Introduction to Insurance Management

We use this feature to manage all the responsible parties for an encounter / charge and make changes to the profiles and rebill. This allows us the flexibility to maintaining multiple profiles for each patient. For instance, commercial insurance and workers comp or recently expired and current insurance.

What is a Profile? What is a Policy?

A **Policy** represents an insurance card. The Insurance, policy number, group number, policy holder, copay etc.

A **Profile** represents *all* the Insurances, Primary, Secondary, Tertiary *and* the ultimate Patient Responsibility. Patient Responsibility is a simple flag, 'Responsible' means the Guarantor will receive a statement, 'Not Responsible' means the guarantor will NOT receive a statement.

How is Default and/or Active used?

Default Profile is automatically assigned when registering a patient. This is the most likely used.All new Encounters have the default profile, although it can be overridden.

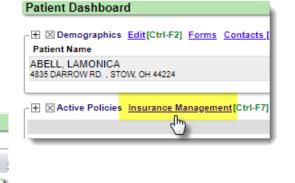
Active Profile, indicates it is available to be selected during Charge entry. This is useful for workers compensation and auto accident claims.

Profiles

How do I add a Profile to an existing patient? Click Insurance Management from the Patient Dashboard

Click [Add New Insurance Profile]





In the Popup

- 1. Click 'Add New'
- 2. Add Policy
- 3. [Save]

surance Management	Show Me How	Patient: <u>6472</u>	Name: ABE	ELL, LAMONICA
nsurance Profiles				
Default	Add/Modify Policy	Patient: 6472 Name:	ABELL, LAMO	NICA
Add New, From Existing, or Dra	Insurance/Policy Insurance Effective (?)			
Profile Note Save as Billing Note	2 ddress ID (?) Expiration (?)			
	Policy (?)	ip Group I	Vame .	Copay (?
Save [F2] Cancel		ip Oloubi	tame	C <u>o</u> pay (i
	Assignment Plan (?)	Product (?)		re Secondary Reaso
Add Self Pay Profile No Default Profile	Yes ▼ - SELECT - Eligibility Payer ID (?)	Select Insurance	▼ - SELE	ECT -
	Insured Relationship Relationship (?) 18 P SELF			

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4. After primary policy is saved, 'Secondary' section opens. If applicable 'Add New' - Secondary> Save , 'Add New' Tertiary > Save

5. After all the policy are added [Save] the profile

Insurance Pr	ofiles	
Default	Primary	Secondary
	X UHC [104] (866) 230-5740 Policy: 999999 Group:	Add New, From Existing, or Drag and Drop here
Profile No	te 🛛 Save as Billing Note	4
Save [F2]	5 icel	

How do I add a Secondary to an existing profile?

On the Insurance Management page, Click on the word 'Default' or 'Active' of the profile you need to add to

Add New Insurance Profile Add Self Pay Profile	Click Default to add the sec	condary		Active Profiles [1] @	Include Inactive Profi
Status Encounters Default 2 MEDICARE [MCR] (85	Primary 5) 252-8782 Group:	Secondary	Tertiary		Effective Expiration
Policie Click to edit Insurance Profile Add New Policy that i		are no records available			
 Click 'Add New' or from Ex In the Popup to add/edit Po You may also add Tertiary 	olicy information > [Sa	-	Add <u>N</u> ew , From	Existing, or Dr Nev	the pop-up to Ad or From Existing olicy information
the changes affect encounters a		y special		Insurance/Policy Insurance Address ID Policy	Effective Expiration
ttention if you want to rebill at this					
	Patient: <u>2643</u>	7 Encoun	ter: <u>35568</u>	Name:	
nsurance Management					
Insurance Profiles	lv allowable function.				
Insurance Profiles Charges exist on this profile. Addition of policies is the or Default Primary	Secondary DICA [MCD] Add New From	Tertiary n E <u>x</u> isting, or Drag and	l Drop here 🥬	Patient ♥ Responsible ▼	Effective

• Save the new profile

How do I delete an Insurance Profile?

