

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

Last modified on 11/18/2024 9:09 am EST

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

Manage your existing patients

Bulk Import QRDA I Import Export (CSV) Export (C-CDA XML)

Patient search... Search More Filters

+ Add new patient Update patient (via C-CDA XML) PAGE 1 OF 5

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 Insurances 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	<a href="#">Edit</a> <a href="#">+ History</a>
Secondary Professional							None	Yes	<a href="#">Edit</a> <a href="#">+ History</a>
Primary Hospital								Yes	<a href="#">Edit</a> <a href="#">+ History</a>
Secondary Hospital								Yes	<a href="#">Edit</a> <a href="#">+ History</a>

[+ 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:

Start Date:  **Required**

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	<a href="#">Edit</a> <a href="#">+ History</a>
Secondary Professional							None	Yes	<a href="#">Edit</a> <a href="#">+ History</a>
Primary Hospital								Yes	<a href="#">Edit</a> <a href="#">+ History</a>
Secondary Hospital								Yes	<a href="#">Edit</a> <a href="#">+ History</a>

[+ Primary Ins](#)
[+ Secondary Ins](#)
[+ Auto Accident Ins](#)
[+ Worker's Comp Ins](#)
[+ DME Ins](#)