

## Insurance Modifications

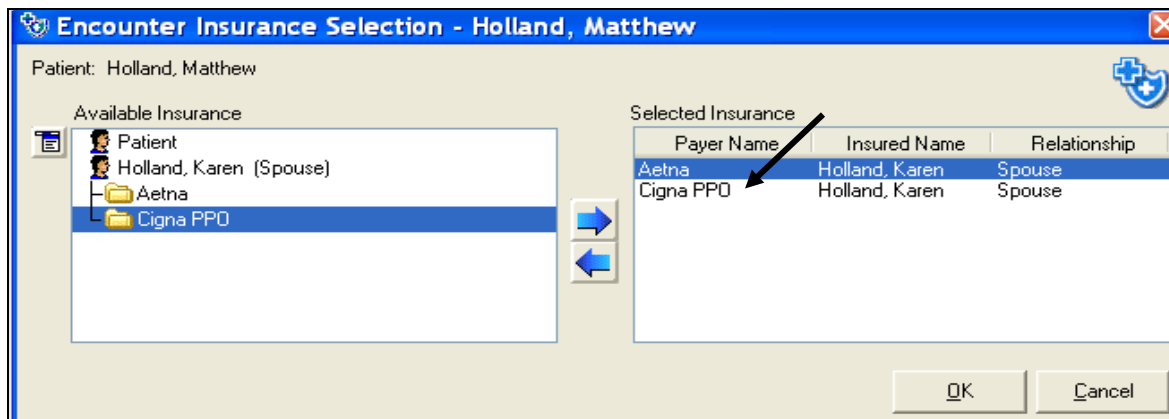
### Remove Incorrect Insurance from Encounter to be Rebilled

An encounter was billed to the wrong insurance, Aetna. It should have been billed to Cigna PPO.

1. Add the correct insurance under the appropriate policy holder. Use the blue up/down arrows to move the insurances into the correct order.



2. Add the correct insurance to the encounter. The incorrect insurance cannot be removed until after the next step. Click **OK**.



3. Access the Balance Control window to move the new insurance to be primary on the encounter by use of the blue up arrow.

**Balance Control - Holland, Matthew**

Encounter ID: 286      Patient Name: Holland, Matthew  
 Encounter Date: 07/26/2006      Guarantor Name: Holland, Matthew  
 Enc Status: Billed

Insurance	Insured	Policy Nbr	CoPay	Deductible
Aetna	Holland, Karen	837464538	\$20.00	\$0.00
Cigna PPO	Holland, Karen	823764783401	\$10.00	\$0.00

Charge Information

SIM	Amount	Ins1 Amt	R	Ins2 Amt	R	Ins3 Amt	R	Pat Amt	Ln Item Bal
99212	\$80.00	60.00		0.00		0.00		\$0.00	60.00
85610	\$15.00	15.00		0.00		0.00		\$0.00	15.00
81002	\$25.00	25.00		0.00		0.00		\$0.00	25.00
<input type="checkbox"/> Rebill Encounter		\$100.00		\$0.00		\$0.00		\$0.00	\$100.00

Prorate    OK    Cancel

4. When prompted as seen below, click **No** to keep the charge balances in the **Ins1 Amt** bucket. The new insurance is now primary on the encounter

**Balance Control - Holland, Matthew**

Encounter ID: 286      Patient Name: Holland, Matthew  
 Encounter Date: 07/26/2006      Guarantor Name: Holland, Matthew  
 Enc Status: Billed

NextGen

? Would you like the insurance amounts to follow?

Yes    No

Prorate    OK    Cancel

- Click on each charge to be rebilled to the new insurance in the **R** column. The Rebill Encounter checkbox will be selected automatically. Click **OK**.

**Balance Control - Holland, Matthew**

Encounter ID: 286      Patient Name: Holland, Matthew  
 Encounter Date: 07/26/2006      Guarantor Name: Holland, Matthew  
 Enc Status: Rebill

Insurance	Insured	Policy Nbr	CoPay	Deductible
Cigna PPO	Holland, Karen	823764783401	\$10.00	\$0.00
Aetna	Holland, Karen	837464538	\$20.00	\$0.00

Charge Information

SIM	Amount	Ins1 Amt	R	Ins2 Amt	R	Ins3 Amt	R	Pat Amt	Ln Item Bal
99212	\$80.00	60.00	<input checked="" type="checkbox"/>	0.00		0.00		\$0.00	60.00
85610	\$15.00	15.00	<input checked="" type="checkbox"/>	0.00		0.00		\$0.00	15.00
81002	\$25.00	25.00	<input checked="" type="checkbox"/>	0.00		0.00		\$0.00	25.00
<input checked="" type="checkbox"/> Rebill Encounter		\$100.00		\$0.00		\$0.00		\$0.00	\$100.00

Prorate    OK    Cancel

- Remove the incorrect insurance from the encounter by use of the blue left arrow. If this is not done, it could be mistakenly billed as secondary after payment is received from the new primary insurance.

