

Crossover payers

Last modified on 06/04/2025 10:35 am EDT

DrChrono has made some exciting updates for your patients with primary and secondary insurance. If their primary payer knows about their secondary coverage, they will send it with the 835/ERA file as they send responses/payments on claims.

Patient Flag | Billing Note


If this secondary information is received on an 835/ERA file, and there is no secondary information listed on your patient's account, the DrChrono system will post it for you. A flag will be posted on the account, and a note will be placed on the appointment in the Live Claims Feed to alert you that secondary insurance information has been added via the ERA/835 file.

If Medicare has secondary insurance information on file for a patient, they will automatically forward the claim to that payer if there is a remaining patient responsibility amount after they have processed the claim.

Patient Flag:

The entry under the patient's chart will show you that the system updated the information (type and description), the billed appointment that triggered the addition (appointment), the date the information and flag were added (date) and that the system automatically added the information (updated by). "Auto Update" indicates that the system automatically added the information based on the received ERA/835 files.

1. Entry under Patient Flags in the patient's chart:

| Patient Flags | | | | | | Show Archived Flags |
|---|------------------------|-------------------------------------|---------------------|-------------|----------------------|----------------------------|
| Type | Description | Appointment | Date | Updated by | | |
|  System Update | Cross Over Payer Added | 2022-06-30 08:00:00 | 2022-09-21 09:57:49 | Auto Update | Edit | Archive |
| | | | | | | + Add Flag |

2. Flag under the appointment in the Live Claims Feed:



Billing Note:

Along with the flag, a note will be entered under the billing notes of the triggering appointment to alert you that the information was added to the patient's account. The author will be listed as "DrChrono Bot".

DrChrono Bot Claim Crossed Over To: MARYLAND MEDICAID (70101)
10/04/2022, 6:24 a.m.

If you would rather the system not update this information, please reach out to [support](#). They can turn it off for you.