From 'Insurance Management' (Patient Dashboard > Insurance Management)

- Click on the Red 'X' above the **word** 'Default' or 'Active'. A confirmation will open above, enter the reason for deletion then click [Delete]
- Note: A profile can *only* be deleted if there are no Encounters linked with the profile.

Insurance M	lanagement		Patient: <u>8705</u>	Name: DYLA	N, ROBERTA			
Insurance Prof	iles							
Are you sure y	ou want to delete	this Profile? The associated Policies may be pla	iced in the 'Policies not part of	an Insurance Pro	ofile' section to delete or f	to be used in an	other Profile	
Please Enter Reason: INCORRECT patient ID								
Cancel De	Cancel Delete							
Add New Insu	rance Profile Ad	dd Self Pay Profile			Active Profiles [2]	Include In	active Pro	
Status	Encounters	Primary	Secondary	Tertiary	Patient	Effective	Expirat	
Defr	<u>0</u>	<u>MED [109]</u> (877) 847-4992 Policy: XXXXXXXXA Group:			Responsible			
Delet Active	te this Profile	AETNA [103] (888) 632-3862 Policy: W1999999999999 Group:			Responsible			
Policies not pa	art of an Insurance	Profile Add New Policy that is not part of a Profi	ile				,	

Once the *Profile* is deleted, the *Policies* that made up the profile drop into the 'Policies not part of an Insurance Profile' area. This gives the user the opportunity to reassign the policies into a different profile or delete them.

How do I expire a secondary?

I have a profile, the primary is still active, however the secondary is now expired.

1. Expire the secondary

0	Click on the policy	Find Patient/Guarantor > Patient Dashboard			
	. ,	Insurance Management	Show Me How	Patient: <u>8788</u>	Name: O
2.		Add New Insurance Profile Add Self Pay Profile		1	
	 Save 	Status Encounters Created	Primary	*	Secondary
	Add	d/Modify Policy	Patient: 8788 10000: 907854		SO [MC] (855) 252- Received a second
	Insu MC		cy was in effect		
3.	Add a NEW Profile	dress ID (7)	Insurance P	-	elf Pay Profile
4.	Choose from Existing	g for the Primary if it is still a	active Status	Enco	nce Profile [Alt + A]
		Insurance Management	sting, pr Dra	licies ear 🗟 💁 Insurance	

5. Add a new secondary, with effective date or if Save the new profile

Policy

How do I delete an Insurance Policy?

After you delete the profile, we drop the policy information into the 'bank' or 'Policies not part of an Insurance Profile' section.

Click the Red 'X' to delete the Policies from the 'Policies not part of an Insurance Profile' area

	Add New Insurance Profile							
	Status	Encounters		Prime			Terti	
t	× <u>Default</u>	2	AETNA [103] (8) Policy: W19999995. Click the 'X' to completely delete Policy			ete the		
	– Policies not pa	rt of an Insuranc	e Profile Add New 7		art of a Profile			
		line -	C	Po	licy Holder	1	Relationship	
	XMEDIC	CARE [109]		DYLAN, ROBE	RTA	SELF		
	Highlig Delete	e this Unassigne	d Policy ers	e Expiration	Billing Addres	ç		

How should I use the section Add New Policy that is not part of a Profile?

This is used as a 'bank' or holding card for policy information we may use at a future date. For instance, the client has an HMO Medicare replacement product, but has given us their Medicare card too. We may want to save the Medicare policy to use later once we determine the correct coverage. When we delete an Insurance,

it falls to this 'bank' area, in case we simply need to add it to a different profile.

Insurance Management Patient: 70864 Insurance Profiles Add New Insurance Profile Add Self Pay Profile No Default Profile Specified There are no Policies not part of an Insurance Profile Add New Policy that is not part of a Profile There are no

How do I edit policy holder address of an existing person?

At this time we have to 'save' the record before it can be edited.

