

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.**

The screenshot shows the 'Primary Ins' form with the following fields and options:

- Subscriber is the Patient** Insured person is the same person as the Patient
- Insurance Company** (with a red arrow pointing to it) [Dropdown menu] *contact support if you can't find an insurance company.
- Carrier Payer ID** [Text input]
- Alternate Eligibility Payer** [Dropdown menu] *It's required when the insurance company set for claim submission is different from the actual patient's insurance
- TPL Code** [Text input] *If the Medicaid is Secondary
- Insurance ID Number** [Text input]
- Insurance group name** [Text input] *if available
- Insurance group number** [Text input] *if available
- Insurance plan name** [Dropdown menu] *if available
- Insurance plan type** [Dropdown menu] *if available
- Insurance claim office number** [Text input] *if available
- Number visits allowed per year** [Text input]
- Card issued date** [Text input] *Required for checking eligibility of CA Medicaid
- Primary Insurance Notes** [Text area]

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
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	Not Submitted

Buttons: + Add Line Item, x 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](#).

