I've Updated the Patient's Insurance but it's not Reflecting in the Live Claims Feed

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When you update the insurance information in the patient's demographics, it will reflect the change for appointments you create in the future. It does not change them retroactively.

To change the insurance information for appointments you have created in the past, you can manually update the appointments so they will bill the proper payer.

This is how it could look if you have just updated a patient's insurance. The demographic section (top picture) shows Aetna as the patient's primary insurance, whereas, if you go into the Live Claims Feed (bottom picture) appointments may show the prior insurance Cigna.

Here is how you can manually update it:

1. Navigate to **Billing > Live Claims Feed**. Select the patient and click on the Visit date. This will direct you to the **Billing Detail** screen.

Billing

BILLING

Billing Summary

Live Claims Feed

Patient Payments

Day Sheet

Transactions

Remittance Reports

Unmatched ERAs

Insurance Credit Card Payments

Accounts Receivable

Patient Statements

Product/Procedure

Patient Balance Ledger

Fee Schedule

Underpaid Items

Adjustment Master

Sales Tax

Billing Log

2. To update the new insurance information on the appointment, simply click on **Verify & Save.** This will pull over the new payer information to the appointment.

The above method would work if the original payer was incorrect.

If there is a change in payer on a specific date (such as the first of the calendar or fiscal year), you can also use the **Save to Insurance** history option. This option will allow you the flexibility to continue to bill/work on claims with

the previous payer as well as bill claims to the new payer. You can find additional information on that feature here.