

Submitting Claims to Multiple Primary Insurances.

Last modified on 12/18/2024 12:39 pm EST

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
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)
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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	Edit + History
Secondary Professional								Yes	Edit + History
Primary Hospital								Yes	Edit + History
Secondary Hospital								Yes	Edit + History

[+ 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	Edit + History
Secondary Professional								Yes	Edit + History
Primary Hospital								Yes	Edit + History
Secondary Hospital								Yes	Edit + History

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

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

Current Insurance Details for Sample Insurance

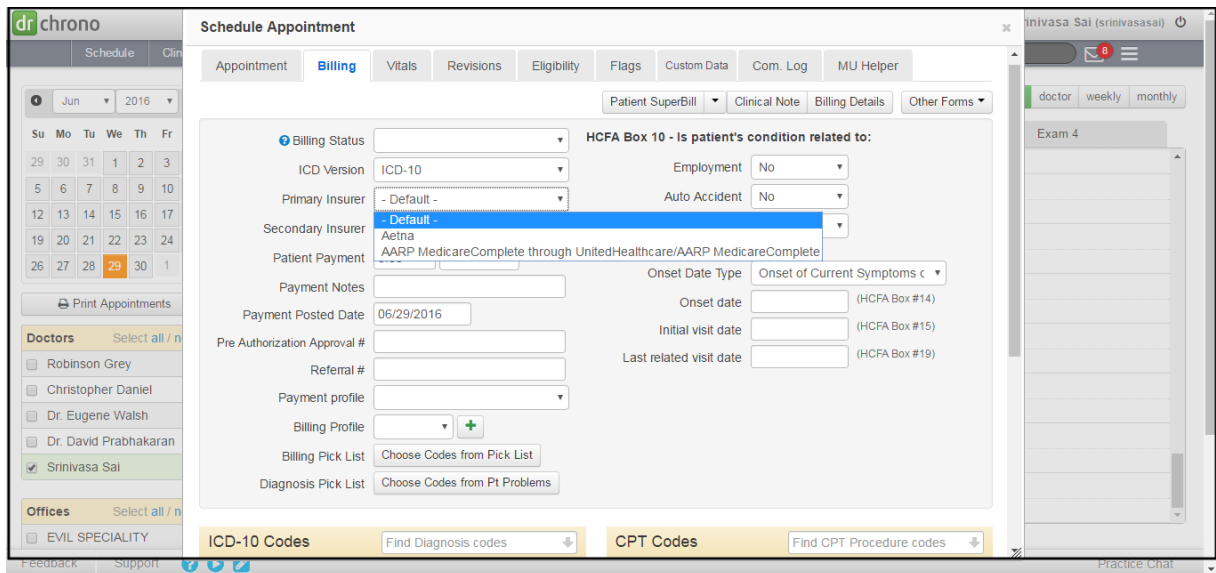
Insurance Type	Insurance company	Payer ID	Ins ID #	Ins Group #	Claim Office #	Plan Name	Insurance Notes	Default?	
Primary Professional	Aetna	60054	123456789					Yes	Edit + History
Primary Professional	American Specialty Health	EPRINT8						No	Edit Delete
Secondary Professional								Yes	Edit + History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

Insurance History for Sample Insurance
Patient has no insurance history.

[Add New History](#)

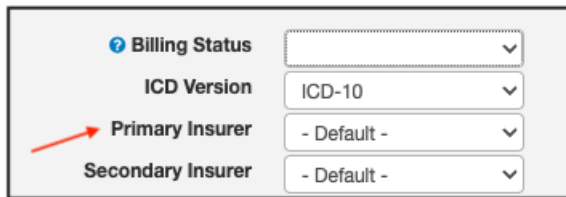
8. When the patient schedules an appointment, you will have 2 options under **Primary Insurer**.

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.