dd Insured or Payer Policy

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he Insurance Info tab is used to manage your patient's insurance policy information. It is used to add and dit insurance payers and insured party information while creating a new patient or after the patient has een saved.

1. Select **Patient** > **Patient**.
2. Use the **Search** field to search through your patients.

   > Place a check in the ***"Include inactive patients"*** box to include inactive patients in your search results.

3. Select the **Patient**.
4. Click the **Insurance Info** tab.
5. Click the **Add New** button or click on the arrow and select which type of payer to add. (e.g., Primary, Secondary or Tertiary).
6. Add the **Insured Party** by either selecting the **Existing Insured (for existing patients) or Creating A New Insured**.
   1. **Creating a New Insured party?**
      1. Check whether the patient is the insured or not.
      2. Use the **Patient Relation to Insured** drop-down menu to specify the patient's relationship t the insured.
      3. Enter the **Contact Info**.
      4. **Expand the Employer Information** and begin adding any applicable information.
7. Select the **Payer Info** tab near the top of the window.
8. Set the **Priority** for this payer using the **Priority** drop-down.
9. Use the **Policy Type** drop-down menu to specify the policy type for this payer.
10. Use the icon to locate the Payer.

    > If the primary clearinghouse connection does not support eligibility, you can use our *'Check eligibility using a different payer ID*" option. This is particularly useful for scenarios such as

Independent Physician Associations (IPAs) in California that utilize distinct payer IDs for claims processing and eligibility verification.

11. **Optional**: Select the "***Check eligibility using a different payer ID***" checkbox and use the 🔍 icon to locate your Eligibility Payer.

12. Enter the **Member** & **Group ID**.

13. Enter the **Copay, Co-insurance**, **Deductible, & Out of Pocket Max**.

14. Enter the **Effective Date** & the **Termination Date**.

15. Click **Add**.

16. Want to check **Eligibility** for the payer?

    1. Click the **Eligibility** link.

    2. A **Check Eligibility** window will open.

    3. Use the **Insurance Policy** drop-down menu to select which payer to check eligibility for.

    4. Use the **Service Type** drop-down menu to select the eligibility type.

    5. Enter the **Service Date Range**.

    6. Click **Check Eligibility**.

    7. ***Optional***: Print a copy of the eligibility report by clicking the Print button.

    8. Click **Close** once finished viewing the report.

    Any errors or warnings related to the last eligibility check performed will display a icon next to the payer. You can review the error message and recommend steps to correct the issue.

17. Click **Save.**