

Change Insurance on Individual Transactions

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Version 14.19

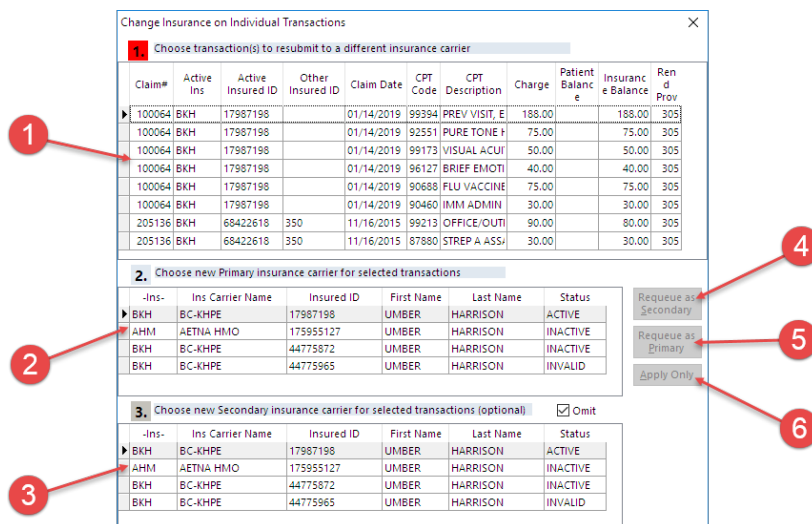


This window map article points out some of the important aspects of the window you're working with in OP but is not intended to be instructional. To learn about topics related to using this window, see the **Related Articles** section at the bottom of this page.

About Change Insurance on Individual Transactions

Path: Clinical, Practice Management or Billing tab > Patient Chart button > Claims > Change Payer button

At times, there will be instances when a claim is sent to the wrong insurance and needs to represent the most accurate and up-to-date insurance for a patient. The Change Insurance on Individual Transactions window changes the primary (and optional secondary) insurance for selected transactions.



The screenshot shows the 'Change Insurance on Individual Transactions' window. It contains three main sections:

- 1. Choose transaction(s) to resubmit to a different insurance carrier:** A table listing claims with columns for Claim#, Active Ins, Active Insured ID, Other Insured ID, Claim Date, CPT Code, CPT Description, Charge, Patient Balance, Insurance Balance, and Rend Prov.
- 2. Choose new Primary insurance carrier for selected transactions:** A table listing insurance carriers with columns for Ins Carrier Name, Insured ID, First Name, Last Name, and Status. Buttons for 'Requeue as Secondary', 'Requeue as Primary', and 'Apply Only' are visible.
- 3. Choose new Secondary insurance carrier for selected transactions (optional):** A table similar to section 2, with an 'Omit' checkbox.

Change Insurance on Individual Transactions Map

Number	Section	Description
1	Transactions	The list of claims with an Insurance balance that can be sent to a different payer. Claim(s) must be selected here before proceeding to #2 where the Primary Insurance is selected.
2	Active Primary Insurance Carrier	The patient's insurance list where the Active Primary insurance carrier for the selected transactions is selected.
3	Secondary Insurance Carrier	The patient's insurance list where the Active Secondary insurance carrier for the selected transactions is selected. This field is only used if applicable. If no other insurance is required, the Omit checkbox should be selected.
4	Requeue as Secondary button	Clicking the Requeue as Secondary button will apply highlighted insurance information and electronically resubmit as the secondary insurer.
5	Requeue as Primary	Clicking the Requeue as Primary button will apply highlighted insurance information

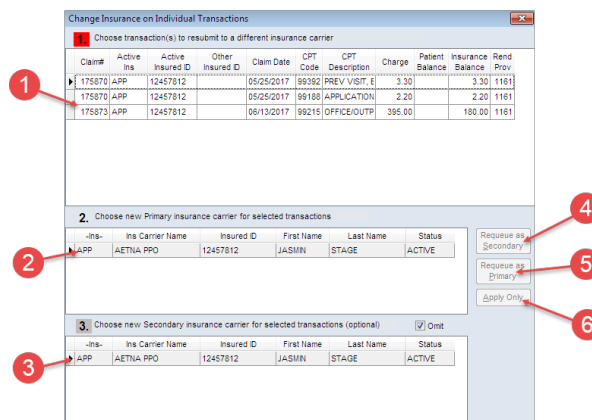
	button	and electronically resubmit as the primary insurer.
6	Apply Only button	Clicking the Apply Only button will not submit the highlighted transactions electronically. It will, however, apply the highlighted insurance information to the claim.

Version 14.10

About Change Insurance on Individual Transactions

Path: Smart Toolbar > Account button > Claims tab > Change Payer button

At times, there will be instances when a claim is sent to the wrong insurance and needs to represent the most accurate and up-to-date insurance for a patient. The Change Insurance on Individual Transactions window changes the primary (and optional secondary) insurance for selected transactions.



Change Insurance on Individual Transactions Map

Number	Section	Description
1	Transactions	Choose transaction(s) to resubmit to a different insurance carrier by holding down the CTRL button on the keyboard and selecting the transactions.
2	Active Insurance Carrier	Choose the Active insurance carrier for the selected transactions.
3	Other Insurance Carrier	Choose the new Other Insurance (Secondary insurance) carrier for selected transactions. This field is optional. If no other insurance is required, select the Omit checkbox.
4	Requeue as Secondary button	Clicking the Requeue as Secondary button will apply highlighted insurance information and electronically resubmit as the secondary insurer.
5	Requeue as Primary button	Clicking the Requeue as Primary button will apply highlighted insurance information and electronically resubmit as the primary insurer.
6	Apply Only button	Clicking the Apply Only button will not submit the highlighted transactions electronically. It will apply the highlighted insurance information and drop the transactions onto the CMS-1500 form.