- When Adding New insurance policy, update the relationship if when it is not self. In our example, (01)- Spouse
- 2. In the last name field, lookup to choose an existing 'person'
- 3. Click the person ID
- The person address etc polulates and grays out
- 5. [SAVE]

1	Eligi <u>b</u> i	ility Payer ID (?	2)				Perso	n Records	
e ((Rela <u>t</u> io 01	ed Relationship onship (?) P SPOUS Holder					Filter (Last SMIT Searc		st
		2				\mathbf{P}	Person	Name	
	Suffix	SSN		DOB		Gend Seli	<u>11809</u>	SMITH, 3 N	835 D/ 4224
		PID 11809 Suffix	Last Nam SMITH	e	DOB 05/19/1963	3	First JOA Gended Male 1		
			4835 DAR	ROW	/ RD.	4		,	
	Save	[F2] 5						4	

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After saving > Click the Insurance hyperlink, to modify the Policy

Now you have access to the 'select' drop down > use Modify Policy Holder... > *TAB* and now update the person address etc. > [SAVE]

Default	Primary	
Policy	RE [MEDICARE] Add N	Add/Modify Patient Insurance Patient: 134348 Name
Profile Note Save	Click to edit Policy	Insurance/Policy
	Billing Address: MEDICARE OF GEORGIA	MEDICARE MEDICARE - Address ID (?) Expiration
ave [F2] Cancel	, Copay: 0.00	Policy Group Group Name
Add Self Pay Profile N	Policy: XX DDe Group: Modified: SUPPORT - 01/18/2	XX P Copay Product Assignment Insurance Type (?) 0.00 P
licies not part of an Insu	Note:	Insured Relationship
		Relationship 01 P SPOUSE Select Desired Function To Modify or Change Policy Holder Demographics Select Desired Function To Modify or Change Policy Holder Demographics
		Insured (Policy Holder) Modify Policy Holder Demographic Information
		110370 PAUL
		SSN DOB Gender
		Male 🔻

How do I indicate that Medicare is secondary?

Use the Medicare Secondary Reason dropdown to indicate why Medicare is secondary

le. Addition o	Insurance/Policy	MEDICARE - PC	BOX 20019	NASHVILLE T	Effe <u>c</u> t N 37202	ive (?)]
<u>1271</u> (800) 34 1332949 Gr	Address ID (?) Policy (?) XXXXXXXXX	Expiration (?)	<u>G</u> roup		Group Name		C <u>o</u> pay (?)
	Assignment Plan	n (?)		Product (?)		Medicare	Secondary Reason (?)
Billing Note	Yes 🔻 - S	BELECT -	۲	- SELECT -		 SELE 	CT - 🗸
13 - Medicare 14 - Medicare	Secondary Working Age Secondary End-Stage F Secondary, No-fault Insi Secondary Workers Cor	Renal Disease Ben urance including A	eficiary in the	12 month coord		with an emp	loyers group health pla
	Secondary Public Health		Other Feder	al Agency			
		()		5 -5			
	Secondary Black Lung						
41 - Medicare	Secondary Black Lung Secondary Veterans Ad	ministration					

How do I use Plan and Product

- **Plan** drop-down contains the ANSI Plans
 - If you are using our eligibility verification service, the eligibility results will auto-update the patient's Plan information if the data is included in the results.
- Product drop-down options: managed in the Insurance Library, or by clicking -Manage- in the drop-down (if

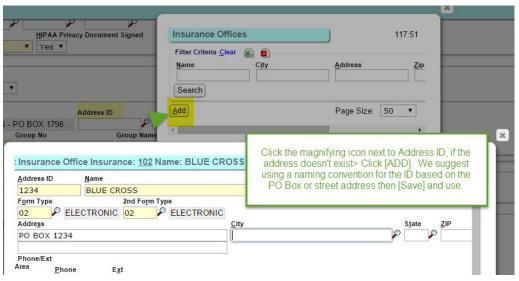
your permissions allow)	<u>€66884</u>
If you are using our eligibility	 € 66887 € Active Police
verification service, the	
eligibility results will	MEDICAL MU
auto-update the patient's	MEDICAID [108
Product information if the data	- ⊞ ⊠ <u>Notes</u> Ade Date
is included in the results.	07/31/2017