**Encounter Insurance Selection - Holland, Matthew**

Patient: Holland, Matthew

Available Insurance

- Patient
  - Holland, Karen (Spouse)
    - Cigna PPO
    - Aetna

Selected Insurance

Payer Name	Insured Name	Relationship
Cigna PPO	Holland, Karen	Spouse
Aetna	Holland, Karen	Spouse

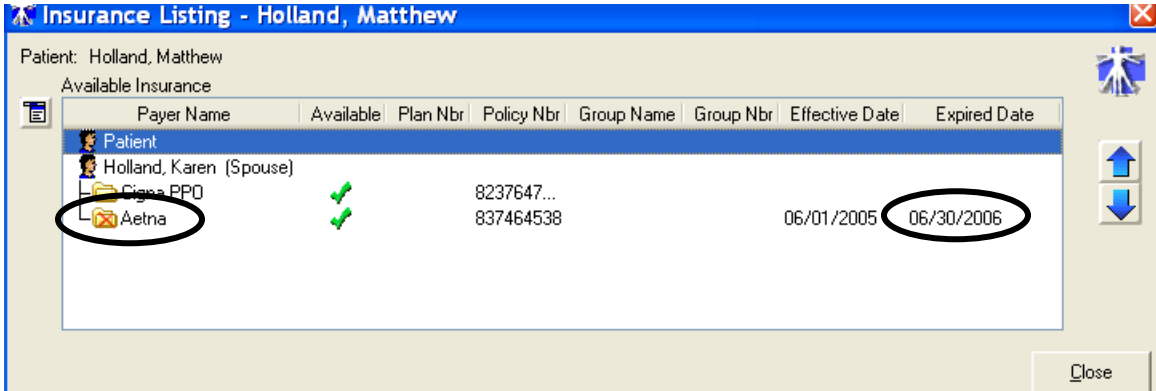
OK    Cancel

7. When prompted as seen below, click **Yes** to remove the incorrect insurance from the encounter even though a claim had been previously filed.

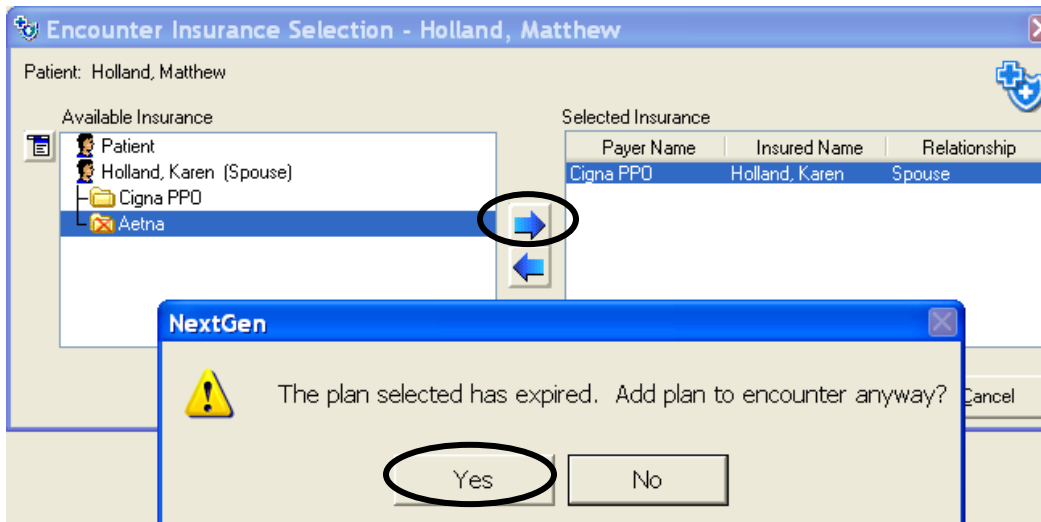


**Expire Incorrect Insurance**

1. Add an Expiration Date to the incorrect insurance. The insurance now has a red X indicator.



2. There is still potential to add the incorrect insurance to future encounters if the user answers the following prompt with **Yes**.



