

How do I keep a patient's insurance history?

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

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

Chart ID	Provider	Last Name	First Name	Home Phone	Cell Phone	Last Appt	Next Appt	Follow-up	Valid Ins
ADT1000001									
AMTA000001									

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

Important Demographics **Insurance** 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

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.

Current Insurance Details

Insurance Type	Insurance company	Payer ID	Ins ID #	Ins Group #	Claim Office #	Plan Name	Insurance Notes	Default?	
Primary Professional							None	Yes	Edit + History
Secondary Professional							None	Yes	Edit + History
Primary Hospital								Yes	Edit + History
Secondary Hospital								Yes	Edit + History

+ Primary Ins

+ Secondary Ins

+ Auto Accident Ins

+ Worker's Comp Ins

+ DME Ins

Adding Insurance History

Default?

☒ Default insurance cannot overlap another default insurance.

Insurance Type

Primary Professional

Start Date

End Date

Required

No Insurance

☐ Patient had no insurance in given period

Subscriber is the Patient

☒ Insured person is the same person as the Patient

Insurance Company

Required

*contact support if you can't find an insurance company.

Carrier Payer ID

Required

Alternate eligibility payer

*It's required when the insurance company set for claim submission is different from the actual patient's insurance

TPL Code

Insurance ID Number

Insurance group name

*if available

Insurance group number

*if available

Plan Name

*if available

Plan Type

*if available

Insurance claim office number

*if available

Number visits allowed per year

Insurance Notes

Submit

Cancel

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.

Current Insurance Details

Insurance Type	Insurance company	Payer ID	Ins ID #	Ins Group #	Claim Office #	Plan Name	Insurance Notes	Default?	
Primary Professional							None	Yes	Edit + History
Secondary Professional							None	Yes	Edit + History
Primary Hospital								Yes	Edit + History
Secondary Hospital								Yes	Edit + History

+ Primary Ins

+ Secondary Ins

+ Auto Accident Ins

+ Worker's Comp Ins

+ DME Ins