



Entering Primary, Secondary and Other Insurance Plans

Patient is the Primary Policyholder

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 doubling 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, enter Plan Name under the Insurance Information area
 - Do not enter any insurance plan information in the second field next to Plan Name
4. Enter address where claim is mailed / submitted to.
5. Enter Co-Pay (if applicable)
6. Enter Insurance Authorization number in the Policy Number field and enter Policy Number in the ID field under the Insured's Information area *
7. Enter Group Number and VSP Plan Name (if applicable)
8. Check Effective Date (leave Termination date unchecked)
9. Verify that Encounter date is today's date and is checked
10. Repeat the above procedures for Secondary and Other Insurance Plans

Patient is not the Primary Policyholder

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 doubling 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, enter Plan Name under the Insurance Information area
 - Do not enter any insurance plan information in the second field next to Plan Name
4. Enter address where claim is mailed / submitted to.
5. Enter Co-Pay (if applicable)
6. Enter Insurance Authorization number in the Policy Number field
7. Enter Group Number and VSP Plan Name (if applicable)
8. Check Effective Date (leave Termination date unchecked)
9. Verify that Encounter date is today's date and is checked
10. Click the Clear Insured button (Insured's Information area), enter first few letters of

Insured's last name and click on Browse 

11. Select Insured and click the Insured/F11 button at the bottom right



12. Enter Policy Number in ID field under the Insured's Information area*
13. Change Relationship of patient to Insured (e.g. CH – Child, OT- Other, SP- Spouse)
14. Repeat the above procedures for Secondary and Other Insurance Plans

*Add Patient's Social Security Number in the ID field on the Patient Address View Window