### Inactivate Incorrect Insurance

1. Uncheck the **Active** checkbox for the incorrect insurance.

**Insurance Maintenance - Holland, Karen**

Insured: Holland, Karen  
Payer: Aetna  
Insured SSN:

Insurance Type: Commercial  
Financial Class: Commercial  
Managed Care Plan:

NEIC Number:  
Claim Type: Commercial

**Ins Detail** | Ins Card | Authorizations | Eligibility/Referral | External

Plan Name: Aetna

Plan Number: [ ] HIC/Policy Nbr: 837464538 (Ctrl-S for SSN)

Group Name: [ ] Group Number: [ ]

Address: PO Box 8374

City: Westminster State: CO (Colorado) Zip: 80021

Country: USA County: Jefferson

Contact: Last Name: [ ] First Name: [ ] Middle Name: [ ]

Contact Phone: (800)736-4536 Ext: [ ] Fax: [ ]

Source of Signature: Signature authorization(12,13) E-Mail Address: [ ]

Employer Policy

Activation:  Active Effective Date: [ ] Expiration Date: [ ]

Make Insurance Primary on: [ ]

Practice Level: Co-Pay Type: Amount Co-Payment: \$20.00 Deductible: \$0.00

Percent  Notification Required  Verification Required  Authorization Required

Enc Co-payment: [ ]

Plan Code: [ ]

Policy Nbr for Holland, Matthew: [ ]

Co-Pay for Holland, Matthew: [ ]  Copay Exempt

Coverage: [ ] Note: [ ]

Who\When Scan OK Cancel

2. The incorrect insurance cannot be added to future encounters. It no longer displays in the Encounter Insurance Selection window.

**Encounter Insurance Selection - Holland, Matthew**

Patient: Holland, Matthew

Available Insurance:

- Patient
  - Holland, Karen (Spouse)
  - Cigna PPO

Selected Insurance:

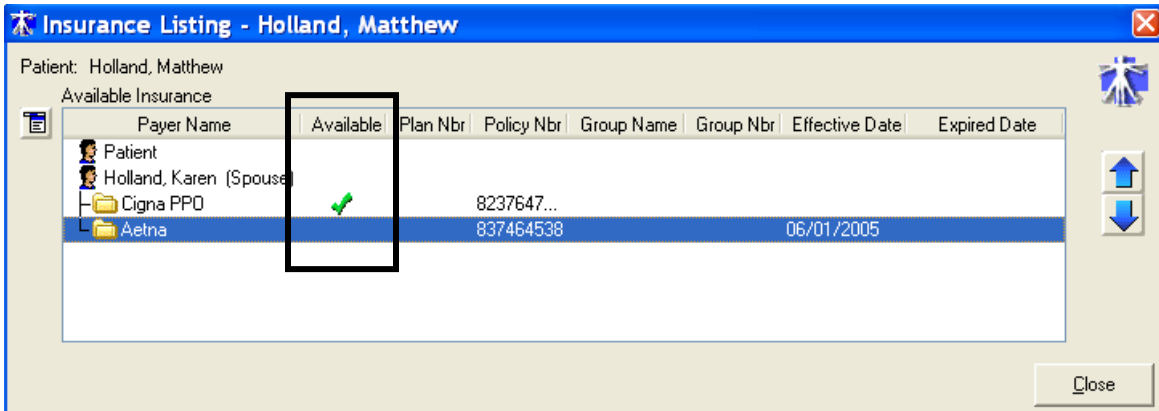
Payer Name	Insured Name	Relationship
Cigna PPO	Holland, Karen	Spouse

OK Cancel

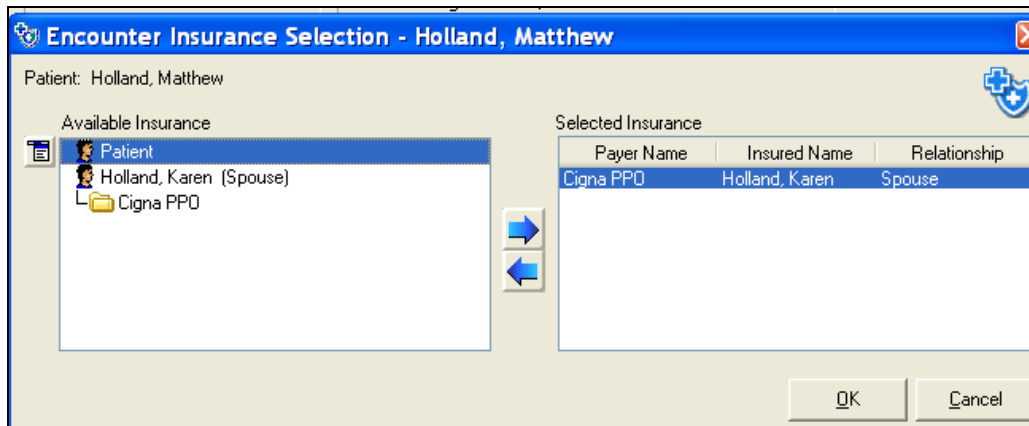
**Make Incorrect Insurance Unavailable**

