

Data Import Wizard – Insurance Header Details

NOTE: Insurances are often added manually as the Payer ID used in a previous system usually needs to be reviewed and/or updated when setting up your Office Ally account. Manually adding your Payer list may be faster than using the import wizard.

Header	Format	Description	Destination
Name		Required Field (Text Field)	Manage Office > Insurances > Edit > Insurance Name
Payer ID		Should match Office Ally Payer List, typically 5 characters (Text Field)	Manage Office > Insurances > Edit > Payer ID
Street 1		(Text Field)	Manage Office > Insurances > Edit > Address Line 1
City		(Text Field)	Manage Office > Insurances > Edit > City
State	Two-character state abbreviation, ex.: TX, CA, NY	50 states plus AA, AE, AP, AS, DC, FM, GU, MH, MP, PR, PW, and VI (Picklist)	Manage Office > Insurances > Edit > State
Zip Code		(Text Field)	Manage Office > Insurances > Edit > Zip
Contact		(Text Field)	Manage Office > Insurances > Edit > Contact Name
Phone		(Text Field)	Manage Office > Insurances > Edit > Phone
Type	Medicare, Medicaid, Tricare Champus, ChampVA, Group Health Plan, Feca Blk Lung, Commercial, Self-Pay, Workers Comp, Personal Injury, Auto, EAP, or Other	(Picklist)	Manage Office > Insurances > Edit > Insurance Type