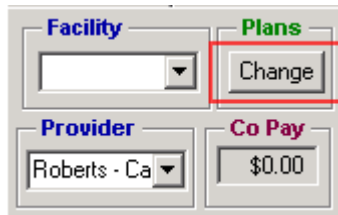


## Changing Insurance Plans on Posted Invoices


On occasion, you'll need to change the insurance plan on a posted invoice because you entered the transaction to the wrong insurance plan.

Instead of deleting the entire invoice, including charges and payments, you can change the insurance plan on all selected transactions using the Change button under the Plans area on the Charge/POS Payment Entry window.




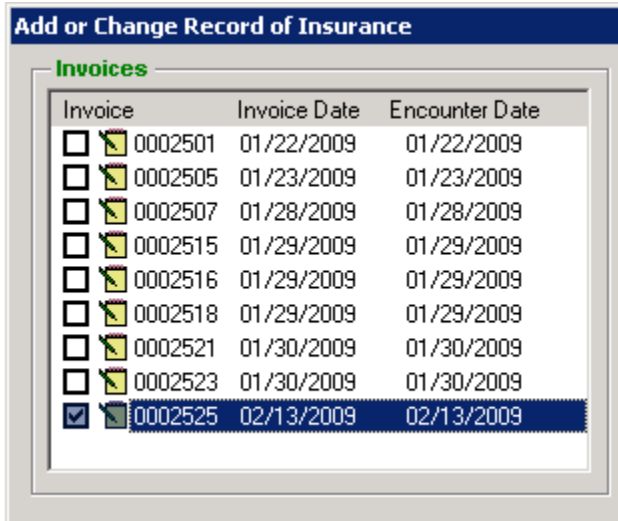
Before you can change the insurance plan on any posted invoice, make sure that the patient's new insurance plan is confirmed for the desired encounter date.

### Add New Insurance Plan Record

1. Browse  for and make patient active
2. Click the Edit button under the Primary Insurance section of the Patient Address View window
  - *The insurance windows can also be accessed by double clicking on the Primary Insurance folder under the patient record or clicking on the Primary Insurance task on the ActionManager for scheduled patients.*
3. On the Primary Insurance tab, Click the New button under the Record area to create a new insurance record for the Encounter Date
  - Note that clicking on the New button erases the current Record of Insurance
4. Enter Plan Name under the Insurance Information area
  - Click Yes when asked, "a Record of Insurance already confirmed for this date of record, Do you wish to continue?"
  - Do not enter any insurance plan information in the second field next to Plan Name
5. Enter address where claim is mailed / submitted to.
6. Enter Co-Pay (is applicable)
7. Enter Insurance Authorization number under Policy Number and enter Policy Number to ID field under the Insured's Information pane
8. Enter Group Number and VSP Plan Name
9. Check Effective Date (leave Termination date unchecked)
10. Verify Encounter date is today's date and is checked
11. Repeat the above procedures for Secondary and Other Insurance Plans, if necessary.

### Changing Insurance Plan on Posted Invoice

1. Browse  for the patient and make active
2. Open Patient Account
3. Select Posted Invoice you want to change insurance plans on.
4. Highlight transaction lines
  - o Remember to left mouse click, hold and drag to select multiple transaction lines
5. Click on Change button under the Plans section
6. Select invoice to change under the Invoices section



- o Remember to unchecked all invoices you don't want to change.
7. Select Record of Insurance under the Available Records of Insurance section that you want to change the selected transactions to.
  - o Remember to unchecked all Record of Insurances that you don't want to use.
8. Click Apply
  - o **Important:** The Record of Insurance, which you are changing to, should be listed
9. Click YES when asked: Do you wish to change the Invoice to use the new fee schedule if it is different for the selected plan?
10. Click OK to the message: "Successfully applied selections to Record of Insurance and Invoice."
11. Click OK
12. Verify that Insurance plan was changed and that the charges are entered in the correct column (e.g. Insurance or Patient)