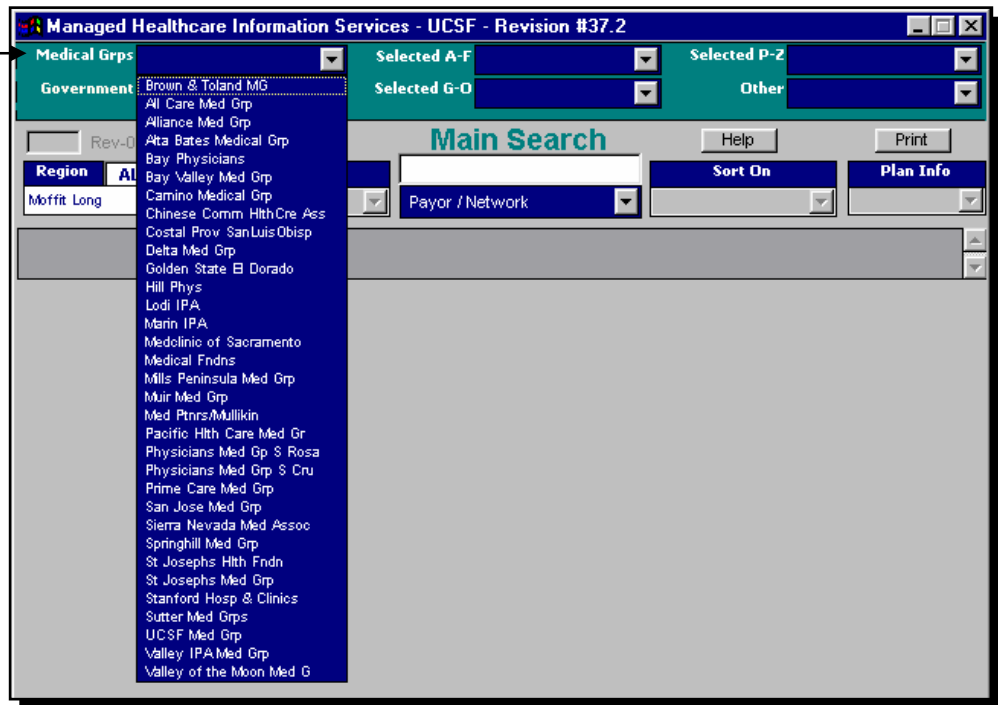
Always notify the IMF Department every time you enter a “ZZ” Code in the IDX system
The IMF Help telephone number is **353-4850** and the email address is **HELP.IMF@UCSFMEDCTR.ORG**

IMF Look-ups

Method 1 - Medical Group

Medical Group – HMOs and POS Tier 1 associated with a medical group, Medicare HMO Risk Plans, Managed Medi-Cal (Two Plan model), Brown and Toland POS Tier 2	
1.	Determine: a) Name of the medical group. Example: Brown and Toland b) Name of the insurance company. Example: Health Net
2.	Use: a) The Medical Group Quick Access Menu
3.	Choose: a) The Medical Group that matches the patient's insurance
4.	Use: a) SORT ON button to reorder by Network/Ins Company
5.	Select a code that matches: a) Medical Group b) Insurance company name c) Type of insurance (HMO, POS Tier 1) d) Medicare or Medi-Cal Risk, if appropriate
Note: <i>If you are unable to locate an appropriate match, refer to the selecting "Z" Codes rules on pages 7 and 8.</i>	

Method 1
Medical Group
Look-up Method



IMF Look-ups

Method 2 - Address

Address – Indemnity, PPO, EPO, Workers' Compensation, Staff Model HMOs, TRICARE, and POS Tier 2 and Tier 3	
1.	Determine: a) Name of the insurance company. Example: Blue Cross b) Name of the appropriate network, if appropriate. Example: BPS, CCN c) Claims mailing address. Example: Pro-Fee or Hospital plus Pro-Fee
2.	Use: The Main Search category. Use the PO Box or Street Address search choices
3.	Choose the SORT ON button to reorder by Network/Ins Company
4.	Select a code that matches: a) Claims mailing address b) Insurance company name c) Network name, if applicable d) Type of insurance (PPO, EPO) e) Workers' Compensation, if appropriate
Note: If you are unable to locate an appropriate match, refer to the selecting "Z" Codes rules on pages 7 and 8.	

