

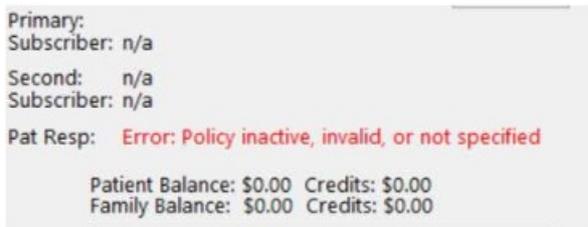
# How to Validate Insurances for the First Time

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## Validate Insurances for the First Time

Follow these steps to validate the insurances for the first time after being added:

1. Go to **Schedule**.
2. Enable **Tracking View**.
3. If you do not see the insurance, click **Update Ins**. Invalid insurances are marked with **Error: Policy inactive, invalid, or not specified**. In this case, you need to correct the insurance.



Primary:  
Subscriber: n/a

Second: n/a  
Subscriber: n/a

Pat Resp: **Error: Policy inactive, invalid, or not specified**

Patient Balance: \$0.00 Credits: \$0.00  
Family Balance: \$0.00 Credits: \$0.00

## Insurance Validation Troubleshooting

Follow these steps to correct the insurance:

1. If the insurance is empty and does not appear, uncheck the **Hide Inactive** flag.



**Insurance**

+ [trash] [edit] [check] [X] Copy From Print Self-Pay  Hide Inactive

2. If the Insurance carrier is unknown (**UNK**), enter the right abbreviation for the payer.



Insurance carrier: ANTHEM ANTHEM BCBS

3. Click the **Validate** button at the top.
4. Review the changes when prompted. These can include:
  - o Name
  - o DOB
  - o Co payment amount
5. Verify that the following conditions are met:
  - o Make sure the status is **active**.
  - o Enter the Ranking:
    - **P** : Primary
    - **S** : Secondary
    - **T** : Tertiary

Status	Ranking
ACTIVE	

6. Accept **VFC Eligibility** prompt.
7. Make sure to set the **Guarantor/Statement Method**.
8. Update the family contacts if empty, and then you can select the guarantor.

