

How do I keep a patient's insurance history?

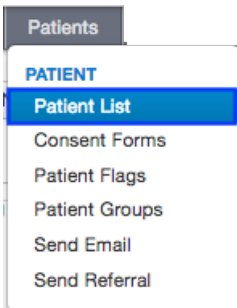
07/24/2024 4:05 pm EDT

Historical insurance information may be needed to bill correctly for previous appointments. Appointments are automatically associated with the active insurance on the date of service.

*** **NOTE:** When you edit a patient's current insurance information, the old information is **NOT** automatically archived. You must first archive the current information, and then edit the information for it to save in the patient's insurance history. ***

Please follow the below instructions to save the patient's previous insurance information to their insurance history section:

1. Hover over the **Patient** and choose **Patient List**



2. Search for the patient's chart by entering the Patient's name or Chart ID in the **Patient search** field.

Manage your existing patients ? Bulk Import Export (CSV) Export (C-CDA XML)

Patient search... More Filters

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Chart ID	Last Name	First Name	Home Phone	Cell Phone	Last Appt	Next Appt	Follow-up	Valid Ins
ALSY000001					Wed, 03/25/2015			▲
ANJE000001				718-878-5383	Wed, 10/21/2015			▲
AURE000001					Mon, 07/04/2016			✓
BAHI000001								✓
BAMA000001								✓
BEHA000001								✓

3. In the patient demographics, click on the **Insurance** section and then click on **Manage Alternative Insurances & History**.

Demographics | Important | Demographics | **Insurances** | Eligibility | Authorizations | Smoking Status | Flags | Balance | onpatient Payments

Primary Ins | Secondary Ins | Tertiary Ins | Auto Accident | Worker's Comp | Durable Med Eqpt

Default Primary Insurance [Manage Alternative Insurances & History](#)

Subscriber is the Patient Insured person is the same person as the Patient

Insurance Company: UMR (formerly Harrington Benefit S) *contact support if you can't find an insurance company.

Carrier Payer ID: 75196

TPL Code: *if the Medicaid is Secondary

Insurance ID Number: 878868979W

Insurance group name: *if available

Insurance group number: *if available

Insurance plan name: *if available

Insurance plan type: *if available

Insurance claim office number: *if available

4. In the Insurance history section, click on + **History** to add the previous insurance to the history section. With the effective dates listed as **Start date/End date**, any appointment that needs to be submitted that falls within that range will be submitted with the previous insurance information, not what is listed as the patient's current insurance.

Current Insurance Details for Amy Smith [?](#)

Insurance Type	Insurance company	Payer ID	Ins ID #	Ins Group #	Claim Office #	Plan Name	Insurance Notes	Default?	
Primary Professional	UMR (formerly Harrington Benefit Services - Westerville)	75196	878868979W					Yes	Edit + History
Secondary Professional								Yes	Edit + History

+ Primary Ins | + Secondary Ins | + Auto Accident Ins | + Worker's Comp Ins | + DME Ins

Adding Insurance History for Amy Smith

Default? Default insurance cannot overlap another default insurance.

Insurance Type: Primary Professional

Start Date: 07/01/2016

End Date: 07/31/2016

No Insurance Patient had no insurance in given period

Subscriber is the Patient Insured person is the same person as the Patient

Insurance Company: UMR (formerly Harrington Benefit S) *contact support if you can't find an insurance company.

Carrier Payer ID: 75196

TPL Code:

Insurance ID Number: 878868979W

Insurance group name: *if available

Insurance group number: *if available

Plan Name: *if available

Plan Type: *if available

Insurance claim office number: *if available

Number visits allowed per year:

Insurance Notes:

All patient data listed in this article is sample data. This is not a real person or real patient data.

5. Additional previous insurance information can be added to the history section by using the + **Primary Ins**, + **Secondary Ins**, + **Auto Accident Ins**, + **Worker's Comp Ins** & + **DME Ins** buttons.

Current Insurance Details for Amy Smith ⓘ

Insurance Type	Insurance company	Payer ID	Ins ID #	Ins Group #	Claim Office #	Plan Name	Insurance Notes	Default?	
Primary Professional	UMR (formerly Harrington Benefit Services - Westerville)	75196	879868979W					Yes	Edit + History
Secondary Professional								Yes	Edit + History

[+ Primary Ins](#) [+ Secondary Ins](#) [+ Auto Accident Ins](#) [+ Worker's Comp Ins](#) [+ DME Ins](#)