Modifying a Patient Insurance Record

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Version 20.17

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

About

In this article, you will learn how to edit a patient's insurance record.Once an insurance policy has been attached to a claim it cannot be modified. Instead, a new policy should be created, see **Creating a New Insurance Record**, and the old policy needs to be changed to inactive, see **Making an Insurance Record Inactive**.

Modify an Insurance Record

1. Navigate to the patient's insurance record by following the path above.
2. Click to select the insurance record that needs to be modified.
3. Click the **Edit** button and modify any of the below fields.

   - **Subscriber-Last Name** and **First Name**: Name of the person who is the policyholder.
   - **Sex/birth date:** The sex and date of birth of the policyholder.
   - **Relationship of the patient to the insured** Click the **Patient rel to subscriber** drop-down and select from the list.
   - **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
   - **Group number** and **Group name**: Enter the Group number and/or Group name.
   - **Co-Pay Obligation(s)**: Enter copay obligations in the appropriate copay fields.
   - **Effective Date:** Enter the date the insurance coverage is active for the patient
   - **Terminated Date**: Enter the date the insurance coverage was terminated.
   - **Status**: Click the **Status** drop-down and select a Status from the list.
   - **VFC Eligibility:** Click the VFC eligibility drop-down and select a VFC Eligibility from the list.

> **Note**: The date the insurance record was updated and by which user ID will display in the Policy status field. The information in these fields will update each time the insurance record is modified.
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About

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> **Note**: Once an insurance policy has been attached to a claim it cannot be modified. Instead, a new policy should be created, see **Creating a New Insurance Record**, and the old policy needs to be changed to inactive, see**Making an Insurance Record Inactive**.

Modify an Insurance Record

1. Navigate to the patient's insurance record by following the path above.
2. Click the **Edit** button .
3. Edit the following fields, as necessary:

   - **Name** of the insured
   - **Sex** of the insured
   - **DOB** (Date of Birth) of the insured
   - **Relationship of the patient to the insured**(i.e., child, mother, father, spouse, self)
   - **Insurance Carrier**
   - **Subscriber ID**
   - **Group number**
   - **Group name**
   - **Co-Pay Obligation(s)**
   - **Effective Date**
   - **Terminated Date**
   - **Status**
   - **VFC Eligibility**