

Submitting Claims to Multiple Primary Insurances.

07/24/2024 9:21 pm EDT

To submit claims to multiple primary insurances, you will need to submit a ticket to the [support team](#) to have the "multiple primary" feature enabled. Once the request is processed and the feature is activated, please follow the steps outlined below:

This feature is especially helpful for Chiropractors and/or Mental Health providers where eligibility is through the payer (i.e. Cigna, Aetna) but the claim needs to go to a different payer for processing (i.e. American Specialty Health/ASH, Magellan Health)

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

1. Please select a patient and navigate to the demographics screen.
2. Add the primary insurance information in the **Primary Ins** tab and click **Save Demographics**.

The screenshot displays the 'dr chrono' patient demographics interface for Amanda Jones. The interface includes a navigation menu on the left with options like 'Add new patient', 'Demographics', 'Appointments', and 'Medication List'. The main content area shows patient details: Amanda Jones, Female, 38 years old, born Aug 23, 1977. Contact information includes phone (212-555-5555), email (daniel+amanda@drchrono.com), and address (100 Demo Drive, Mountain View, CA 94043). The 'Primary Provider' is Christopher Daniel. A red box highlights the 'Primary Ins' tab in the insurance section. Below this, there are checkboxes for 'Subscriber is the Patient' and 'Insured person is the same person as the Patient', and a dropdown menu for 'Insurance Company' currently set to 'Aetna'. A note at the bottom right says '*contact support if you can't find an insurance company.'

dr chrono Srinivasa Sai Srinivasa Sai (srinivasasai)

Schedule Clinical Patients Reports Billing Account Help

+ Add new patient

Demographics

Appointments

Clinical Dashboard

Documents

Tasks 0

Problem List 5

Medication List 2

Send eRx

Allergy List 0

Drug Interactions 0

CQMs

Intake Data

Lab Orders

Feedback Support

Practice Chat

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

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

Insurance Company Aetna *contact support if you can't find an insurance company.
 PO Box 981106, El Paso, TX 79998

Carrier Payer ID 60054

TPL Code *If the Medicaid is Secondary

Insurance ID Number 2165165155

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

Number visits allowed per year

Card issued date *Required for checking eligibility of CA Medicaid

Primary Insurance Notes

dr chrono Srinivasa Sai Srinivasa Sai (srinivasasai)

Schedule Clinical Patients Reports Billing Account Help

Problem List 5

Medication List 2

Send eRx

Allergy List 0

Drug Interactions 0

CQMs

Intake Data

Lab Orders

Immunizations

Growth Charts

onpatient Access

Education Resources

Communication

Family History

Practice Chat

Insurance plan name *if available

Insurance plan type *if available

Insurance claim office number *if available

Number visits allowed per year

Card issued date *Required for checking eligibility of CA Medicaid

Primary Insurance Notes

Insurance Photo Front Choose File No file chosen

Insurance Photo Back Choose File No file chosen

HCFA Options

Default Onset Date HCFA Box #14

Default Initial Visit Date HCFA Box #15

Prepopulate Last Related Visit HCFA Box #19

Save Demographics

https://srinivasasai.drchrono.com/misc/patient_med_orders/59797854/

3. Click on **Manage Alternative Insurances and History**.

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Schedule Clinical Patients Reports Billing Account Help

+ Add new patient

Demographics

Appointments

Clinical Dashboard

Documents

Tasks 0

Problem List 5

Medication List 2

Send eRx

Allergy List 0

Drug Interactions 0

CQMs

Intake Data

Lab Orders

Feedback Support

Practice Chat

Primary Provider: Christopher Daniel

New Referral Fax Demographics Print Demographics + Schedule New Appointment

Important Demographics Insurances Eligibility Authorizations Smoking Status Flags Balance

Sufficient patient demographics to bill insurance.

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 Aetna *contact support if you can't find an insurance company.
 PO Box 981106, El Paso, TX 79998

Carrier Payer ID 60054

TPL Code *If the Medicaid is Secondary

Insurance ID Number 2165165155

Insurance group name *if available

Insurance group number *if available

4. In this screen you will find the patient's primary insurance that you just entered listed as the default.

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Schedule Clinical Patients Reports Billing Account Help \$ ✕

Search 8

Current Insurance Details for Amanda Jones

| Insurance Type | Insurance company | Payer ID | Ins ID # | Ins Group # | Claim Office # | Plan Name | Insurance Notes | Default? | |
|------------------------|-------------------|----------|------------|-------------|----------------|-----------|-----------------|----------|--|
| Primary Professional | Aetna | 60054 | 2165165155 | | | | | Yes | Edit + History |
| Secondary Professional | | | | | | | | Yes | Edit + History |

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

Insurance History for Amanda Jones

Patient has no insurance history.

[Add New History](#)

5. In order to add another primary insurance click on **+Primary Ins.**

Schedule Clinical Patients Reports Billing Account Help \$ ✕

Search 8

Current Insurance Details for Amanda Jones

| Insurance Type | Insurance company | Payer ID | Ins ID # | Ins Group # | Claim Office # | Plan Name | Insurance Notes | Default? | |
|------------------------|-------------------|----------|------------|-------------|----------------|-----------|-----------------|----------|--|
| Primary Professional | Aetna | 60054 | 2165165155 | | | | | Yes | Edit + History |
| Secondary Professional | | | | | | | | Yes | Edit + History |

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

Insurance History for Amanda Jones

Patient has no insurance history.

[Add New History](#)

6. Here, you can enter the additional primary insurance information for the patient. Once entered, click **Create.**

Schedule Clinical Patients Reports Billing Account Help \$ ✕

Search 8

Adding Primary Insurance for Amanda Jones

Insurance Type: Primary Professional

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

Insurance Company: AARP MedicareComplete through... [*contact support if you can't find an insurance company.](#)

PO BOX 740819

Carrier Payer ID: 87726

Tpl code:

Insurance ID Number: 123456789

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:

Feedback Support [Practice Chat](#)

7. And now you will find two primary insurances listed for the patient and the first insurance listed as default.

| Insurance Type | Insurance company | Payer ID | Ins ID # | Ins Group # | Claim Office # | Plan Name | Insurance Notes | Default? |
|------------------------|--|----------|------------|-------------|----------------|-----------|-----------------|----------|
| Primary Professional | Aetna | 60054 | 2165165155 | | | | | Yes |
| Primary Professional | AARP MedicareComplete through UnitedHealthcare/AARP MedicareComplete | 87726 | 123456789 | | | | | No |
| Secondary Professional | | | | | | | | Yes |

8. When the patient schedules an appointment, you will have 2 options under **Primary Insurer**.

9. Under the **Billing** tab on the appointment window, select the **Primary Insurer** dropdown. From here, you can select which payer needs to be billed for this appointment.

10. Click on Save.

You will also have the option to update which payer the claim should be sent to in the Live Claims Feed. (**Billing > Live Claims Feed**)

- 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

| | | |
|-------------------------|----------------------|---|
| ? Billing Status | <input type="text"/> | ▼ |
| ICD Version | ICD-10 | ▼ |
| Primary Insurer | - Default - | ▼ |
| Secondary Insurer | - Default - | ▼ |

Here is a [video](#) that will walk you through working with multiple primary insurances.
