How do I keep a patient's insurance history?

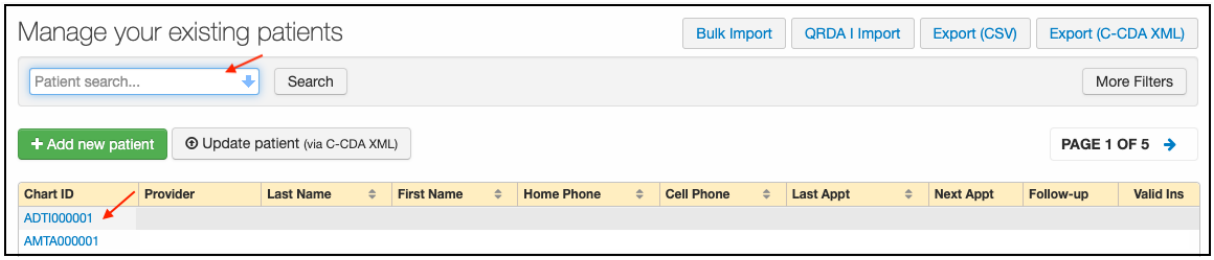
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Historical insurance information may be needed to bill correctly for previous appointments. Appointments are automatically associated with the active insurance on the date of service.

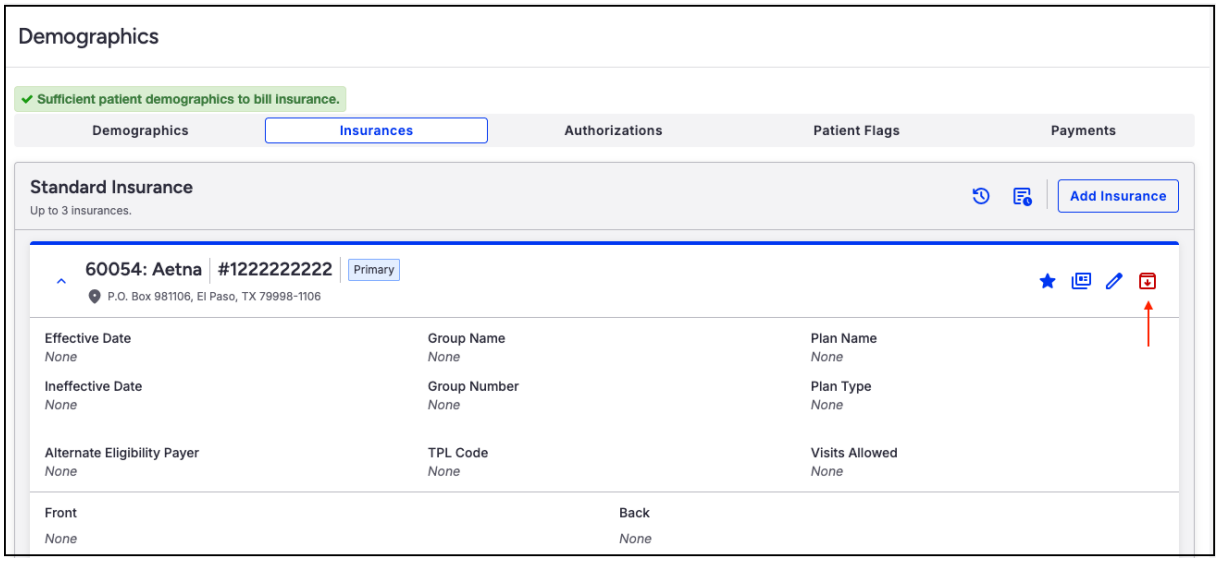
> When you edit a patient's current insurance information, the old information is***NOT*** automatically archived. You must first archive the current information, and then edit the information for it to save in the patient's insurance history.

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

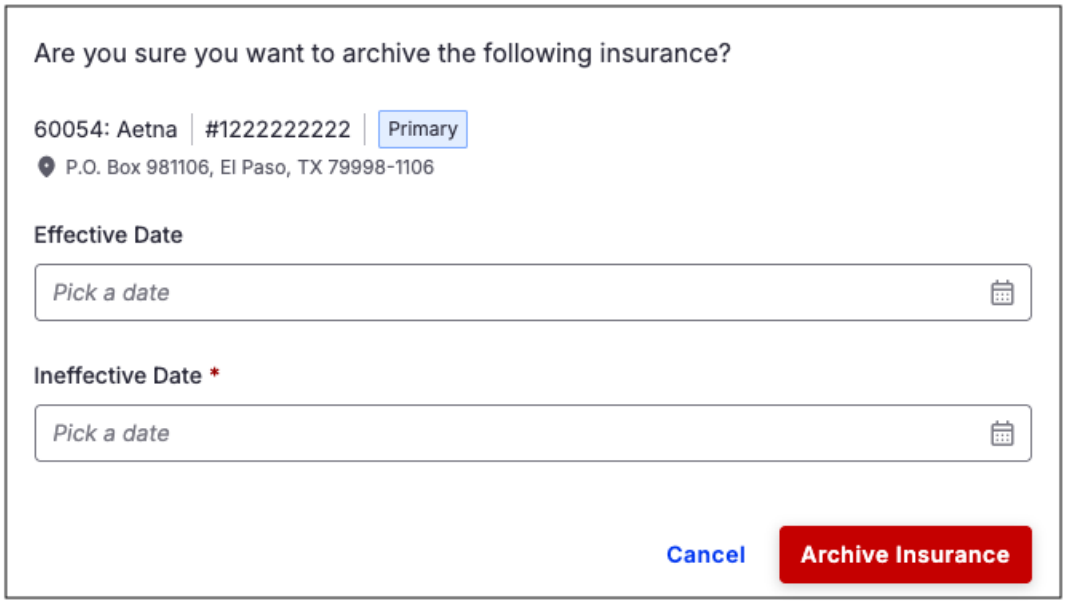
1. Hover over the **Patient** and select **Patient List**
2. Search for the patient's chart by entering the Patient's name or Chart ID in the **Patient search** field.



3. Under the Demographics section, press the red square on the right of the screen.



4. A pop-up box will allow you to enter a start (effective) date and an end (ineffective) date for the payer. Adding accurate information in these fields will allow claims to bill to the correct payer if they need to be rebilled for some reason.



5. Once the Effective/Ineffective Date are entered, press **Archive Insurance**.