

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.

Change Insurance on Individual Transactions (Daysheeted Claims)

Last Modified on 11/07/2019 10:56 am EST

Version 14.19

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

Overview

If a daysheeted claim was sent to an incorrect payer, the insurance on the claim can easily be changed for submission to the correct payer.

Changing Insurance (Daysheeted Claims)

1. From the **Clinical, Billing or Practice Management** tab, click the **Patient Chart** button
2. Click **Insurance** and inactivate any invalid insurance
3. Enter a new **Insurance Record**, if necessary
4. In the **Window Navigation Panel**, click **Claims**
5. Select the **Claim** whose payer needs to be changed.
6. Click the **Change Payer** button
7. The **Change Insurance on Individual Transactions** window is displayed
8. In the **Change Transactions on Individual Transactions** window, complete steps 1-3

Change Insurance on Individual Transactions

1. Choose transaction(s) to resubmit to a different insurance carrier

Claim#	Active Ins	Active Insured ID	Other Insured ID	Claim Date	CPT Code	CPT Description	Charge	Patient Balance	Insurance Balance	Revol Prov
100011	BCO	69386359		12/17/2018	99393	PREV VISIT, E	172.00		172.00	305
100011	BCO	69386359		12/17/2018	92551	PURE TONE H	75.00		75.00	305
100011	BCO	69386359		12/17/2018	99173	VISUAL ACUIT	50.00		50.00	305
100011	BCO	69386359		12/17/2018	99000	SPECIMEN H&	20.00		20.00	305
100011	BCO	69386359		12/17/2018	36415	ROUTINE VEN	15.00		15.00	305
100011	BCO	69386359		12/17/2018	90688	FLU VACCINE	75.00		75.00	305
100011	BCO	69386359		12/17/2018	90460	IMM ADMIN	30.00		30.00	305

2. Choose new Primary insurance carrier for selected transactions

-Ins-	Ins Carrier Name	Insured ID	First Name	Last Name	Status	Requeue as Secondary
BCO	BC-OTHER	69386359	KAI	ENGLISH	ACTIVE	
CPP	CIGNA PPO	CIG012345678	FREDDIE	ENGLISH	ACTIVE	Requeue as Primary
BCO	BC-OTHER	69386359	KAI	ENGLISH	INACTIVE	
BCO	BC-OTHER	42738588	KAI	ENGLISH	INACTIVE	Apply Only

3. Choose new Secondary insurance carrier for selected transactions (optional) ☒ Omit

-Ins-	Ins Carrier Name	Insured ID	First Name	Last Name	Status
BCO	BC-OTHER	69386359	KAI	ENGLISH	ACTIVE
CPP	CIGNA PPO	CIG012345678	FREDDIE	ENGLISH	ACTIVE
BCO	BC-OTHER	69386359	KAI	ENGLISH	INACTIVE
BCO	BC-OTHER	42738588	KAI	ENGLISH	INACTIVE

- Choose **Transaction(s)** to resubmit to a different insurance carrier. If a claim has multiple claim lines, hold down the **CTRL** key on your keyboard and select all **Transactions** for the claim.
 - Click to select the new **Primary Insurance** carrier for the selected **Transactions**
 - Click to select the new **Secondary Insurance** carrier for selected **Transactions** (if applicable). If there is no secondary, select the **Omit** checkbox.
- Click the **Requeue as Primary** button or the **Requeue as Secondary** button, depending on where the claim needs to be transmitted. If the claim is not to be sent to the Transmit Queue, click **Apply Only**.
 - Close the **Change Insurance on Individual Transactions** window.

Version 14.10

Path: Smart Toolbar > Account

Overview

At times, there are instances when a claim goes to the wrong insurance, and needs to be resent to the most accurate and up to date insurance for a patient. Please follow the following steps to change insurance on a claim that has been daysheeted.

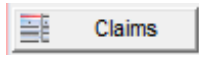
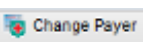
Changing Insurance (Daysheeted Claims)

