

Submitting claims to multiple Workers' Compensation Insurances

09/17/2024 3:46 pm EDT

To submit claims to multiple workers' compensation insurances, or for multiple workers' compensation injuries, 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:

1. Please select a patient and navigate to the demographics screen.
2. Add the workers' compensation insurance information in the **Worker's Comp** tab and click **Save Demographics**.

Jenny (Jen) Harris I (Female | 41 years old | Feb. 11, 1980) HAJE000001

Phone: [Redacted] Email: jenny.adele.harris@gmail.com Date Added: June 2, 2021
Address: 1001 N Rengstorff Ave Last Scheduled Appt: Wed Jun 09, 2021
Mountain View, CA 94040 Next Scheduled Appt: Tue Jul 06, 2021
CDS: Adult Immunization Schedule Age: 27-49

onpatient access enabled

Primary Provider: [Redacted]

New Referral Fax Demographics Print Demographics Vitals Schedule New Appointment

Important Demographics Insurances Authorizations Smoking Status Flags Balance

Sufficient patient demographics to bill insurance.

Primary Ins Secondary Ins Tertiary Ins Primary Hosp Secondary Hosp Auto Accident **Worker's Comp** Durable Med Eqpt

Make sure you fill in the Date of Accident and Insurance Case # fields.

Date of Accident 01/01/2021

Insurance W.C.B. # [Redacted]

Insurance W.C.B. Rating Code [Redacted]

Insurance Carrier Code [Redacted]

Insurance Case # 123456

State of Occurrence California

Property & Casualty Agency Claim # [Redacted] *only for property & casualty claims

Workers comp notes [Redacted]

Save Demographics Save & Close

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

Important Demographics **Insurances** Authorizations Smoking Status Flags Balance

✓ Sufficient patient demographics to bill insurance.

Primary Ins Secondary Ins Tertiary Ins Primary Hosp Secondary Hosp Auto Accident **Worker's Comp** Durable Med Eqpt

Default Worker's Compensation **Manage Alternative Insurances & History**

4. On this screen you will see the patient's workers' comp insurance that you just entered.

5. To add another workers' comp insurance click on **+Worker's Comp Ins.**

Current Insurance Details for Jenny (Jen) Harris | ⓘ

Insurance Type	Insurance company	Payer ID	Ins ID #	Ins Group #	Claim Office #	Plan Name	Insurance Notes	Default?	
Primary Professional								Yes	Edit + History
Secondary Professional								Yes	Edit + History
Primary Hospital								Yes	Edit + History
Secondary Hospital								Yes	Edit + History
Auto Accident								Yes	Edit
Worker's Comp	Travelers	19046						Yes	Edit

+ Primary Ins + Secondary Ins + Auto Accident Ins **+ Worker's Comp Ins** + DME Ins

Please make sure you enter the date of the accident and the workers' comp case number for the second worker's comp insurance.

Date of Accident	<input type="text"/>	←
Insurance W.C.B. #	<input type="text"/>	
Insurance W.C.B. Rating Code	<input type="text"/>	
Insurance Carrier Code	<input type="text"/>	
Insurance Case #	<input type="text"/>	←
State of Occurrence	—Select a State—	
Property & Casualty Agency Claim #	<input type="text"/>	*only for property & casualty claims

Create Cancel

6. Once all of the information is entered, click **Create**.

Insurance Case #

State of Occurrence

Property & Casualty Agency Claim # *only for property & casualty claims

7. If you refresh your screen, you will see both workers' compensation plans listed.

Current Insurance Details for Jenny (Jen) Harris | ⓘ

Insurance Type	Insurance company	Payer ID	Ins ID #	Ins Group #	Claim Office #	Plan Name	Insurance Notes	Default?	
Primary Professional								Yes	Edit + History
Secondary Professional								Yes	Edit + History
Primary Hospital								Yes	Edit + History
Secondary Hospital								Yes	Edit + History
Auto Accident								Yes	Edit
Worker's Comp	Travelers	19046						Yes	Edit
Worker's Comp	State Farm	J1548	987654					No	Edit Delete

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

Primary Insurer - Default -

Secondary Insurer Travelers | Case #: | Accident Date: 2021-01-01

State Farm | Case #: 987654 | Accident Date: 1990-10-01

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 Status**

ICD Version

Primary Insurer

Secondary Insurer

If you do not see the multiple payers under Primary Insurer (from the appointment or Live Claims Feed view), check to make sure that the payment profile is listed as Workers' Compensation.

