

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

07/24/2024 5:25 pm EDT

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.

The screenshot shows the 'Primary Insurance' section of a patient's demographic information. At the top, there are tabs for 'Primary Ins', 'Secondary Ins', 'Tertiary Ins', 'Auto Accident', 'Worker's Comp', and 'Durable Med Eqpt'. The 'Primary Insurance' tab is selected. Below the tabs, there is a section for 'Patient Insurance History'. A checkbox labeled 'Subscriber is the Patient' is checked, and another checkbox 'Insured person is the same person as the Patient' is also checked. The 'Insurance Company' dropdown menu is set to 'Aetna' and is highlighted with a red box. Below this, there are several input fields for 'Carrier Payer ID', 'TPL Code', 'Insurance ID Number', 'Insurance group name', 'Insurance group number', 'Insurance plan name', 'Insurance plan type', and 'Insurance claim office number'. Each field has a small asterisk and the text '*if available' next to it. The 'Number visits allowed per year' field is also present.

The screenshot shows the 'Live Claims Feed' table. At the top, there are buttons for 'Batch Status Change', 'Export to File', 'Custom Export', 'Display', '+ Schedule', and 'Internal'. The table has columns for 'Info', 'Claim ID', 'Patient', 'Date of Service', 'Office', 'Provider', 'Billed', 'Allowed', 'Adjmt', 'Ins 1 Paid', 'Ins 2 Paid', 'Pt Paid', 'Ins Bal', 'Pt Bal', 'Claim Bal', 'Exp Reimbr', 'Ins 1', 'Ins 1 Status', 'Ins 2', 'Ins 2 Status', 'First EDI', 'Last EDI', 'Service Notes', and 'Billing Notes'. The table shows a summary row with totals: 'Totals: \$3,092.00 \$2,936.31 \$155.69 \$79.31 \$0.00 \$3,010.00 \$797.00 (\$950.00) (\$153.00) \$55.00'. Below the summary, there are three rows of claims. Each row has a checkbox, a claim ID, patient name, date of service, office, provider, billed amount, allowed amount, adjmt, ins 1 paid, ins 2 paid, pt paid, ins bal, pt bal, claim bal, exp reimbr, and ins 1. The 'ins 1' column for all three rows is 'CIGNA', and the 'ins 1 Status' column for all three rows is 'Not submitted'. The 'ins 1' column is highlighted with a red box.

Info	Claim ID	Patient	Date of Service	Office	Provider	Billed	Allowed	Adjmt	Ins 1 Paid	Ins 2 Paid	Pt Paid	Ins Bal	Pt Bal	Claim Bal	Exp Reimbr	Ins 1	Ins 1 Status	Ins 2	Ins 2 Status	First EDI	Last EDI	Service Notes	Billing Notes															
Totals: \$3,092.00 \$2,936.31 \$155.69 \$79.31 \$0.00 \$3,010.00 \$797.00 (\$950.00) (\$153.00) \$55.00																																						
<input type="checkbox"/>	26855628	Eugene Walsh	3/10/2016 09:00AM	EVIL SPECIALITY	Dr. Eugene Walsh	\$230.00	\$230.00	\$0.00	\$0.00	\$0.00	\$0.00	\$230.00	\$0.00	\$230.00	\$5.00	CIGNA	Not submitted																					
<input type="checkbox"/>	26820396	Eugene Walsh	3/09/2016 09:00AM	EVIL SPECIALITY	Dr. Eugene Walsh	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	CIGNA	Not submitted																					
<input type="checkbox"/>	26784252	Eugene Walsh	3/08/2016 09:00AM	EVIL SPECIALITY	Dr. Eugene Walsh	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	CIGNA	Not submitted																					

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.

Patient's unallocated payment \$475.80 Primary Insurer: (60054) Aetna Patient owes 30

#	ICD-10	Description
1	G43.C0	Periodic headache syndromes in child or adult, not intractable

#	ICD-9 to Convert	Description
1	001	CHOLERA
2	784.0	HEADACHE

Code/Check Date	Modsl/Posted Date	Service Date	Qty/Min	Dx Pointers	Price	Billed	Allowed	Adjmt	Ins 1 paid	Ins 2 paid	Pt Paid	Ins Bal	Pt Bal	Status/Adj Type
Totals:						\$230.00	\$230.00	\$0.00	\$0.00	\$0.00	\$0.00	\$230.00	\$0.00	Not submitted
C 96213			1.00	1 0 0 0	230.00/\$5.00	\$230.00	\$230.00	\$0.00	\$0.00	\$0.00	0.00	\$230.00	\$0.00	Not Submitted

Info	Claim ID	Patient	Date of Service	Office	Provider	Billed	Allowed	Adjmt	Ins 1 Paid	Ins 2 Paid	Pt Paid	Ins Bal	Pt Bal	Claim Bal	Exp Reimbr	Ins 1	Ins 1 Status	Ins 2	Ins 2 Status	First EDI	Last EDI		
Totals:						\$3,092.00	\$2,936.31	\$155.69	\$79.31	\$0.00	\$3,010.00	\$797.00	(\$950.00)	(\$153.00)	\$55.00								
	26874967	Eugene Walsh	3/11/2016 09:00AM	EVIL SPECIALITY	Dr. Eugene Walsh	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Aetna	Not submitted						
	26855628	Eugene Walsh	3/10/2016 09:00AM	EVIL SPECIALITY	Dr. Eugene Walsh	\$230.00	\$230.00	\$0.00	\$0.00	\$0.00	\$0.00	\$230.00	\$0.00	\$230.00	\$5.00	Aetna	Not submitted						
	26820396	Eugene Walsh	3/09/2016 09:00AM	EVIL SPECIALITY	Dr. Eugene Walsh	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	CIGNA	Not submitted						
	26784252	Eugene Walsh	3/08/2016 09:00AM	EVIL SPECIALITY	Dr. Eugene Walsh	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	CIGNA	Not submitted						

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](#).
