

I've Updated the Patient's Insurance but it's not Reflecting in the Live Claims Feed

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When you update the insurance information in the patient's demographics, it will reflect the change for appointments you create in the future. It does not change them retroactively. To change the insurance information for appointments you have created in the past, you can manually update the appointments so they will bill the proper payer.

1. Update the patient's new insurance under the **Demographic tab > Primary Ins.**

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

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

2. To update the new insurance information on an already scheduled appointment, press **Verify & Save** inside the appointment in the Live Claims Feed. This will pull over the new payer information to the appointment.

Code/Check Date	Description	Mods/Posted Date	Service Date	Qty/Min	Dx Pointers	Price	Billed	Allowed	Adjmt	Ins 1 paid	Ins 2 paid	Pt Paid	Ins Bal	Pt Bal	Status/Adj Type
C 97110				1.00	1 0 0 0	175.00	\$175.00	\$175.00	\$0.00	\$0.00	\$0.00	\$0.00	\$175.00	\$0.00	Missing Information
Totals:							\$175.00	\$175.00	\$0.00	\$0.00	\$0.00	\$0.00	\$175.00	\$0.00	Not Submitted

+ Add Line Item - Delete Selected

Validate Claim Reparse ERA Claim Info **Verify & Save**

If there is a change in payer on a specific date (such as the first of the calendar or fiscal year), you can also use the **Save to Insurance** history option. This option will allow you the flexibility to continue to bill/work on claims with the previous payer, as well as bill claims to the new payer. You can find additional information on that feature [here](#).