## How do I keep a patient's insurance history?

08/23/2024 10:49 am EDT

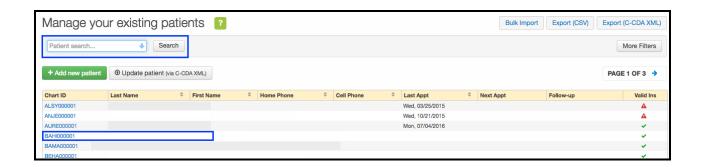
## **Patient Insurance History**

Historical insurance information may be needed to bill correctly for previous appointments. Appointments are automatically associated with the active insurance on the date of service.

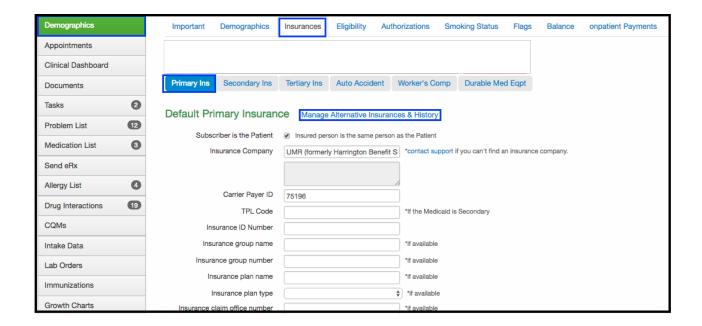
\*\*\* **NOTE**: When you edit a patient's current insurance information, the old information is **NOT** automatically archived. You must first archive the current information, and then edit the information for it to save in the patient's insurance history. \*\*\*

Please follow the below instructions to save the patient's previous insurance information to their insurance history section:

- 1. Hover over the Patient and choose Patient List
- 2. Search for the patient's chart by entering the Patient's name or Chart ID in the Patient search field.

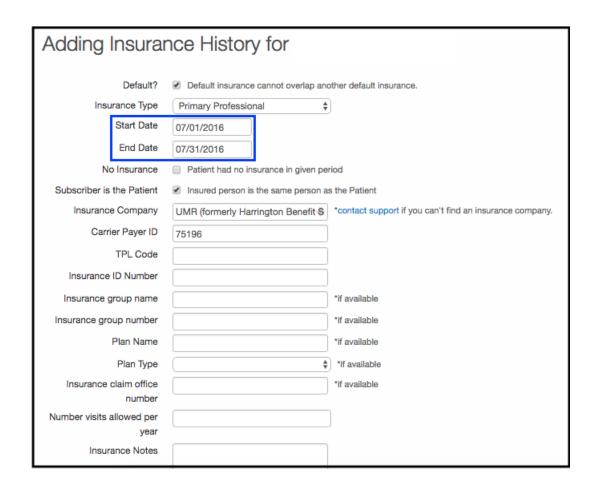


3. In the patient demographics, click on the **Insurance** section and then click on **Manage Alternative Insurances & History**.



4. In the Insurance history section, click on + History to add the previous insurance to the history section. With the effective dates listed as **Start date/End date**, any appointment that needs to be submitted that falls within that range will be submitted with the previous insurance information, not what is listed as the patient's current insurance.





5. Additional previous insurance information can be added to the history section by using the + Primary Ins, + Secondary Ins, + Auto Accident Ins, + Worker's Comp Ins & + DME Ins buttons.

