

# 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.

This is how it could look if you have just updated a patient's insurance. The demographic section (top picture) shows Aetna as the patient's primary insurance, whereas, if you go into the Live Claims Feed (bottom picture) appointments may show the prior insurance Cigna.

The screenshot shows a form titled "Primary Insurance" with tabs for "Primary Ins", "Secondary Ins", "Tertiary Ins", "Auto Accident", "Worker's Comp", and "Durable Med Eqpt". The "Primary Insurance" tab is active. Below the tabs, there are two checkboxes: "Subscriber is the Patient" and "Insured person is the same person as the Patient", both of which are checked. A red box highlights the "Insurance Company" dropdown menu, which currently displays "Aetna". Below this, there are several input fields: "Carrier Payer ID" (60054), "TPL Code", "Insurance ID Number" (987654321), "Insurance group name", "Insurance group number", "Insurance plan name", "Insurance plan type", "Insurance claim office number", and "Number visits allowed per year".

The screenshot shows a table titled "Live Claims Feed" with a header row containing various columns: Info, Claim ID, Patient, Date of Service, Office, Provider, Billed, Allowed, Adjmt, Ins 1 Paid, Ins 2 Paid, Pt Paid, Ins Bal, Pt Bal, Claim Bal, Exp Reimbr, Ins 1 Status, Ins 2 Status, First EDI, Last EDI, Service Notes, and Billing Note. The table contains three rows of data, each representing a claim. The first row has a Claim ID of 26855628, Patient Eugene Walsh, Date of Service 3/10/2016, Office EVIL SPECIALITY, Provider Dr. Eugene Walsh, Billed \$230.00, Allowed \$230.00, Adjmt \$0.00, Ins 1 Paid \$79.31, Ins 2 Paid \$0.00, Pt Paid \$3,010.00, Ins Bal \$797.00, Pt Bal (\$950.00), Claim Bal (\$153.00), Exp Reimbr \$55.00, Ins 1 Status CIGNA, and Ins 2 Status Not submitted. The second row has a Claim ID of 26820396, Patient Eugene Walsh, Date of Service 3/09/2016, Office EVIL SPECIALITY, Provider Dr. Eugene Walsh, Billed \$0.00, Allowed \$0.00, Adjmt \$0.00, Ins 1 Paid \$0.00, Ins 2 Paid \$0.00, Pt Paid \$0.00, Ins Bal \$0.00, Pt Bal \$0.00, Claim Bal \$0.00, Exp Reimbr \$0.00, Ins 1 Status CIGNA, and Ins 2 Status Not submitted. The third row has a Claim ID of 26784252, Patient Eugene Walsh, Date of Service 3/08/2016, Office EVIL SPECIALITY, Provider Dr. Eugene Walsh, Billed \$0.00, Allowed \$0.00, Adjmt \$0.00, Ins 1 Paid \$0.00, Ins 2 Paid \$0.00, Pt Paid \$0.00, Ins Bal \$0.00, Pt Bal \$0.00, Claim Bal \$0.00, Exp Reimbr \$0.00, Ins 1 Status CIGNA, and Ins 2 Status Not submitted. A red box highlights the "CIGNA" status in the Ins 1 Status column for all three rows.

Here is how you can manually update it:

1. Navigate to **Billing > Live Claims Feed**. Select the patient and click on the Visit date. This will direct you to the **Billing Detail** screen.

2. To update the new insurance information on the appointment, simply click on **Verify & Save**. This will pull over the new payer information to the appointment.

The screenshot shows the 'Billing Detail' screen. At the top, it displays 'Patient's unallocated payment \$475.80' and 'Primary Insurer: (60054) Aetna'. Below this, there are two sections for ICD codes: 'ICD-10' and 'ICD-9 to Convert'. The 'ICD-10' section shows a code 'G43.C0' for 'Periodic headache syndromes in child or adult, not intractable'. The 'ICD-9 to Convert' section shows codes '001' for 'CHOLERA' and '784.0' for 'HEADACHE', each with a 'Convert to ICD-10' button. A summary table at the bottom shows 'Totals' for billed, allowed, and paid amounts. A 'Verify & Save' button is highlighted with a red box at the bottom right.

Info	Claim ID	Patient	Date of Service	Office	Provider	Billed	Allowed	Adjmt	Ins 1 Paid	Ins 2 Paid	Pt Paid	Ins Bal	Pt Bal	Claim Bal	Exp Reimbr	Ins 1	Ins 1 Status	Ins 2	Ins 2 Status	First EDI	Last EDI		
Totals:						\$3,092.00	\$2,936.31	\$155.69	\$79.31	\$0.00	\$3,010.00	\$797.00	(\$950.00)	(\$153.00)	\$55.00								
	26874967	Eugene Walsh	3/11/2016 09:00AM	EVIL SPECIALITY	Dr. Eugene Walsh	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Aetna	▲ Not submitted						
	26855628	Eugene Walsh	3/10/2016 09:00AM	EVIL SPECIALITY	Dr. Eugene Walsh	\$230.00	\$230.00	\$0.00	\$0.00	\$0.00	\$0.00	\$230.00	\$0.00	\$230.00	\$5.00	Aetna	▲ Not submitted						
	26820396	Eugene Walsh	3/09/2016 09:00AM	EVIL SPECIALITY	Dr. Eugene Walsh	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	CIGNA	▲ Not submitted						
	26784252	Eugene Walsh	3/08/2016 09:00AM	EVIL SPECIALITY	Dr. Eugene Walsh	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	CIGNA	▲ Not submitted						

The above method would work if the original payer was incorrect.

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](#).