

Insurance Questions Configuration Guide

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The **Insurance Questions** module lets FrontOffice+ request, gather, and automatically update patient health insurance details and Social Security numbers (SSNs) during the scheduling process. Its primary goal is to automate pre-visit coverage data collection, reducing manual front desk workload and updating patient records directly in your EHR.

Key configuration options

Insurance card collection

- **Gather Insurance Card Photo:** Turn on to prompt patients for front and back photos of their insurance card.
- **Gather Insurance Card Text:** Custom message prompt used when requesting insurance card photos.
- **Mandatory Insurance Card Photo:** Makes uploading insurance card photos mandatory.

SSN collection

- **Gather Social Security Number (SSN):** Turn on to request the patient's Social Security number.
- **Gather Social Security Number (SSN) Text:** Custom message prompt used when requesting the patient's SSN.
- **Insurance/SSN Workflow Type:** Use this dropdown to specify whether collecting insurance card and SSN details is mandatory, optional, or excluded.



This feature might require advanced view permissions.

Extended insurance information

- **Gather Extended Insurance Information:** Turns on collection of additional coverage details, such as insurance company, plan type, Member ID, Group ID, and payer ID.
- **Visible Insurance Fields:** Use this multi-select menu to choose which fields appear in the web scheduler.
- **Required Insurance Fields:** Use this multi-select menu to choose which extended insurance fields the patient must fill out.
- **Use Pre-Configured Insurance List:** If turned on, you can create a custom insurance **Plan Type** list.
- **Insurance Information Notification Text:** A custom disclaimer or informational text shown on the web scheduler when extended insurance information questions appear.

Example

- **Scenario:** A clinic wants to optionally gather insurance card photos and Member IDs for prior verification before visits.
- **Setup:** Turn on **Gather Insurance Card Photo** and **Gather Extended Insurance Information**. Turn off **Mandatory Insurance Card Photo** and select **Member ID** under **Visible Insurance Fields** for extended insurance information.
- **Outcome:** Patients booking through the web scheduler can upload their insurance card images and enter

their Member ID before finalizing their appointment.

Before going live

Confirm:

- **Workflow requirement: Mandatory Insurance Card Photo** (mandatory vs. optional) is chosen appropriately to avoid booking drop-offs if patients don't have their card on hand.



If you require further assistance, contact our Customer Support team via in-app chat, email us at support@drchrono.com, or call us at (844) 569-8628.
