

Searching Enrolled Payers First

Last modified on 11/22/2024 9:03 am EST

In DrChrono you have the ability to prioritize the payers you are enrolled with so that they are brought to the top of the list when searching for insurance payers.

In the image below, there are several options for the payer being searched. If the desired payer is not at the top of the list, we can enable a setting so that your preferred payers show at the beginning of the list, making them easier to find.

The screenshot shows the 'Insurances' tab in the DrChrono account settings. At the top, there are navigation tabs: Important, Demographics, Insurances (selected), Authorizations, Smoking Status, Flags, and Balance. Below these are sub-tabs for insurance types: Primary Ins (selected), Secondary Ins, Tertiary Ins, Primary Hospital, Secondary Hospital, Auto Accident, and Worker's Comp. The main section is titled 'Default Primary Insurance' and includes links for 'Save to Insurance History' and 'Manage Alternative Insurances & History'. A checkbox 'Subscriber is the Patient' is checked, with the text 'Insured person is the same person as the Patient'. The 'Insurance Company' field has a dropdown menu open, showing a list of Aetna-related options. The dropdown items include: 60054: Aetna PO Box 981106, El Paso, TX 79998-1106; EPRNT1682: Aetna; Aetna P.O. Box 13441, Pensacola, FL 32591; EPRNT1914: Aetna; Aetna P.O. Box 14079, Lexington, KY 40512-4079; EPRNT873: AETNA PPO; AETNA PPO p.o box 981106, El paso, TX 79998; 13383: Orthonet- Aetna; 60055: Aetna Encounters; Z1420: Aetna RX Caremark; 88221: Texas Health Aetna; 7780: Allina Health | Aetna; and 54398: Allina Health | Aetna PO Box 981106, El Paso, TX 79998. A note next to the dropdown says '*contact support if you can't find an insurance company.' To the right of the dropdown, there is a note: 'insurance company set for claim submission is different from the actual patient's insurance'.

Set-Up for your account

1. Navigate to **Account > Provider Settings**.
2. Select the **Medical Billing** tab.

Account Settings

[Profile](#)
[View](#)
[General](#)
[Email](#)
[Medical Billing](#)
[eRx Info](#)
[Services](#)
[Usage](#)
[Sample Data](#)
[Security](#)
[Patient Payments](#)
[Receipt Options](#)

Medical Billing

Default Billing Provider

Billing NPI Required for eRx & billing. Group NPI can be same as rendering NPI #

Rendering Provider NPI Individual Provider NPI #. Leave blank if the same as billing NPI

Practice Official Name

Practice Tax ID

CLIA Number Optional: For CLIA certified labs

CLIA # Expiration Optional: Expiration date of CLIA #

Billing Taxonomy Code Optional: Leave blank to let the system choose

Rendering Taxonomy Code Optional: Leave blank to let the system choose

Individual Medicare PTAN

Group Medicare PTAN

Individual BCBS Number

Group BCBS Number

3. Scroll down to the **Miscellaneous** section. Select the **Search Enrolled Payers First** box and **Update Entire Profile**.

Miscellaneous

Default ICD Code Version The default icd version (icd-9 or icd-10) for new created appointment

Copying billing respects provider "Copy Last Billing" in billing profiles dropdown and "Auto Copy Procedures" copy billing data from the last appointment scheduled by you.

Copy Proc From Pt's Last Appt Auto copy procedures from patient's last appointment when scheduling a new professional appointment (won't take effect when new appointment is having billing profile attached).

Copy Dx From Pt's Last Appt Auto copy diagnosis from Patient's last appointment when scheduling a new professional appointment.

Copy Dx From Pt's Problem List Auto copy diagnosis from patient problem list when scheduling a new professional appointment (won't take effect when Copy Diagnosis From Patient's Last Appointment is checked).

Auto Set Problems Automatically adds ICD10 codes to patients problem list when appointment is created or edited

Auto Set Billing Status Change the billing status to "Paid in full" and "Balance due" when ERA is received

Change the billing status to "Paid in full" and "Balance due" from billing screen

Change the billing status to "Paid in full" and "Balance due" when patient's payment is applied

Change the billing status to when the note is locked and the billing status is blank. Only custom billing statuses are supported.

Balance Writeoff Auto-write-off patient balance when claim is changed to "Settled"

Auto-write-off insurance balance when claim is changed to "Settled"

Default Patient Payment Profile

Hours worked per week, for utilization analysis

Include patient problems in clinical note

Search Enrolled Payers First Prioritize enrolled payers in insurance section of patient demographics.

EDI export sender ID Sender ID

EDI export receiver ID Receiver ID

EDI export receiver organization name

Auto-populate claims with referring/ordering provider if blank

Payment Methods

Show DSM5 Codes

