

# How to Add, Edit, and Archive Patient Insurance

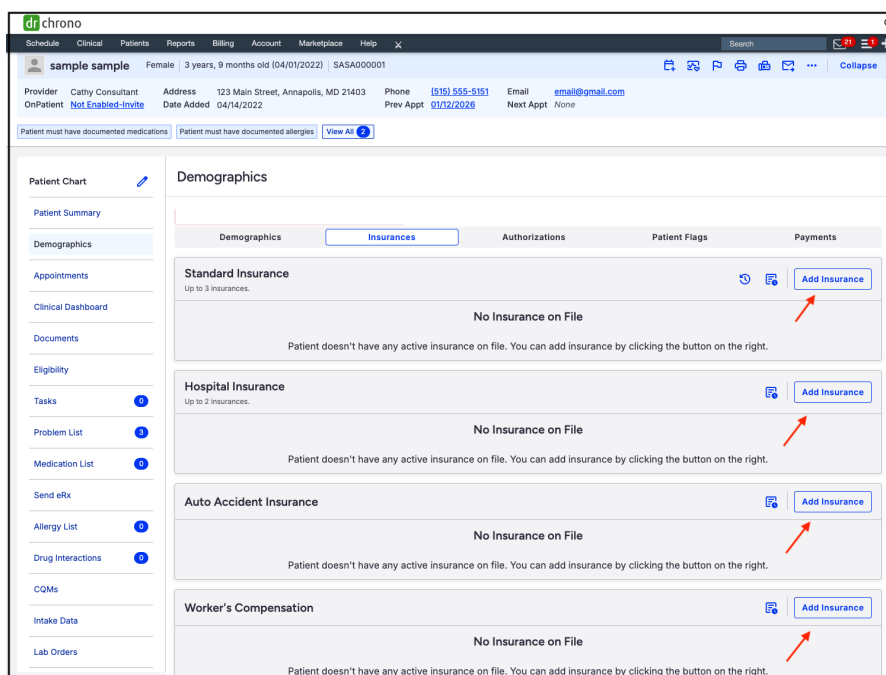
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Accurately managing patients' insurance is critical to smooth check-in and successful billing. The steps below show how to add new insurance, update existing insurance details, and archive inactive insurance records. Following these steps helps ensure insurance information stays current, organized, and audit-ready.

[Add Insurance](#) | [Edit Insurance](#) | [Archive Insurance](#)

## Adding an Insurance

1. Navigate to the patient's chart > Demographics > Insurances tab.
2. Press Add Insurance in the row that corresponds to the type of insurance (Standard, Hospital, Auto Accident, Worker's Compensation, DME).



3. The screen allows the addition of insurance information. The red stars next to Insurance Priority, Insurance (Payer ID), and Insurance ID (Patient's insurance id number) designate them as required fields.
4. When adding a payer, there will be an option to create a new payer. Please note that this option will create a paper claim, even if the payer has an electronic payer ID.

Add Standard Insurance

**Insurance Info**

Insurance Priority \*
  
Primary Insurance

Insurance \*
  
Search...

Insurance ID \*

Phone

Effective Date ⓘ
  
MM/DD/YYYY

Ineffective Date
  
MM/DD/YYYY

Group Name

Group Number

Plan Name

Plan Type
  
Search...

Alternate Eligibility Payer ⓘ
  
Search...

TPL Code ⓘ

Visits Allowed
  
per year

Note

- a. **Insurance Priority** -Select Primary, Secondary, Tertiary Insurance for the payer added.
- b. **Insurance** - Type the payer's name or Payer ID. As you type, the system will offer options.
- c. **Insurance ID** - Enter the patient's insurance ID from their insurance card.
- d. **Phone** - Enter the phone number for the payer.
- e. **Effective/Ineffective Date** - Enter the effective date of the insurance coverage.
- f. **Group Name/Number** - Enter the group name and phone number for the insurance company.
- g. **Plan Name/Type** - Enter the plan name and plan type for the insurance coverage.
- h. **Alternate Eligibility Payer** - For use where the eligibility information comes from one company, and the claim goes to another payer for processing. This scenario is most common in the chiropractic and mental health fields.
- i. **TPL Code** - Identifies other insurance or responsible parties (like private insurance, Workers' Comp) that must pay for a patient's medical care before Medicaid or other primary payers do.
- j. **Visits Allowed** - Enter the number of visits allowed per year, if applicable.
- k. **Notes** - Enter any applicable notes.

Add Standard Insurance

Insurance Photo

Front

Max file size is 25 MB. Accept .bmp, .gif, .jpeg, .pdf, .png, .tiff files.

Choose File

or drop here

No file selected

Back

Max file size is 25 MB. Accept .bmp, .gif, .jpeg, .pdf, .png, .tiff files.

Choose File

or drop here

No file selected

Subscriber

☐ Patient is the subscriber.

First Name

Last Name

Middle Name

Suffix

Date of Birth

MM/DD/YYYY

Sex

Search...

SSN

Relationship

Search...

Phone

Country

United States

Street Address

City

State

Search...

