

Bulk Editing Payer IDs

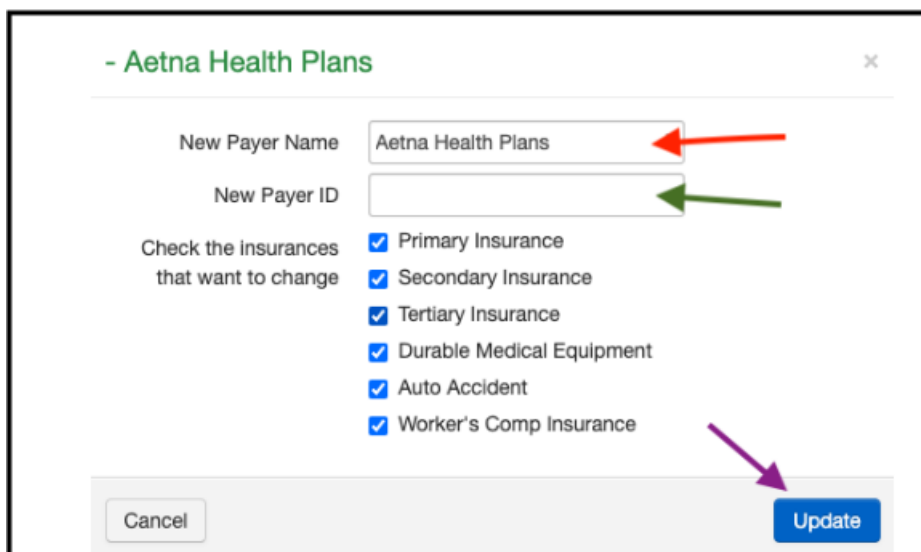
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Updating patient insurance in bulk

If you need to update the payer IDs on your patient charts, you can do so for all patients with a particular insurance at once. You don't have to update them one by one. The Bulk Edit Payer ID feature within DrChrono will make this task quicker and easier.

1. Navigate to **Billing > Bulk Edit Payer IDs**
2. Click on **Edit**

Each insurance that is listed on all of your patient charts will be listed on this screen. On the right, you will find an Edit button that will allow you to change the payer ID for all of your patients with this insurance, all at the same time.



The screenshot shows a modal window titled "- Aetna Health Plans" with a close button (X) in the top right corner. The form contains the following elements:

- New Payer Name:** A text input field containing "Aetna Health Plans". A red arrow points to this field.
- New Payer ID:** An empty text input field. A green arrow points to this field.
- Check the insurances that want to change:** A list of insurance types with checkboxes, all of which are checked:
 - Primary Insurance
 - Secondary Insurance
 - Tertiary Insurance
 - Durable Medical Equipment
 - Auto Accident
 - Worker's Comp Insurance
- Buttons:** A "Cancel" button on the left and an "Update" button on the right. A purple arrow points to the "Update" button.

- **Red arrow - New Payer Name** - You will search here for your new payer ID, and select from the drop-down
- **Green arrow - New Payer ID** - This shows the new ePS (eProvider Solutions) payer ID you selected above.
- **Check the insurances..** section - This is where you will select which insurance you would like to change. To change to ePS (eProvider Solutions), you will want to ensure that all are checked.
- **Purple arrow - Update** - Once you have updated the payer ID (green arrow), click on Update. The system will update all of the patient records with the payer ID you entered.