 <u>€ 66884</u> 1 66887 −∓ ⊠ Active P 		Add/Modify F	Patient Insurance Pa	atient: 20001 Name: MOUSE, M	IINNIE	
	nsurance	Insurance/Polic	y		Effective	
Contraction of the local distance of the loc		110	AETNA - PO BO	X 981106 EL PASO TX 79998-1106	6	
MEDICAL M		Address ID	Expiration]		
	Add	Policy 456	2	Group	G <u>r</u> oup Name	
Date		Assignment	Plan	Product	Medicare Secondary Reaso	n
07/31/2017	E	Yes	Disability [D]	PROD 1	- SELECT -	•

Insurance

How do I add a street address to an existing Insurance?

In the Address ID field use the lookup then click [Add]



How do I add a new Insurance to the system from Insurance Management

Add to the Insurance Libraries 'on the fly' while adding a patient's insurance: When adding a new profile > 'Add New' link > Click the Magnifier, [Add], key in new insurance and [SAVE] * this is permission based

Insurance Management		2.4.4.9	
Insurance Profiles	Add/Modify Patient In	Insurance Carrier R	Edit Insurance 119:44
	Insurance/Policy	Filter Criteria Clear	Insurance ID Type Active Abbreviation Insurance Insurance Company V
Add New From Existin	Insurance Effe	Insurance <u>N</u> ar	Payer ID ERA P2 ID Flinibility Payer ID Claim Statu: Use 'PRINT' if no payer
Profile Note Save as Billing I	Address ID Exp	Search	Claim Filing Indicator
	Policy	Add	CI COMMERCIAL INSURANCE CO. Primary Form Type Secondary Form Type
	Copay Product	Insurance Nar	- SELECT - T
Save [F2] Cancel	Insured Relationship	102 BLUE CROS SHIELD OF F	Billing Group Reporting Group ICD10 Active Date Print Address on HCFA
Add Self Pay Profile	Relationship	<u>103</u> AETNA	Address Info
Status Encounters	18 SELF	UHC & AARF	Street

Patient responsibility - Statement

How can I be sure that no statements are sent to patient for encounters on this profile?

In the Profile, use the 'Patient' drop-down to indicate 'Not responsible'

nsurance Profiles		Responsible: Send Statements for Encounters on this Profile Not Responsible: Hold Statements for Encounters on this Profile		
	RKERS CO [306] icy: XXX Group:	p here 🦻	Responsible	
101	icy. Not Group.		Responsible	
rofile Note 📃 Sa	ve as Billing Note		Not Responsible	
		\$		
		► 1	<i>,</i>	
Save [F2] Cancel)			

How do I make the Patient 'Not Responsible' for all profiles with this insurance?

'Not Responsible' means this patient will not receive any statement for encounters affiliated with this Profile.

Go to the Insurance	Edit Insuran	ice
Library > Edit > un-check 'Patient	Insurance ID 321	<u>Iype</u> Insurance Com
Responsible'	Payer ID (?)	E <u>R</u> A Payer ID
	Insurance Mai	nagement

Insurance ID	Туре	Active Abbreviation	Insurance Name		
321	Insurance	e Company ▼ 🗹 (?) Medicaid	MEDICAID		
Payer ID (?)	E <u>R</u> A P	ayer ID (?) Eligibility Payer ID	<u>Claim Status Payer ID</u>	ERA <u>Management</u> Profile	A <u>s</u> signment Patient Respons
mcdtx	₽		P P	MEDICAID 🔹	
Insurance Management Patient: 9131					IMAGINARY, MARY
Insurance Profile: <u>A</u> dd New Insurar					Active Pr
Status	Encounters	Primary	Secondary	Tertiary	Patient
× <u>Default</u>	<u>0</u>	<u>Medicaid [321]</u> Policy: xxxxxx Group:			Not Responsible

Insurance: 321

Name: MEDICAID

Now, all Insurance Profiles that are built after this change, with this insurance will save with the Patient portion being 'Not Responsible'