## Submitting Claims to Multiple Primary Insurances.

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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, 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. Select a patient and navigate to the demographics screen.
- 2. Add the primary insurance information in the Primary Ins tab and press Save Demographics.

		Amanda Jone Female Gender Ide JOAM000001	entity Unknown	47 years old (08,	(23/1977)						¢,	23 (	∋ @	₽,		Collapse
Pr O	rovider Ra nPatient <u>N</u>	andi Beavers ot Enabled-Invite	Address Date Added	123 Example Stree 10/01/2024	t, Sample City, 55555	Phone Prev Appt	<u>(555) 555-1234</u> 10/06/2024	Email Next Appt	<u>daniel+amanda@drch</u> None	rono.com						
Adu	It Immunizatio	on Schedule Age: 27-4	19													
P 	atient Cha	ırt	1	Demograph	nics											
Ī	Demograph	nmary														
	Appointmen	nts		Important	Demographics	Insura	inces Aut	horizations	Smoking Statu	s Flags		Balar	ice	DrCh	irono Pa	yments
	Clinical Das	hboard		Primary Ins	Secondary Ins	Tertiary Ins	Primary Ho	spital S	econdary Hospital	Auto Accider	nt	Worke	r's Comp	D D	urable I	Med Eqpt
-	Documents			Nefault Prima	ry Insurance	ave to Insu	irance History	Manag	e Alternative Insu	ances & Hi	story	,				
	Eligibility			Subs	criber is the Patient	Insured perso	n is the same person a	s the Patient								
_	Tasks		0	h	nsurance Company Carrier Payer ID		÷	*contact suppo	rt if you can't find an insuranc	e company.						

Primary Ins Secondary Ins	Tertiary Ins	Primary Hospital	Secondary Hospital	Auto Accident	Worker's Comp	Durable Med Eqpt
Default Primary Insurance	Save to Insura	nce History Ma	nage Alternative Ins	urances & Histo	ry	
Subscriber is the Patient	Insured person is	the same person as the Pati	ent			
Insurance Company		*contact	support if you can't find an insura	ince company.		
Carrier Payer ID						
Alternate Eligibility Payer		*It's req	uired when the insurance compar	ny set for claim submission	is different from the actual	patient's insurance
TPL Code		"If the M	ledicaid is Secondary			
Insurance ID Number						
Insurance group name		*if availa	ble			
Insurance group number		*if availa	ble			
Insurance plan name		*if availa	ble			
Insurance plan type		<ul> <li>✓ *if avail</li> </ul>	able			
Insurance claim office number		"if availa	ble			
Number visits allowed per year						
Card issued date		*Required for checking eligit	bility of CA Medicaid			
Primary Insurance Notes						
		10				
Insurance Photo Front	Choose File No	file chosen				
Insurance Photo Back	Choose File 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					
Save Demographics						Þ

3. Select Manage Alternative Insurances and History.

Amanda Jones Female Gender Identity Unknow JOAM000001	n   47 years old (08/23/1977)
Provider Randi Beavers Address OnPatient <u>Not Enabled-Invite</u> Date Addec	123 Example Street, Sample City, 5555         Phone         (555) 555-1234         Email         daniel+amanda@drchrono.com           10/01/2024         Prev Appt         10/06/2024         Next Appt         None
Adult Immunization Schedule Age: 27-49	
Patient Chart	Demographics
Patient Summary	
Demographics	
Appointments	Important Demographics Insurances Authorizations Smoking Status Flags Balance DrChrono Payments
Clinical Dashboard	Primary Ins Secondary Ins Tertiary Ins Primary Hospital Secondary Hospital Auto Accident Worker's Comp Durable Med Eqpt
Documents	Default Primary Insurance Save to Insurance History Manage Alternative Insurances & History
Eligibility	Subscriber is the Patient 🛛 Insured person is the same person as the Patient
Tasks	Insurance Company
	Carrier Payer ID

4. In this screen, you will find the patient's primary insurance that you just entered listed as the default.

Current Insurance D	Details	for Sample Insurance	ə <b>()</b>										
Insurance Type		Insurance company	Payer ID	Ins ID #	Ins Group #	Claim Offic	ce#	Plan Name	Insurance No	Default?			
Primary Professional		Aetna	60054	123456789						Yes	/ Ec	it 🖣	+ History
Secondary Professional										Yes	/ Ec	it 🖣	+ History
Primary Hospital										Yes	/ Ec	it 🖣	+ History
Secondary Hospital										Yes	/ Ec	it 🖣	+ History
			+ Primary Ins	+ Secondary	Ins + Auto Ace	cident Ins	+ Worker's	S Comp Ins	+ DME Ins				
Insurance History for Patient has no insurance his	or Sam story.	ple Insurance									Ado	l New	v History