ZIP Code

l. **Insurance Photo** - Select the insurance card image from the device, or drag and drop it into the blue box. Acceptable image files include: .bmp, .gif, .jpeg, .pdf, .png, .tiff.

m. **Subscriber** - If the patient is the subscriber, check the box. If the patient is not the subscriber, fill in the fields for the subscriber.

HCFA Options

Default Onset Date

HCFA Box #14

MM/DD/YYYY

Default Initial Visit Date

HCFA Box #15

MM/DD/YYYY

Pre-populate Last Related Visit

HCFA Box #19

☐ Yes, pre-populate last related visit.
☒ No, do not pre-populate last related visit.

Cancel

Add Insurance

n. **HCFA Options** - Here you can set dates that will populate in HCFA claim forms in boxes 14 and 15.

i. Default Onset Date - HCFA box 14

ii. Default Initial Visit Date - HCFA box 15

o. **Pre-Populate Last Related Visit**

i. Select whether or not to include the last related visit on the HCFA form in box 19.

5. Press Add Insurance on the bottom right of the screen to save.

6. Once saved, the entry will reflect the information entered.

7. In the top right, the icons are:

- a. Star - Defaults the insurance as the primary payer for the patient
- b. Dual Cards -Runs the eligibility and benefit coverage check
- c. Pencil - Allows updating/changing of the information listed
- d. Red Folder - Allows archiving of the payer when the patient's coverage ends.

87726: Unitedhealthcare

#122222222

Primary

PO Box 5240, Kingston, NY 12402-5240

★

Effective Date

01/01/2026

Group Name

None

Plan Name

None

Ineffective Date

None

Group Number

123456

Plan Type

Commercial Insurance Co.

Alternate Eligibility Payer

None

TPL Code

None

Visits Allowed

None

Front

Back

Subscriber

Patient is the subscriber.

HCFA Options

Default Onset Date

None

Default Initial Visit Date

None

Pre-populate Last Related Visit

No

Insurance Info

To view the current enrollment status for the payer, [click here](#).

	Claims	Remittance	Eligibility
Service Type	✓	✓	✓
Enrollment Required		✓	

8. Insurance Info - The chart identifies services available through the clearinghouse ePS for the payer. If enrollment is required for claims (837), Remittance (ERA/835), or Eligibility (270), it will be notated on the bottom row.

## Editing an Insurance

- Navigate to the patient's chart > Demographics > Insurances tab.
- Press the down arrow to expose the payer information that needs editing.

**Standard Insurance**  
Up to 3 Insurances.

Add Insurance

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PO Box 5240, Kingston, NY 12402-5240

3. Press the blue pencil on the right side of the screen.

**87726: Unitedhealthcare** | #1222222222 | Primary

PO Box 5240, Kingston, NY 12402-5240

Effective Date	Group Name	Plan Name
01/01/2026	None	None
Ineffective Date	Group Number	Plan Type
None	123456	Commercial Insurance Co.
Alternate Eligibility Payer	TPL Code	Visits Allowed
None	None	None

4. The edit screen will open so updates can be made.

Edit Standard Insurance

**Insurance Info**

Insurance Priority \*  
Primary Insurance

Insurance \*  
87726: Unitedhealthcare

Primary Address: PO Box 5240, Kingston, NY 12402-5240 | [Use Alternate Address Instead](#)

Insurance ID \*  
1222222222

Phone

Effective Date ⓘ  
01/01/2026

Ineffective Date  
MM/DD/YYYY

Group Name

Group Number  
123456

Plan Name

Plan Type  
Commercial Insurance Co.

Alternate Eligibility Payer ⓘ  
Search...

TPL Code ⓘ

Visits Allowed  
per year

5. Press Save Insurance on the bottom right side of the screen to save the updates.

## Archive Insurance

1. Navigate to the patient's chart > Demographics > Insurances tab.
2. Press the down arrow to expose the payer that needs archiving.

### Standard Insurance

Up to 3 insurances.

[Add Insurance](#)

**87726: Unitedhealthcare** | **#1222222222** | Primary

PO Box 5240, Kingston, NY 12402-5240

- Press the red folder on the right side of the screen.

**87726: Unitedhealthcare** | **#1222222222** | Primary

PO Box 5240, Kingston, NY 12402-5240

<b>Effective Date</b> 01/01/2026	<b>Group Name</b> None	<b>Plan Name</b> None
<b>Ineffective Date</b> None	<b>Group Number</b> 123456	<b>Plan Type</b> Commercial Insurance Co.
<b>Alternate Eligibility Payer</b> None	<b>TPL Code</b> None	<b>Visits Allowed</b> None

- A confirmation message will prompt entry of an ineffective date and confirmation that the payer should be archived and moved to the patient's insurance history.

### Are you sure you want to archive the following insurance?

**87726: Unitedhealthcare** | **#1222222222** | Primary

PO Box 5240, Kingston, NY 12402-5240

**Effective Date**

**Ineffective Date \***

[Cancel](#)
[Archive Insurance](#)