

Submitting Claims to Multiple Primary Insurances.

09/16/2024 3:24 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 shows a patient profile for Amanda Jones. The 'Insurances' tab is active, and the 'Primary Ins' sub-tab is highlighted with a red box. The insurance company is listed as Aetna. A green checkmark indicates 'Sufficient patient demographics to bill insurance.'

Amateur Jones (Female | 38 years old | Aug. 23, 1977) JOAM000001

Phone: 212-555-5555 **Email:** daniel+amanda@drchrono.com **Added:** June 16, 2016
Address: 100 Demo Drive
Mountain View, CA 94043 **Last Appt:** Mon Jun 20, 2016

CDS: Patient must have documented allergies Adult Immunization Schedule Age: 27-49

onpatient access enabled

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.

Feedback Support [Practice Chat](#)

[+ Add new patient](#)

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 Medical 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: *if available

Card issued date: *Required for checking eligibility of CA Medicaid

Primary Insurance Notes:

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

Insurance plan name: *if available

Insurance plan type: *if available

Insurance claim office number: *if available

Number visits allowed per year: *if available

Card issued date: *Required for checking eligibility of CA Medicaid

Primary Insurance Notes:

Insurance Photo Front: No file chosen

Insurance Photo Back: 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

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

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

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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.

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 Add New History

Patient has no insurance history.

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

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 Add New History

Patient has no insurance history.

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

Adding Primary Insurance for Amanda Jones

Insurance Type

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

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

Carrier Payer ID

Tpl code

Insurance ID Number

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

Carrier Payer ID

Tpl code

Insurance ID Number

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

Insurance Photo Front No file chosen

Insurance Photo Back No file chosen

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

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
Primary Professional	AARP MedicareComplete through UnitedHealthcare/AARP MedicareComplete	87726	123456789					No	Edit Delete
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](#)

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.

The screenshot shows the 'Schedule Appointment' window in the dr.chrono system, with the 'Billing' tab selected. The 'Primary Insurer' dropdown menu is open, displaying two options: 'Aetna' and 'AARP MedicareComplete through UnitedHealthcare/AARP MedicareComplete'. The 'Secondary Insurer' dropdown is also open, showing 'Aetna' and 'AARP MedicareComplete through UnitedHealthcare/AARP MedicareComplete'. The form includes fields for 'Billing Status', 'ICD Version', 'Patient Payment', 'Payment Notes', 'Payment Posted Date', 'Pre Authorization Approval #', 'Referral #', 'Payment profile', 'Billing Profile', 'Billing Pick List', and 'Diagnosis Pick List'. There are also sections for 'ICD-10 Codes' and 'CPT Codes' at the bottom.

10. Click on Save.

11. 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	<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.
