

### Important Content Update Message

We are currently updating the OP Help Center content for the release of OP 20. OP 20 (official version 20.0.x) is the certified, 2015 Edition, version of the Office Practicum software. This is displayed in your software (**Help tab > About**) and in the Help Center tab labeled Version 20.0. We appreciate your patience as we continue to update all of our content.

# Copying Insurance Information From a Family Member

Last Modified on 12/31/2019 9:35 am EST

Version 14.19

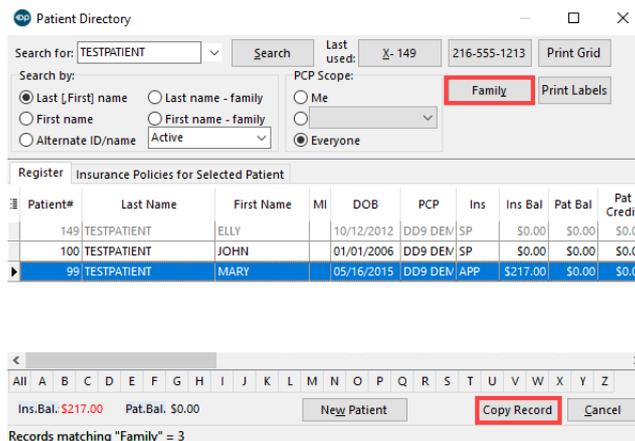
**Path: Patient Chart > Insurance**

## Overview

This page will instruct you on how to copy a sibling's insurance record.

## Copying Insurance Information

1. From the patient chart, click the **Insurance** tab.
2. Click the **Add** button.
3. Click the **Copy From** button.
4. Click on the **Family** button and select the sibling to copy from.
5. Click the **Copy Record** button.



Register Insurance Policies for Selected Patient

Patient#	Last Name	First Name	MI	DOB	PCP	Ins	Ins Bal	Pat Bal	Pat Credit
149	TESTPATIENT	ELLY		10/12/2012	DD9 DEM/ SP		\$0.00	\$0.00	\$0.00
100	TESTPATIENT	JOHN		01/01/2006	DD9 DEM/ SP		\$0.00	\$0.00	\$0.00
99	TESTPATIENT	MARY		05/16/2015	DD9 DEM/ APP		\$217.00	\$0.00	\$0.00

Records matching "Family" = 3

6. Select the policy to copy.
7. Click the **Copy Record** button.

Patient Directory

Search for: TESTPATIENT Search Last used: X-149 216-555-1213 Print Grid

Search by:
   
 Last [First] name
   
 Last name - family
   
 First name
   
 First name - family
   
 Alternate ID/name Active

PCP Scope:
   
 Me
   
 Family
   
 Everyone

Register Insurance Policies for Selected Patient

Patient#	Last Name	First Name	MI	DOB	PCP	Ins	Ins Bal	Pat Bal	Pat Credit
149	TESTPATIENT	ELLY		10/12/2012	DD9 DEN	SP	\$0.00	\$0.00	\$0.00
100	TESTPATIENT	JOHN		01/01/2006	DD9 DEN	SP	\$0.00	\$0.00	\$0.00
99	TESTPATIENT	MARY		05/16/2015	DD9 DEN	APP	\$217.00	\$0.00	\$0.00

Records matching "Family" = 3

**Note:** When you use the Copy From function, check the patient insurance ID numbers. Some insurance companies issue the same ID number for all family members, while other insurance companies issue separate ID numbers for each family member.

8. Populate the Subscriber-Last Name field, Sex/birth date, and Patient Relationship to Subscriber fields.
9. Populate the Patient Responsibility Guarantor and Statement Method fields.
10. Click the **Ranking** column, and select one of the following ranking options listed below. Upon doing so, the Insurance Record will be saved.

- **P = Primary**
- **S = Secondary**
- **T = Tertiary**
- **C = Clear**

**Insurance**

Primary Ins: SP Secondary Ins:

Patient Responsibility Guarantor			Statement Method			
Status	Ranking	Code	Ins Carrier Name	Insured ID	Group Number	Validated
ACTIVE		SP	SELF-PAY			

Adding New Insurance Record Address/Employer Medical Benefits Pharmacy Benefits

Policy status:

Status: ACTIVE Validated: Terminated: Last updated by:

First name: Sex/birth date: Patient rel to subscriber: Insurance carrier: SP SELF-PAY Subscriber ID: Group number: Group name: VFC eligibility: 5 Patient signature on file  Provider accepts assignment  Deductible satisfied

Patient responsibility: Type: Waived for preventive care  PCP visit copay: Well visit copay: After hrs copay: Specialist copay: Lab copay: Coinsurance %:

Version 14.10

Path: Smart Toolbar > Insurance Button

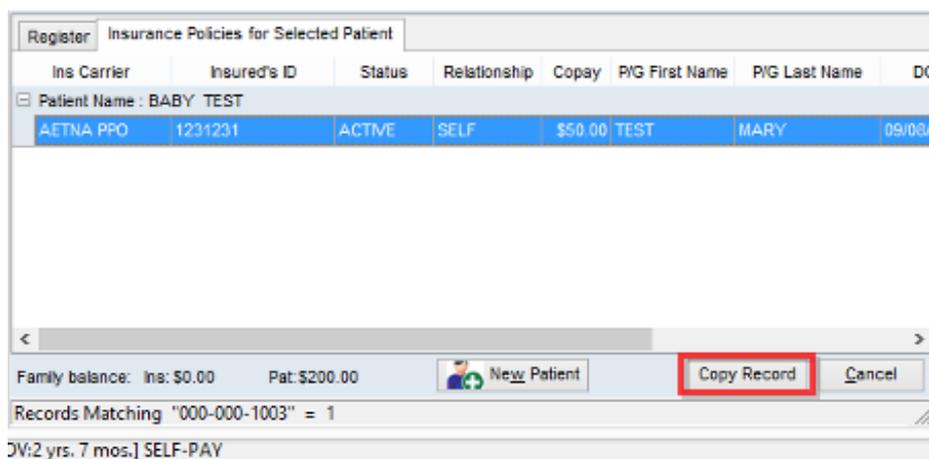
Path: Smart Toolbar > Register Button > Insurance tab

## Overview

This page will instruct you on how to copy a sibling's insurance record.

## Copying Insurance Information

1. Click the **Insurance** tab  .
2. Click the **Insert Record** button  .
3. Click the **Copy** button  .
4. Click on the **Family** button  and select the sibling to copy from.
5. Click the **Copy Record** button  .
6. Select the policy to copy.
7. Click the **Copy Record** button  .



### Copying an Insurance Record: Copy Policy

When you use the **Copy From** function, remember to check the patient insurance ID numbers.

- Some insurance companies issue the same ID number for all family members, while other insurance companies issue separate ID numbers for each family member.

8. Click into the **Ranking** column, choose one of the following ranking options.

- **P = Primary**
- **S = Secondary**
- **T = Tertiary**
- **C = Clear**



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## Copying an Insurance Record: Ranking

