

# Create a New Insurance Record

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Version 20.13

**Path: Clinical, Practice Management, or Billing tab > Patient Chart button**

## About

A patient's insurance details are entered into the Insurance section of the Patient Chart. Below, are instructions for adding a new insurance record for a patient.

## Add an Insurance Record

1. Within the Patient Chart, navigate to **Insurance**.
2. Click the **Add** button  to start a new record.
3. In the **Adding New Insurance Record** tab, enter the following information. The fields highlighted in red are required to save the insurance record.
  - **Insurance Policy Holder:** Use the drop-down (field highlighted in red) to select the policyholder. If the policyholder is not the patient (self), the person must first be entered as a Family Contact to appear as an option in the drop-down.
  - **Sex/birth date:** Select the radio button to select the sex of the policyholder. The date of birth automatically populates based on the contact record created in OP.
  - **Patient Rel to subscriber:** Use the drop-down to select the relationship of the patient to the policyholder (e.g., child, self, mother, father, spouse, etc.).
  - **Insurance Carrier:** Click the **Ellipsis** button to select the insurance from the **Insurance Carrier Lookup** window.
  - **Subscriber ID:** Enter the Subscriber ID number obtained from the patient's insurance card or another source
4. If you have an integrated clearinghouse, click the **Validate** button at the top of the window to validate the insurance.



**Note:** Insurance validation only functions if you have contracted for Real-Time Eligibility with your clearinghouse.

5. The fields below may populate from validation. If they do not populate or you are not using an integrated clearinghouse, manually enter the information:
  - **Plan Name:** If the insurance payer provides this information via the clearinghouse, this field will populate when validating insurance. This is not a free text field and cannot be modified by users.
  - **Group number:** Confirm or enter the group number.
  - **Group name:** Confirm or enter the group name.
  - **VFC Eligibility:** Confirm or select VFC eligibility.
  - **Patient responsibility Type:** Confirm or select the patient responsibility for the policy.



**Note:** An option other than Copayments only could result in balances being dropped to the patient prior to the claim being adjudicated by the insurance.

- **Copays:** Confirm or enter copay obligations in the appropriate copay fields.
- **Policy Status:**

Adding New Insurance Record		Address/Employer	Medical Benefits	Pharmacy Benefits
Policy status:				
Status:	ACTIVE	Validated:		
Effective:		Terminated:		Last updated by:

- **Status:** Default is set to Active. Options include: Active, Inactive, Invalid or Pending.
- **Validated:** Date the insurance was validated.
- **Effective:** Date the insurance coverage is active for the patient.
- **Terminated:** Date the insurance policy ends. Not applicable when initially entering a new record.

6. Select the **Patient Responsibility Guarantor** and the **Statement Method** located at the top of the window using the drop-down fields. The Guarantor links patients to a financial family. See [Linking Families in OP](#).

Patient Responsibility Guarantor	Statement Method
DONALD TEST	Mail

7. Located below the Patient Responsibility Guarantor and Statement, click in the **Ranking** field and select from the following ranking options to save the new insurance record:

Patient Responsibility Guarantor		Statement Method				
DONALD TEST		Mail				
Status	Ranking	Code	Ins Carrier Name	Insured ID	Group Number	Validated
ACTIVE	P S T C	BKH	BC-KHPE	IDNUMBERHERE	GROUPHERE	

- **P:** Primary
- **S:** Secondary
- **T:** Tertiary

**Note:** If the wrong ranking was selected, click **C** to clear the ranking. If insurance is entered and is the only insurance with an Active status, OP automatically ranks the insurance as the primary insurance when saving the record.


Version 20.12

**Path: Clinical, Billing, or Practice Management tab > Patient Chart button**

## Overview

In this section you will find instructions on adding an insurance to the patient record.

### Add an Insurance Record

1. Access the Patient Chart using the path above.
2. Search for and select the patient.
3. Click **Insurance**.
4. Click the **Add** button  to start a new record.
5. In the **Adding Insurance Record** tab, enter the following information: (the fields highlighted in red are required to save the insurance record)

<b>Adding New Insurance Record</b>		Address/Employer	Medical Benefits	Pharmacy Benefits
Policy status:				
Status:	ACTIVE	Validated:		
Effective:		Terminated:		
Last updated by:				
First name:		Patient responsibility:		
Sex/birth date:	<input type="radio"/> Male <input type="radio"/> Female	Type:		
Patient rel to subscriber:		<input checked="" type="checkbox"/> Waived for preventive care		
Insurance carrier:		PCP visit copay:		
Subscriber ID:		Well visit copay:		
Group number:		After hrs copay:		
Group name:		Specialist copay:		
VFC eligibility:	5	Lab copay:		
Patient signature on file <input checked="" type="checkbox"/>		Provider accepts assignment <input checked="" type="checkbox"/>	Deductible satisfied <input type="checkbox"/>	

- **Insurance Policy Holder:** Use the drop-down in the first blank red field to select the policy holder. The policy holder must be listed as a contact in the patient's chart in order to see him/her listed in this drop-down.
- **Sex/birth date:** Select the radio button to select the gender of the policy holder, and enter the policy holder's date of birth. Depending on who the policy holder is, this could be that of the parent or the patient in some specific insurance cases.
- **Patient Rel to guarantor:** Use the drop-down to select the relationship of the patient to the policy holder (e.g., child, self, mother, father, spouse, etc.).
- **Insurance Carrier:** Click the **ellipsis** button to select the insurance from the **Insurance Carrier Lookup** window.
- **Subscriber ID:** Enter the Subscriber ID number obtained from the patient's insurance card or other source
- **Group number** and **Group name** (if applicable).
- **Patient responsibility** (if applicable) and **Copays** (if applicable).
- Enter any applicable policy information in the **Policy Status** section of the window, as follows:

Adding New Insurance Record		Address/Employer	Medical Benefits	Pharmacy Benefits
Policy status:				
Status:	ACTIVE	Validated:		
Effective:		Terminated:		Last updated by:

- **Status** (Default is set to Active).
- **Validated**
- **Effective**
- **Terminated** (not applicable when initially entering a new record).

6. Select the **Patient Responsibility Guarantor** and the **Statement Method** located at the top of the window using the drop-down fields.

Patient Responsibility Guarantor	Statement Method
DONALD TEST	Mail

7. Located below the Patient Responsibility Guarantor and Statement, click in the **Ranking** field next to the newly entered insurance and select from the following ranking options:

Patient Responsibility Guarantor		Statement Method				
DONALD TEST		Mail				
Status	Ranking	Code	Ins Carrier Name	Insured ID	Group Number	Validated
ACTIVE	P S T C	BKH	BC-KHPE	IDNUMBERHERE	GROUPHERE	

- **P:** Primary
- **S:** Secondary
- **T:** Tertiary
- **C:** clear the ranking

**Note:** If the wrong ranking was selected, click **C** to clear the ranking. If insurance is entered and is the only insurance with an Active status, OP automatically ranks the insurance as the primary insurance when saving the record.