**NOTE:** Making an insurance unavailable removes it from the patient's insurance selection window but not from the relation's insurance selection window.

1. Uncheck the **Available** checkmark for the incorrect insurance



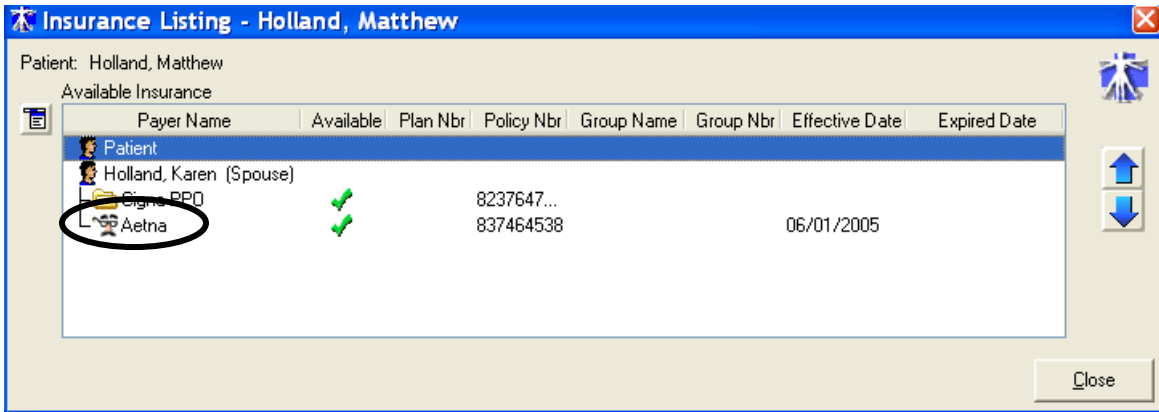
2. The incorrect insurance cannot be added to future encounters. It no longer displays in the Encounter Insurance Selection window.



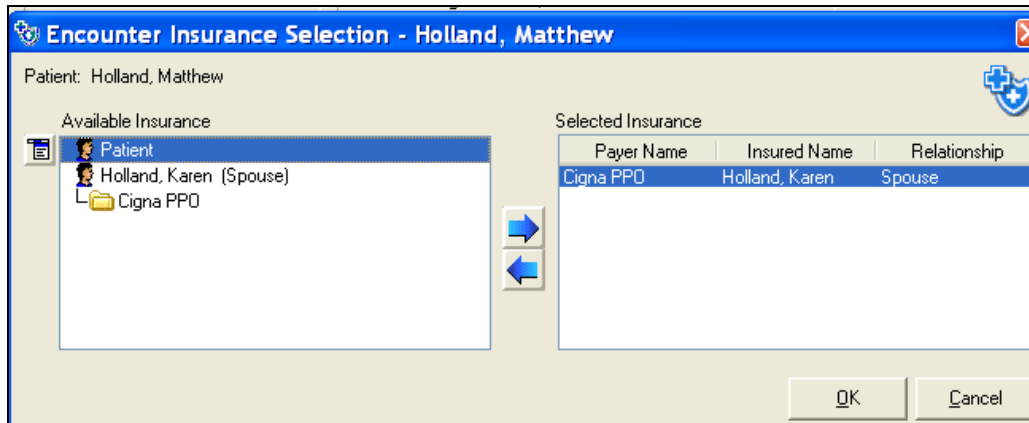
**Hide Incorrect Insurance**

**NOTE:** Hiding an insurance hides it for the patient AND all relations.

1. Hide the incorrect insurance.



2. The incorrect insurance cannot be added to future encounters. It no longer displays in the Encounter Insurance Selection window.



**Which Option(s) to Use?**

- If the insurance was never valid for the patient and entered in error, hide it.
- If the insurance was previously valid but is no longer valid and it is important to maintain effective/expiration dates for billing purposes, expire it and make it unavailable.