

Making an Insurance Record Inactive

Last Modified on 07/26/2023 1:54 pm EDT

Version 21.1

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

About

To maintain the accuracy of a patient's Insurance record as well as a historical list of previous coverage, it is Best Practice to inactivate insurances as they expire so that a record of previous coverage is available. When an insurance record is inactivated, by default it will be hidden in the patient's insurance records, however the window offers the option to view or hide inactive Insurance records.

Inactivate an Insurance Record

1. Navigate to the patient's Insurance record by following the path above.
2. Select the Insurance plan that needs to be inactivated, and click the **Edit** button.
3. Click the **Status** drop-down and select **Inactive** from the list.
4. *(Optional)* In the Terminated field, enter the date when the Insurance became inactive.
5. Click the **Save** button.

Note: The date the insurance record was updated and by which user ID is displayed in the Policy status section. This includes when an insurance record is set to inactive.



Policy status:	
Status: INACTIVE	Validated: 06/16/2022
Effective: 3/7/2022	Terminated: 6/16/2022
Last update: 06/16/2022 02:10 PM by: 107	

6. *(Optional)* If the patient is Self-Pay, click the **Self-Pay** button. A confirmation window displays to set the patient's insurance as Self-Pay, click the **Yes** button.
7. *(Optional)* Proceed by adding the patient's new insurance. See [Create a New Insurance Record](#).

View or Hide Inactive Insurance Records

When an Insurance Record is made inactive, it will be automatically hidden to declutter the Insurance window. To view or hide inactive Insurance Records:

1. Navigate to the patient's Insurance record by following the path above.
2. View Insurance Records with a Status of **Active/Invalid/Pending**:
 - o The **Hide Inactive** checkbox at the top of the window is checked by default. Check this box if it is not selected.
 - o Only the patient's Insurance records without a Status of Inactive will be visible:

Insurance

Hide Inactive

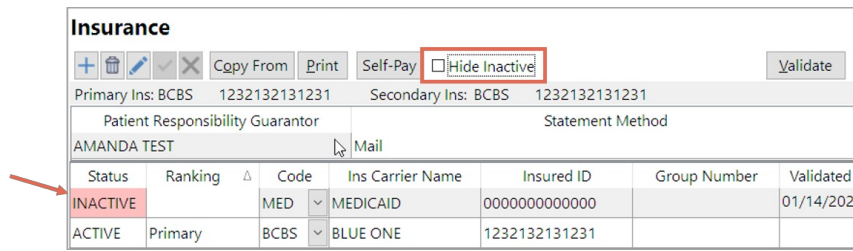
Primary Ins: BCBS 1232132131231 Secondary Ins: BCBS 1232132131231

Patient Responsibility Guarantor: AMANDA TEST Statement Method: Mail

Status	Ranking	Code	Ins Carrier Name	Insured ID	Group Number	Validated
ACTIVE	Primary	BCBS	BLUE ONE	1232132131231		

3. View Insurance Records with all Statuses (including **Inactive**):

- Uncheck the **Hide Inactive** checkbox. All of the patient's Insurance records will show:



Insurance

Hide Inactive

Primary Ins: BCBS 1232132131231 Secondary Ins: BCBS 1232132131231

Patient Responsibility Guarantor: AMANDA TEST Statement Method: Mail

Status	Ranking	Code	Ins Carrier Name	Insured ID	Group Number	Validated
INACTIVE		MED	MEDICAID	000000000000		01/14/202
ACTIVE	Primary	BCBS	BLUE ONE	1232132131231		

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