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

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
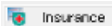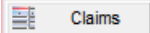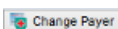
| **Path: Smart Toolbar > Account**

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 ![Insurance]
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 ![Claims]
5. Select the **Change Payer** button ![Change Payer]
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.

Click for the next section: **Processing an Insurance Retraction or TakeBack or Recoupment**