

# Change Insurance Payer on Individual Transactions (Daysheeted Claims)

Last Modified on 05/15/2024 2:40 pm EDT

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	Revd 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 HA	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	Request as
BCO	BC-OTHER	69386359	KAI	ENGLISH	ACTIVE	Secondary
CPP	CIGNA PPO	CIG012345678	FREDDIE	ENGLISH	ACTIVE	Primary
BCO	BC-OTHER	69386359	KAI	ENGLISH	INACTIVE	
BCO	BC-OTHER	42738588	KAI	ENGLISH	INACTIVE	

**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

- a. 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.
  - b. Click to select the new **Primary Insurance** carrier for the selected **Transactions**
  - c. Click to select the new **Secondary Insurance** carrier for selected **Transactions** (if applicable). If there is no secondary, select the **Omit** checkbox.
9. 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**.
  10. Close the **Change Insurance on Individual Transactions** window.

Version 14.10

**Path: Smart Toolbar > Account**

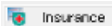
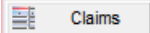
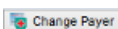
## Overview

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)

1. On the **Smart Toolbar**, open the **Patient Account**



2. Click on the **Insurance** tab 
3. **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, **iDropping to CMS-1500 form**, click **Apply Only**.
8. Click the **Red X** to close the window.

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	Revd Prov
▶ 205738	BCO	11223344	1518041792	10/03/2016	99383	PREV VISIT, N	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	DEVELOPMEN	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	Y100090210[4R]	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	Y100090210[4R]	JIQFTP	LFTP	INACTIVE

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