5. To add another primary insurance select +Primary Ins.

Current Insurance Det	ails for Sample Insurand	ce <b>()</b>									
Insurance Type	Insurance company	Payer ID	Ins ID #	Ins Group #	Claim Office	#	Plan Name	Insurance Notes	Default?		
Primary Professional	Aetna	60054	123456789						Yes	🖋 Edit	+ History
Secondary Professional									Yes		+ History
Primary Hospital									Yes	🖋 Edit	+ History
Secondary Hospital									Yes	🖋 Edit	+ History
		+ Primary Ins	+ Secondary	Ins + Auto Acc	ident Ins	+ Worker's	Comp Ins +	DME Ins			
Insurance History for S Patient has no insurance history	Sample Insurance	1								Add N	ew History

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

Adding Primary	Insurance for Sample	e Insurance
Insurance Type	Primary Professional V	
Subscriber is the Patient	Insured person is the same person as the	e Patient
Insurance Company	Re	equired *contact support if you can't find an insurance company.
Carrier Payer ID	Re	equired
Alternate eligibility payer	+ "It"	's required when the insurance company set for claim submission is different from the actual patient's insurance
Tpl code		
Insurance ID Number		
Insurance group name	*if	available
Insurance group number	*if	available
Plan Name	*if	available
Plan Type	↓ *if	f available
Insurance claim office	*if	available
number		
Number visits allowed per		
Insurance Notes		
insurance notes		
Insurance Photo Front	Choose File No file chosen	
Insurance Photo Back	Choose File No file chosen	
~	Create Cancel	

7. Now, two primary insurances are listed for the patient, and the first insurance is listed as default.

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Current Insurance Details	for Sample Insurance	0								
Insurance Type	Insurance company	Payer ID	Ins ID #	Ins Group # 0	Claim Office #	Plan Name	Insurance Notes	Default?		
Primary Professional	Aetna	60054	123456789					Yes	/ Edit	+ History
Primary Professional	American Specialty Health	EPRNT8						No		× Delete
Secondary Professional								Yes	/ Edit	+ History
Primary Hospital								Yes		+ History
Secondary Hospital								Yes	/ Edit	+ History
		+ Primary Ins	+ Secondary Ins	+ Auto Accident	Ins + Worker's C	Comp Ins +	DME Ins			
Insurance History for San Patient has no insurance history.	nple Insurance								Add Ne	ew 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.

dr chrono	Schedule Appointment			inivasa Sai (srinivasasai) 🖞
Schedule Clin	Appointment Billing	Vitals Revisions Eligibility	r Flags Custom Data Com. Log MU Helper	▲ <u>•</u> <u>•</u> ≡
<b>O</b> Jun ▼ 2016 ▼			Patient SuperBill  Clinical Note Billing Details Other Forms	doctor weekly monthly
Su Mo Tu We Th Fr	Billing Status	<b>.</b>	HCFA Box 10 - Is patient's condition related to:	Exam 4
29 30 31 <b>1</b> 2 3	ICD Version	ICD-10	Employment No •	<b>^</b>
5 6 7 8 9 10	Primary Insurer	- Default -	Auto Accident No 🔻	
12 13 14 15 16 17	Secondary Insurer	- Default - Aetna	<b>v</b>	
26         27         28         29         30         1	Patient Payment	AARP MedicareComplete through	UnitedHealthcare/AARP MedicareComplete	
Print Appointments	Payment Notes		Onset date (HCFA Box #14)	
Doctors Select all / n	Payment Posted Date	06/29/2016	Initial visit date (HCFA Box #15)	
Robinson Grey	Referral #		Last related visit date (HCFA Box #19)	
Christopher Daniel	Payment profile			
Dr. Eugene Walsh	Billing Profile	· •		
Sriniyasa Sai	Billing Pick List	Choose Codes from Pick List		
	Diagnosis Pick List	Choose Codes from Pt Problems		
Offices Select all / n				<b></b>
EVIL SPECIALITY	ICD-10 Codes	Find Diagnosis codes	CPT Codes Find CPT Procedure codes	7//

- 10. Press 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	ICD-10	~
Primary Insurer	- Default -	~
Secondary Insurer	- Default -	~

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