**Method 2
Address
Look-up Method**

Managed Healthcare Information Services - UCSF - Revision #37.2

Medical Grps: [Dropdown] Selected A-F: [Dropdown] Selected P-Z: [Dropdown]
 Government: [Dropdown] Selected G-O: [Dropdown] Other: [Dropdown]

15 Rev-0037.2 Active Only **Main Search** Help Print

Region: ALL Select Only: 1000 Sort On: Address Plan Info: Address
 Moffit Long: [Dropdown] ALL: [Dropdown] PO Box: [Dropdown] Address: [Dropdown] Address: [Dropdown]

Hosp & Prof Claims Only

IDX Plan	IDX Fsc	Pagor	SMS Plan	SMS FC	Network / Ins Co	Ntwk Type	Address	City
MDH	127	Kanawha Ins	413	H	Beech Street	PPD	PO Box 1000	Lancaster
2B0D	127	Kanawha Ins	455	H	Multiplan	PPD	PO Box 1000	Lancaster
T8E	127	Kanawha Ins	728	H	Private Healthcare Sys	PPD	PO Box 1000	Lancaster
2P6R	127	Nations Health Plan	126	H	PPD Next	PPD	PO Box 1000	Lancaster
SD2	127	Nations Health Plan	485	H	Preferred Health Network	PPD	PO Box 1000	Lancaster
D3H	127	Unicare Ins Co	413	H	Beech Street	PPD	PO Box 100008	Decatur
RBT	101	United Furniture Wrks	G01	G	Private Insurance	IND	PO Box 100037	Nashville

Ben Pkg Emp **Authorization** Claims

IDX Plan	Pagor	SMS Plan	Network / Ins Co
MDH	Kanawha Ins	413	Beech Street

Admin: No Agent SMS Name: Beech Street
 Addr: PO Box 1000 Lancaster, SC 29721 1000 Ref No: 19290

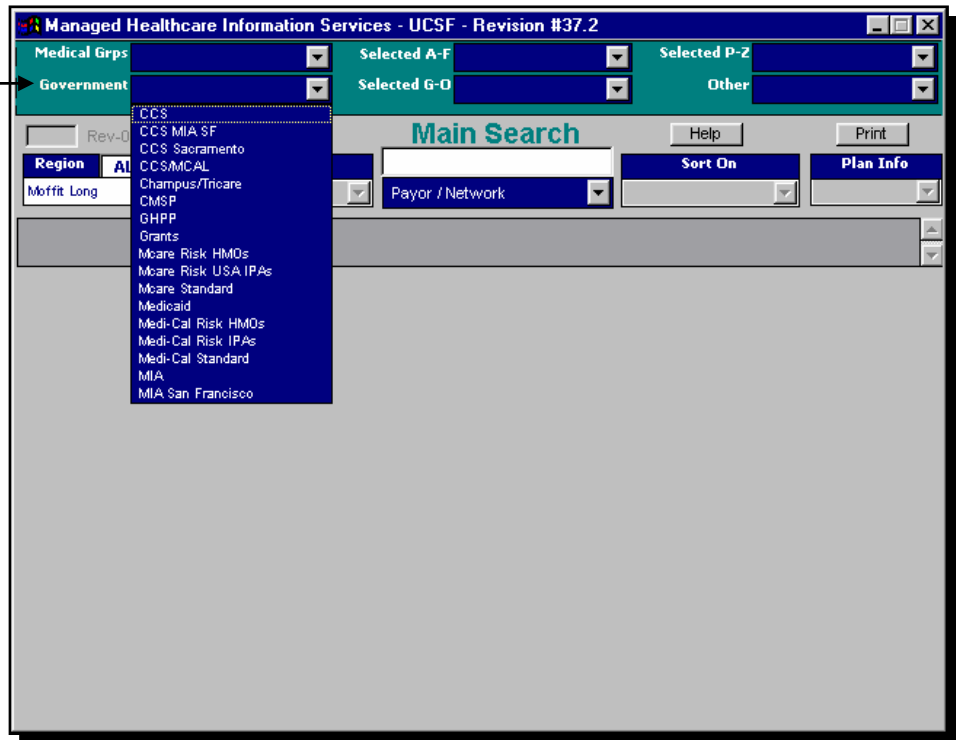
MDH Claims: (803) 286-2440 0000 Contract: X Plan Type: Health State Code: 2 Code9: BECHKAMA
 UR: (803) 286-2440 0000 Idx Fsc: 127 Sms Fc: H Knox Code: 0000 Created: 11-17-1995
 Adt: A270 Mpac Fc: H Hosp Neic: 57038 Reviewed: 01-16-2002
 Ims Code: Med Neic: 57038
 Cmmts:

