

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.

| Chart ID | Last Name | First Name | Home Phone | Cell Phone | Last Appt | Next Appt | Follow-up | Valid Ins |
|------------|-----------|------------|------------|------------|-----------------|-----------|-----------|-----------|
| ALSY000001 | | | | | Wed, 03/25/2015 | | | ▲ |
| ANJE000001 | | | | | Wed, 10/21/2015 | | | ▲ |
| AURE000001 | | | | | Mon, 07/04/2016 | | | ▲ |
| BAH000001 | | | | | | | | ✓ |
| BAMA000001 | | | | | | | | ✓ |
| BEHA000001 | | | | | | | | ✓ |

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

Demographics | Important | Demographics | **Insurances** | Eligibility | Authorizations | Smoking Status | Flags | Balance | onpatient Payments

Appointments | Clinical Dashboard | Documents | Tasks (2) | Problem List (12) | Medication List (3) | Send eRx | Allergy List (4) | Drug Interactions (19) | CQMs | Intake Data | Lab Orders | Immunizations | Growth Charts

Primary Ins | Secondary Ins | Tertiary Ins | Auto Accident | Worker's Comp | Durable Med Eqpt

Default Primary Insurance | [Manage Alternative Insurances & History](#)

Subscriber is the Patient Insured person is the same person as the Patient

Insurance Company: UMR (formerly Harrington Benefit S) *contact support if you can't find an insurance company.

Carrier Payer ID: 75196

TPL Code: [] *If the Medicaid is Secondary

Insurance ID Number: []

Insurance group name: [] *if available

Insurance group number: [] *if available

Insurance plan name: [] *if available

Insurance plan type: [] *if available

Insurance claim office number: [] *if available

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 for ⓘ

| Insurance Type | Insurance company | Payer ID | Ins ID # | Ins Group # | Claim Office # | Plan Name | Insurance Notes | Default? | |
|------------------------|--|----------|----------|-------------|----------------|-----------|-----------------|----------|--|
| Primary Professional | UMR (formerly Harrington Benefit Services - Westerville) | 75196 | | | | | | Yes | Edit + History |
| Secondary Professional | | | | | | | | Yes | Edit + History |

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

Adding Insurance History for

Default? Default insurance cannot overlap another default insurance.

Insurance Type

Start Date

End Date

No Insurance Patient had no insurance in given period

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

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

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.

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| Primary Professional | UMR (formerly Harrington Benefit Services - Westerville) | 75196 | | | | | | Yes | Edit + History |
| Secondary Professional | | | | | | | | Yes | Edit + History |