

Add Insurance Details

1. From the Patient Account, click Insurance Details
2. Mark patients with no insurance as 'Self Pay' and use "Patient relationship to insured" to indicate the responsible party for bills, then Save

The screenshot shows the 'Insurance Details' form for a patient named Shirley Spaghetti, born 01/01/2003. The form is part of the PAYDC (Robbels Allion) system. The left sidebar contains navigation links: Add Patient, Dashboard, Patients, Billing, Reports, KPI, and Forms. The top navigation bar shows the user is Dave Klein, a PAYDC DBA Spinal Hea... The form tabs include Patient Dashboard, Insurance Details (selected), File Cabinet, Payment Details, Health History Questionnaire, and Pre-Filled Forms. The 'Payment Method' section has two radio buttons: 'Self Pay' (selected) and 'Insurance'. Below this, the 'Self Pay' section is active, showing 'ChirohealthUSA Patient' as a toggle switch and 'Patient relationship to the insured' with radio buttons for 'Primary Member', 'Secondary Member', 'Unspecified' (selected), 'Self' (selected), 'Spouse', 'Child', and 'Other'. The form fields include First Name (Shirley), Middle Name, Last Name (Spaghetti), Date of Birth (01/01/2003), Sex (Female), Payer Address (123 street road), City (philadelphia), Payer Telephone, State (PA), and Postal Code (19111-). At the bottom right are 'Cancel' and 'Save' buttons. Red arrows point to the 'Self Pay' radio button and the 'Self' radio button under 'Patient relationship to the insured'.

3. For insured patients, select "Insurance" and then "Add Carrier" to select the patient's insurance carrier.

The screenshot shows the 'Insurance Details' form for a patient named Avery Darling, born 05/05/1995. The form is part of the PAYDC (Robbels Allion) system. The left sidebar contains navigation links: Add Patient, Dashboard, Patients, Billing, Reports, KPI, and Forms. The top navigation bar shows the user is Dave Klein, a PAYDC DBA Spinal Hea... The form tabs include Patient Dashboard, Insurance Details (selected), File Cabinet, Payment Details, Health History Questionnaire, and Pre-Filled Forms. The 'Payment Method' section has two radio buttons: 'Self Pay' and 'Insurance' (selected). Below this, the 'Insurance' section is active, showing 'Carriers' and an 'Add Carrier' button. At the bottom right are 'Cancel' and 'Save' buttons. Red arrows point to the 'Insurance' radio button and the 'Add Carrier' button.

4. Choose the patient's Insurance Carrier from the drop-down menu, then select the patient's relationship to the policy holder and enter Insured ID Number and Group Number, and click Save.

The screenshot shows the 'Edit Insurance Details' form for a patient named Gregory, Garlic. The form is divided into several sections. The 'Carriers' section lists 'Blue Cross Blue Shield (Payer ID: 00403)' with a table of member information. The 'Insurance Details' section includes fields for 'Carrier Name' (set to Blue Cross Blue Shield), 'Participate With Carrier' (Yes), 'Patient Relationship to the Payer' (Self), 'Release Information To Provider' (checked), 'Insured ID Number' (12345), and 'Group Number'. The 'Insured Details' section includes fields for 'First Name' (Gregory), 'Middle Name', 'Last Name' (Garlic), 'Date Of Birth' (01/01/2001), 'Sex' (Male), 'Insured Telephone', 'Insurance Plan Name', and 'Employer Name/School Name'. The 'Insured Address' section includes fields for 'Address Line' (123 main street), 'City' (phila), 'State' (PA), and 'Zip code' (19111). Red arrows point to the 'Carrier Name' dropdown, the 'Patient Relationship to the Payer' dropdown, and the 'Insured ID Number' and 'Group Number' input fields.

Member ID No.	Group No.	Insured Name	DOB	Sex	Relation
12345		Garlic, Gregory	01/01/2001	Male	Self

5. Use the right-side drop down to indicate which plan is primary vs secondary.

The screenshot shows the 'Edit Insurance Details' form for a patient named Sylvia, Spaghetti. The form is divided into several sections. The 'Carriers' section lists 'Aetna (Payer ID: 60054)' and 'Forward Health (Payer ID: 20413)' with a table of member information. The 'Aetna' carrier has a dropdown menu set to 'Primary', and the 'Forward Health' carrier has a dropdown menu set to 'Secondary'. Red arrows point to these dropdown menus. The 'Add Carrier' button is also visible. The 'Insurance Details' section includes fields for 'Carrier Name', 'Participate With Carrier', 'Patient Relationship to the Payer', 'Release Information To Provider', 'Insured ID Number', and 'Group Number'. The 'Insured Details' section includes fields for 'First Name', 'Middle Name', 'Last Name', 'Date Of Birth', 'Sex', 'Insured Telephone', 'Insurance Plan Name', and 'Employer Name/School Name'. The 'Insured Address' section includes fields for 'Address Line', 'City', 'State', and 'Zip code'.

Member ID No.	Group No.	Insured Name	DOB	Sex	Relation
2345678	87654	Spaghetti, Sylvia	01/01/2001	Female	Self