IMF Look-ups

Method 3 – Federal/State Government

Government – Government Look-ups- Standard Medicare, Standard Medi-Cal Medicaid, Medi-Cal Managed Care (COHS), CMSP and GHPP	
1.	Determine: a) Type of government insurance
2.	Use: a) The Government Quick Access Menu
3.	Select: a) An insurance that matches the patient’s insurance type: <ul style="list-style-type: none"> • Medicare A and B, A only and B only (if patient only has Medicare Part A and the visit is outpatient, you MUST attach a separate insurance plan code) • Medicare B only • Standard Medi-Cal • Managed Medi-Cal COHS (Medi-Cal Risk HMO) • CMSP • GHPP

Method 3
Federal/State Government
Look-up Method



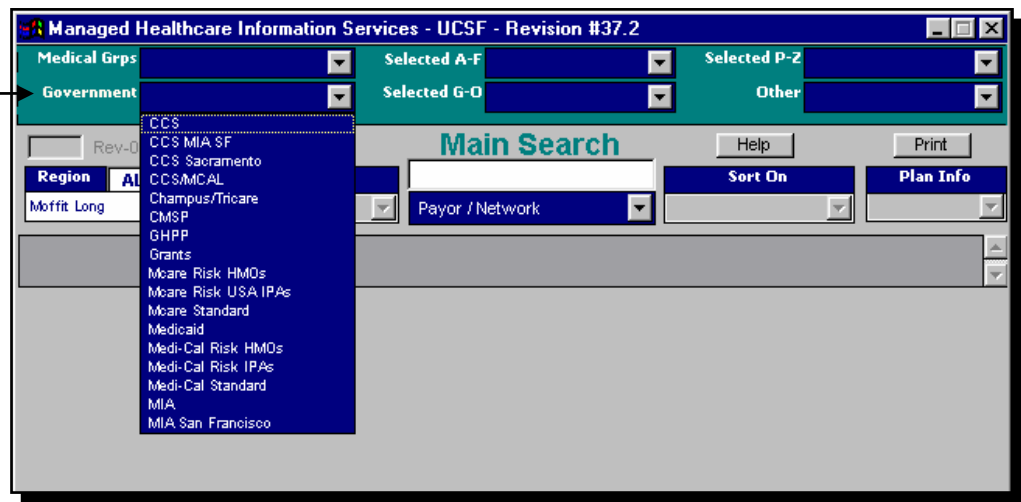
IMF Look-ups

Method 3 – County Government (County Specific)

County –	County Look-ups-California Children’s Services (CCS), Medi-Cal Standard/CCS, and Medically Indigent Adult (MIA)		
1.	<p>Determine:</p> <p>a) Type of insurance (CCS/ Medi-Cal/CCS, and MIA) b) Location of county (patient’s county of residence referred to on the insurance card)</p>		
<p><u>Important Notes:</u></p> <table style="width: 100%;"> <tr> <td style="width: 35%; vertical-align: top;"> <p>CCS and Medi-Cal Fee for Service –</p> <p>CCS and Medi-Cal Managed Care –</p> </td> <td style="vertical-align: top;"> <ul style="list-style-type: none"> ▪ All claims are first sent to CCS, but Medi-Cal Fee for Service pays as primary ▪ Use the CCS/Medi-Cal Crossover IMF Code ▪ IDX cannot accommodate a combined CCS and Medi-Cal Managed Care code. Each insurance must be loaded separately. All claims are first sent to CCS, but Medi-Cal Managed Care pays as primary. ▪ Enter the CCS/Medi-Cal Crossover as the primary IMF Code ▪ Enter the Managed Medi-Cal as secondary IMF Code </td> </tr> </table>		<p>CCS and Medi-Cal Fee for Service –</p> <p>CCS and Medi-Cal Managed Care –</p>	<ul style="list-style-type: none"> ▪ All claims are first sent to CCS, but Medi-Cal Fee for Service pays as primary ▪ Use the CCS/Medi-Cal Crossover IMF Code ▪ IDX cannot accommodate a combined CCS and Medi-Cal Managed Care code. Each insurance must be loaded separately. All claims are first sent to CCS, but Medi-Cal Managed Care pays as primary. ▪ Enter the CCS/Medi-Cal Crossover as the primary IMF Code ▪ Enter the Managed Medi-Cal as secondary IMF Code
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2.	<p>Select:</p> <p>The insurance that matches:</p> <p>a) Insurance type (CCS, Medi-Cal/CCS, or MIA) b) The patient’s county of residence</p>		

