

# Submitting Claims to Multiple Primary Insurances.

Last modified on 03/19/2026 10:10 am 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, 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 Jones**  
Female Gender Identity Unknown | 47 years old (08/23/1977)  
JOAM000001

Provider: [Randi Beavers](#) | Address: [123 Example Street, Sample City, 55555](#) | Phone: [\(555\) 555-1234](#) | Email: [daniel+amanda@drchrono.com](mailto:daniel+amanda@drchrono.com)  
OnPatient: [Not Enabled-Invite](#) | Date Added: 10/01/2024 | Prev Appt: 10/06/2024 | Next Appt: None

Adult Immunization Schedule Age: 27-49

**Demographics**

[Important](#) | [Demographics](#) | [Insurances](#) | [Authorizations](#) | [Smoking Status](#) | [Flags](#) | [Balance](#) | [DrChrono Payments](#)

[Primary Ins](#) | [Secondary Ins](#) | [Tertiary Ins](#) | [Primary Hospital](#) | [Secondary Hospital](#) | [Auto Accident](#) | [Worker's Comp](#) | [Durable Med Eqpt](#)

Default Primary Insurance | [Save to Insurance History](#) | [Manage Alternative Insurances & History](#)

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:

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

Default Primary Insurance [Save to Insurance History](#) [Manage Alternative Insurances & History](#)

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

Alternate Eligibility Payer  \*It's required when the insurance company set for claim submission is different from the actual patient's insurance

TPL Code  \*If the Medicaid is Secondary

Insurance ID Number

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

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

[Save Demographics](#)

### 3. Select Manage Alternative Insurances and History.

**Amanda Jones**  
Female Gender Identity Unknown | 47 years old (08/23/1977)  
JOAM000001

Provider [Randi Beavers](#) Address [123 Example Street, Sample City, 55555](#) Phone [\(555\) 555-1234](#) Email [daniel+amanda@drchrono.com](mailto:daniel+amanda@drchrono.com)  
OnPatient [Not Enabled-Invite](#) Date Added 10/01/2024 Prev Appt [10/06/2024](#) Next Appt None

Adult Immunization Schedule Age: 27-49

Patient Chart [Patient Summary](#) [Demographics](#) [Appointments](#) [Clinical Dashboard](#) [Documents](#) [Eligibility](#) [Tasks](#)

**Demographics**

[Important](#) [Demographics](#) [Insurances](#) [Authorizations](#) [Smoking Status](#) [Flags](#) [Balance](#) [DrChrono Payments](#)

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

Default Primary Insurance [Save to Insurance History](#) [Manage Alternative Insurances & History](#)

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

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

Current Insurance Details for Sample Insurance ⓘ

Insurance Type	Insurance company	Payer ID	Ins ID #	Ins Group #	Claim Office #	Plan Name	Insurance Notes	Default?	
Primary Professional	Aetna	60054	123456789					Yes	<a href="#">Edit</a> <a href="#">+ History</a>
Secondary Professional								Yes	<a href="#">Edit</a> <a href="#">+ History</a>
Primary Hospital								Yes	<a href="#">Edit</a> <a href="#">+ History</a>
Secondary Hospital								Yes	<a href="#">Edit</a> <a href="#">+ History</a>

[+ Primary Ins](#) [+ Secondary Ins](#) [+ Auto Accident Ins](#) [+ Worker's Comp Ins](#) [+ DME Ins](#)

Insurance History for Sample Insurance [Add New History](#)

Patient has no insurance history.

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

**Current Insurance Details for Sample Insurance**

Insurance Type	Insurance company	Payer ID	Ins ID #	Ins Group #	Claim Office #	Plan Name	Insurance Notes	Default?	
Primary Professional	Aetna	60054	123456789					Yes	<a href="#">Edit</a> <a href="#">+ History</a>
Secondary Professional								Yes	<a href="#">Edit</a> <a href="#">+ History</a>
Primary Hospital								Yes	<a href="#">Edit</a> <a href="#">+ History</a>
Secondary Hospital								Yes	<a href="#">Edit</a> <a href="#">+ History</a>

[+ Primary Ins](#)
[+ Secondary Ins](#)
[+ Auto Accident Ins](#)
[+ Worker's Comp Ins](#)
[+ DME Ins](#)

**Insurance History for Sample Insurance**  
Patient has no insurance history. [Add New History](#)

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

**Adding Primary Insurance for Sample Insurance**

Insurance Type:

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

Insurance Company:  **Required** \*contact support if you can't find an insurance company.