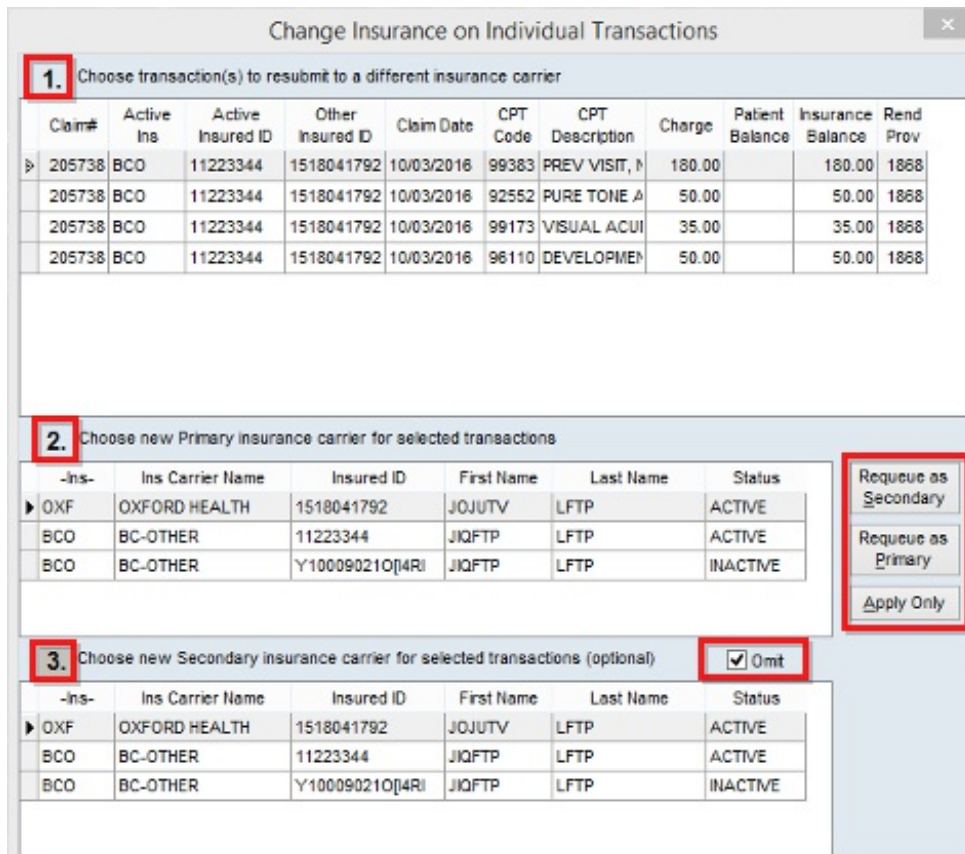
- On the **Smart Toolbar**, open the **Patient Account**



- Click on the **Insurance** tab 
- Inactivate** any invalid insurance and **Insert a New Insurance Record** for the most up to date

insurance for a patient

4. Once you update to the newest insurance, click the **Claims** tab 
5. Select the **Change Payer** button 
6. The **Change Insurance on Individual Transactions** window is displayed
Follow the Steps #a-#c.
 - a. Select **Transaction(s)** to resubmit to a different insurance carrier by holding down your **CTRL** key on your keyboard and selecting **Transactions**
 - b. Select a new **Primary Insurance** carrier for selected **Transactions**.
 - c. Select a new **Secondary Insurance** carrier for selected **Transactions** (optional), if there is no other insurance, select the checkbox for **Omit**.
7. Click the **Requeue to Primary** button if you are sending it back out electronically, if **Dropping to CMS-1500 form**, click **Apply Only**.
8. Click the **Red X** to close the window.



1. Choose transaction(s) to resubmit to a different insurance carrier

Claim#	Active Ins	Active Insured ID	Other Insured ID	Claim Date	CPT Code	CPT Description	Charge	Patient Balance	Insurance Balance	Rend Prov
205738	BCO	11223344	1518041792	10/03/2016	99383	PREV VISIT, 1	180.00		180.00	1868
205738	BCO	11223344	1518041792	10/03/2016	92552	PURE TONE A	50.00		50.00	1868
205738	BCO	11223344	1518041792	10/03/2016	99173	VISUAL ACUI	35.00		35.00	1868
205738	BCO	11223344	1518041792	10/03/2016	96110	DEVELOPME	50.00		50.00	1868

2. Choose new Primary insurance carrier for selected transactions

-Ins-	Ins Carrier Name	Insured ID	First Name	Last Name	Status
OXF	OXFORD HEALTH	1518041792	JOJUTV	LFTP	ACTIVE
BCO	BC-OTHER	11223344	JIQFTP	LFTP	ACTIVE
BCO	BC-OTHER	Y100090210J4RI	JIQFTP	LFTP	INACTIVE

Requeue as Secondary
Requeue as Primary
Apply Only

3. Choose new Secondary insurance carrier for selected transactions (optional) ☒ Omit

-Ins-	Ins Carrier Name	Insured ID	First Name	Last Name	Status
OXF	OXFORD HEALTH	1518041792	JOJUTV	LFTP	ACTIVE
BCO	BC-OTHER	11223344	JIQFTP	LFTP	ACTIVE
BCO	BC-OTHER	Y100090210J4RI	JIQFTP	LFTP	INACTIVE

Click for the next section: [Processing an Insurance Retraction or TakeBack or Recoupment](#)