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.



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3. Click on Manage Alternative Insurances and History.

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Schedule Clinical	Fatients Reports Dining	Account neip \$,		Search 💽 📑
+ Add new patient	Primary Provider: Chris	stopher Daniel		
+ Add new patient	New Referral Fax Demog	raphics 🔒 Print Demographic	S	+ Schedule New Appointment
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Clinical Dashboard	 Sufficient patient demograp 	phics to bill insurance.		
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Problem List 5	Subscriber is the Patient	Insured person is the same perso	in as the Patient	
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Problem List Medication List Send eRx Allergy List Drug Interactions	Subscriber is the Patient Insurance Company Carrier Payer ID TPL Code	Insured person is the same person Aetna PO Box 981106, El Paso, TX 79998	in as the Patient	
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4. In this screen you will find the patient's primary insurance that you just entered listed as the default.

	Details for Amanda					-				
surance Type rimary Professional	Insurance company Aetna	Payer ID 60054	Ins ID # 2165165155	Ins Group #	Claim Office #	Plan Name	Insurance Notes	Default? Yes	🖉 Edit	+ History
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5. In order to add another primary insurance click on **+Primary Ins**.

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

Schedule Clinical Pa	atients Reports Billing	Account Help	\$ ×	Search) 🛂 📃
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Insurance Type	Primary Professional				
Subscriber is the Patient	Insured person is the same person	as the Patient			
Insurance Company	AARP MedicareComplete through &	*contact supp	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			
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7. And now you will find two primary insurances listed for the patient and the first insurance listed as default.

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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.

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Schedule Clin	Appointment Billing	Vitals Revisions Eligibilit	y Flags Custom Data Com. Log MU Helper	▲ <u> </u>
9 Jun ▼ 2016 ▼			Patient SuperBill 💌 Clinical Note Billing Details Other Forms	doctor weekly monthly
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5 6 7 8 9 10	Primary Insurer	- Default -	Auto Accident No 🔻	
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D Drint Americanovsta	Payment Notes		Onset date (HCFA Box #14)	
Print Appointments	Payment Posted Date	06/29/2016	Initial visit date (HCFA Box #15)	
Doctors Select all / n	Pre Authorization Approval #		Last related visit date (HCFA Box #19)	
Robinson Grey Christopher Daniel	Referral #			
Dr. Eugene Walsh	Payment profile	T		
Dr. David Prabhakaran	Billing Profile	• +		
 Srinivasa Sai 	Billing Pick List	Choose Codes from Pick List		
	Diagnosis Pick List	Choose Codes from Pt Problems		
Offices Select all / n				-
EVIL SPECIALITY	ICD-10 Codes	Find Diagnosis codes	CPT Codes Find CPT Procedure codes	



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		~
ICD Version	ICD-10	~
Primary Insurer	- Default -	~
Secondary Insurer	- Default -	~

Here is a video that will walk you through working with multiple primary insurances.