Carrier Payer ID:  **Required**

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 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

[Create](#) [Cancel](#)

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

**Current Insurance Details for Sample Insurance**

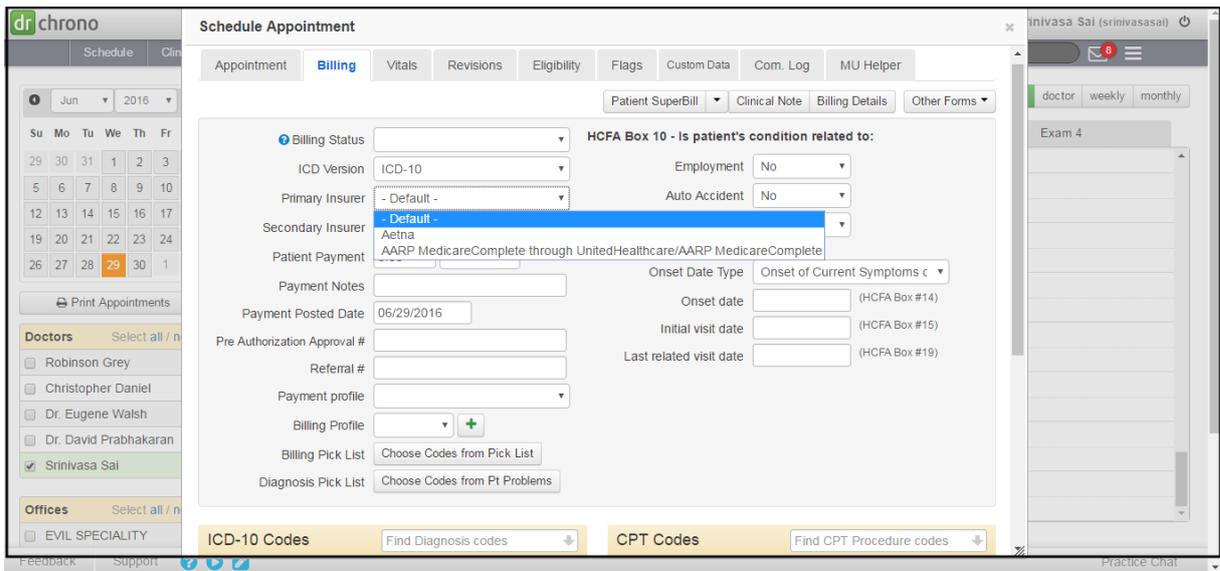
Insurance Type	Insurance company	Payer ID	Ins ID #	Ins Group #	Claim Office #	Plan Name	Insurance Notes	Default?	
Primary Professional	Aetna	60054	123456789					Yes	<a href="#">Edit</a> <a href="#">+ History</a>
Primary Professional	American Specialty Health	EPRINT8						No	<a href="#">Edit</a> <a href="#">Delete</a>
Secondary Professional								Yes	<a href="#">Edit</a> <a href="#">+ History</a>
Primary Hospital								Yes	<a href="#">Edit</a> <a href="#">+ History</a>
Secondary Hospital								Yes	<a href="#">Edit</a> <a href="#">+ History</a>

[+ Primary Ins](#)
[+ Secondary Ins](#)
[+ Auto Accident Ins](#)
[+ Worker's Comp Ins](#)
[+ DME Ins](#)

**Insurance History for Sample Insurance**  
Patient has no insurance history. [Add New History](#)

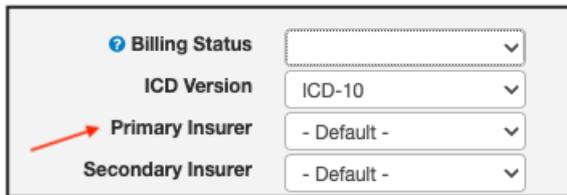
8. When the patient schedules an appointment, you will have 2 options under **Primary Insurer**.

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.



10. Press **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)



Here is a [video](#) that will walk you through working with multiple primary insurances.