Method 3
County Government Look-up Method
For County:

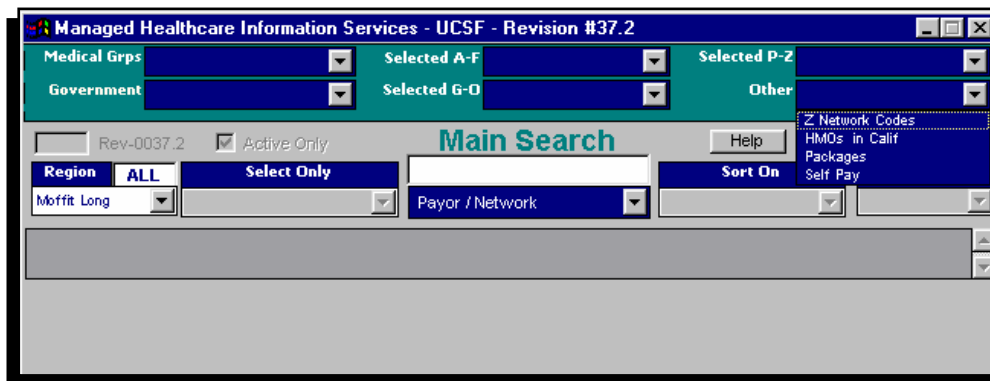
- CCS
- CCS/Medi-Cal
- MIA



IMF Look-ups

Z Codes

Z Code Policy-Miscellaneous IMF Codes	
❖	These codes should only be used when you are unable to find a match using one of the four look-up methods detailed on pages 3-6 of this handout.
❖	Before using a Z Code <u>YOU MUST ALWAYS CALL THE PAYOR</u> to verify that all the information listed on the patient's insurance card is accurate.
1.	Determine: a) Type of insurance
2.	Use: a) the OTHER Quick Access Menu
3.	Choose: The Z Code listing that matches: <ul style="list-style-type: none"> ➤ Network name and type or ➤ Insurance company name and type <p>Note: <i>If you are unable to locate a Network or Insurance Company name that matches your patient's card, refer to page 20 for detailed instructions on using "ZZ" Codes</i></p>
4.	Edit/Change: a) The insurance company name, address, and telephone number (in the FSC Follow-up questions) to match the information printed on the patient's insurance card.
5.	Notify: IMF Help that you have entered a "Z" Code into the IDX system Telephone 353-4850 or email HELP.IMF@UCSFMEDCTR.ORG .



**Z Codes
Other Quick
Access Menu**

IMF Look-ups

ZZ Codes

ZZ Code Policy-Miscellaneous IMF Codes	
❖	These codes should only be used when you are unable to find a match using one of the four look-up methods detailed on pages 3-6 of is handout.
❖	Before using a Z Code <u>YOU MUST ALWAYS CALL THE PAYER</u> to verify that all the information listed on the patient’s insurance card is accurate
❖	ONLY after you have used all IMF search methods (See pages 15-19) and are unable to locate an appropriate IMF Plan Code, should you use a ZZ Code.

Step	Action
1)	Determine: a) Type of insurance b) Insurance company name c) Network name, if applicable
2)	Select: a) An appropriate IMF Plan Code as follows: i. ZZ1- Indemnity, PPO or POS Tier 2 and Tier # ii. ZZ2- HMO, POS Tier 1, EPO, Medi-Cal Managed Care, or Medicare Risk HMO iii. ZZ3- Workers' Compensation
3)	Notify: The IMF Department each time you enter a “ZZ” Code in the IDX system. Telephone 353-4850 or email HELP.IMF@UCSFMEDCTR.ORG .
4)	Edit/Change: a) The insurance company name, address, and telephone number (in the FSC Follow-up questions) to match the information printed on the patient’s insurance card.