



Health Care Agency Behavioral Health Services Policies and Procedures	Section Name:	Administration
	Sub-section:	Billing & Reimbursement
	Section Number:	04.02.04
	Policy Status:	<input type="checkbox"/> New <input checked="" type="checkbox"/> Revised

	SIGNATURE	DATE APPROVED
Chief of Operations Behavioral Health Services	_____	_____

SUBJECT: Procedures for Obtaining, Maintaining, and Deleting Medicare Provider Transaction Access Number (PTAN)

PURPOSE:

To establish a procedure for obtaining, maintaining, and deleting a Provider Transaction Access Number (PTAN).

POLICY:

Applications for Medicare PTANs shall be completed accurately. PTANs shall be deleted in a timely manner when a provider terminates employment with the County of Orange. PTANs shall be managed in a manner that facilitates limiting the people with access to the information to those with a need to know.

SCOPE:

The process applies to all designated, eligible service providers providing Medicare covered services within BHS County clinics.

REFERENCES:

- Medicare Part B Billing Manual: Chapter 3, pages 3-4 to 3-7
- Procedure for Obtaining, Maintaining and Deactivating BHMIS Therapist Numbers
- BHS P&P 05.01.02, Use and Flow of the Encounter Document

DEFINITIONS:

- Provider:** A BHS clinical staff person providing services to BHS clients.
- Eligible provider:** Only people with certain licenses are eligible to apply to bill services independently to Medicare. These include Medical Doctors (MDs), Doctors of Osteopathy (DOs), Licensed Psychologists, Licensed Clinical Social Workers (LCSWs), and Nurse Practitioners (NPs).
- Designated, eligible provider:** Those eligible providers who are designated by their Division Manager or designee to bill Medicare are defined as “designated, eligible providers” and are referred to herein as “providers”.

SUBJECT: Procedures for Obtaining, Maintaining, and Deleting Medicare Provider Transaction Access Number (PTAN)

Carrier: The local intermediary designated by the federal government to process Medicare PTAN, currently Palmetto GBA.

PECOS: Provider Enrollment, Chain and Ownership System. The on-line method for enrolling as a Medicare provider.

Provider Transaction Access Number (PTAN): An identifier assigned by the Medicare carrier to an eligible provider. The identifier is linked to a list of specific treatment locations.

Group PTAN: An identifier assigned by the Medicare carrier to a particular group providing clinical services.

PROCEDURE:

- I. Obtaining a Medicare PTAN:
 - A. QIPC staff shall provide consultation and assistance.
 - B. Administration staff shall complete the Personnel Action Notification (PAN), indicating if a clinician is qualified as a “eligible provider” and choosing whether to classify the clinician as a “designated, eligible provider.”
 - C. If the clinician is designated, QIPC shall contact them for an appointment to assist with completing their on-line enrollment through the Provider Enrollment, Chain and Ownership System (PECOS).
 - D. Upon completion of the on-line application, signature attestation sheets shall be printed and the clinician shall sign them.
 - E. QIPC shall then forward the signature sheet for the “Reassignment of Benefits” to the “authorized signer” for Health Care Agency for their signature.
 - F. Upon return of the document with appropriate signature, QIPC shall mail the application signature sheets via registered mail to the appropriate carrier.
 - G. Copies of the applications and signed attestation sheets will be kept at QIPC.
 - H. Upon notification from the carrier of assigned PTAN numbers, QIPC shall notify IRIS staff and update the circulated list of active PTANs in BHS.
- II. Deleting Medicare PTAN Numbers
 - A. QIPC shall comply with Medicare regulations regarding deleting and/or deactivating a PTAN should a clinician no longer occupy a billing position or leave BHS.
- III. Quality Assurance:
 - A. BHS Quality Improvement and Program Compliance shall be responsible for tracking all BHS provider PTAN numbers.

- B. Access to PTAN information shall be limited to those involved in the processes ensuring appropriate billing procedures are followed.
- C. An electronic list of active PTAN's will be issued to all Service Chiefs, Reviewers and Office Managers weekly.
- D. At least annually, QIPC shall circulate a list of BHS providers and their associated PTAN number(s) to Divisions for review, and correction if needed.