



Insurance Management – Sevocity Premier

We use this feature to manage all the responsible parties for an encounter or charge. This allows us the flexibility to maintaining multiple profiles for each patient. For instance, commercial insurance and workers comp.

What is a Profile? What is a Policy?

A **Policy** is the information on an insurance card. The Insurance, policy number, group number, policy holder, copay etc.

A **Profile** represents *all* the Insurances, Primary, Secondary, Tertiary *and* the ultimate Patient Responsibility. Patient Responsibility is a simple flag, 'Responsible' means the Guarantor will receive a statement, 'Not Responsible' means the guarantor will NOT receive a statement.

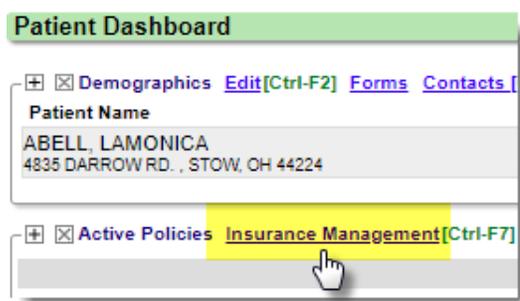
How is Default and/or Active used?

The **Default** Profile will automatically be assigned to new Encounters in charge entry, although it can be over-ridden. This is the most likely used.

Active indicates it is available to be selected during Charge entry. This is useful for workers compensation and auto accident claims.

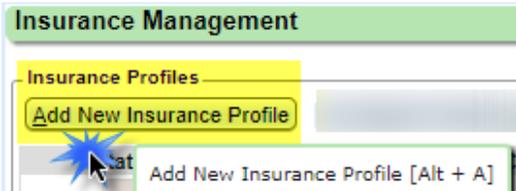
Profiles

How do I add a Profile to an existing patient?

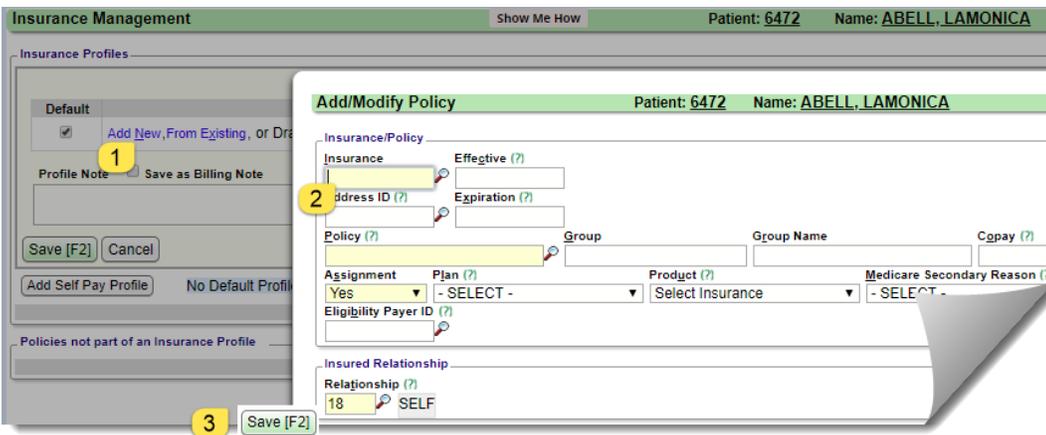


Click [Insurance Management](#) from the Patient Dashboard

Click [Add New Insurance Profile]



1. Click 'Add New'
2. Add Policy Information
3. [Save]



Insurance Management Show Me How Patient: 6472 Name: ABELL, LAMONICA

Insurance Profiles

Default Add New, From Existing, or Draft

Profile Note Save as Billing Note

Save [F2] Cancel

Add Self Pay Profile No Default Profile

Policies not part of an Insurance Profile

Add/Modify Policy Patient: 6472 Name: ABELL, LAMONICA

Insurance/Policy

Insurance Effective (?)

Address ID (?) Expiration (?)

Policy (?) Group Group Name Copay (?)

Assignment Plan (?) Product (?) Medicare Secondary Reason (?)

Yes - SELECT - Select Insurance - SELECT -

Eligibility Payer ID (?)

Insured Relationship

Relationship (?)

18 SELF

Save [F2]

4. Once the primary policy is saved, the 'Secondary' section opens. If applicable 'Add New' - Secondary policy > Save , 'Add New' Tertiary policy > Save



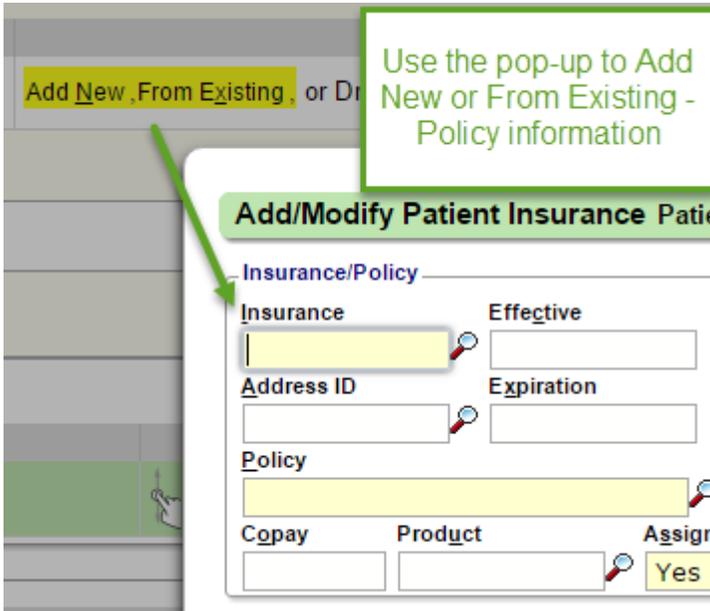
Once the *Profile* is deleted, the *Policies* that made up the profile drop into the 'Policies not part of an Insurance Profile' area. This gives the user the opportunity to reassign the policies into a different profile or delete them.

How do I add a Secondary to an existing profile?

On the Insurance Management page, Click on the word 'Default' or 'Active' of the profile you need to add t

Status	Encounters	Primary	Secondary	Tertiary	Patient	Effective	Expiration
Default	2	MEDICARE [MCR] (855) 252-8782 Policy: _____ Group: _____			Responsible		

- Click 'Add New' or from Existing
- In the Popup to add/edit **Policy** information > [Save]
- You may also add Tertiary and Save the **Profile**.



- If the changes affect encounters a checkbox appears. Pay special attention if you want to rebill at this time or not

Insurance Management Patient: 26437 Encounter: 35568 Name:

Insurance Profiles

Charges exist on this profile. Addition of policies is the only allowable function.

Default	Primary	Secondary	Tertiary	Patient	Effective
<input checked="" type="checkbox"/>	MEDICARE [MCR] (855) 252-8782 Policy: Group:	EDS/MEDICA [MCD] Policy: Group:	Add New, From Existing, or Drag and Drop here	Responsible	

Profile Note Save as Billing Note

For all encounters with a PATIENT balance, transfer to newly added policy and bill:

Once the Secondary, we can add a Tertiary. We may be presented with a suggestion to move any Patient Balances AND to BILL. -Un-check this box if it is not needed. Then SAVE the entire profile.

- Save the new profile

How do I expire a secondary?

I have a profile, the primary is still active, however the secondary is now expired.

1. Expire the secondary
 - Click on the policy



Find Patient/Guarantor > Patient Dashboard

Insurance Management Show Me How Patient: 8788 Name: O

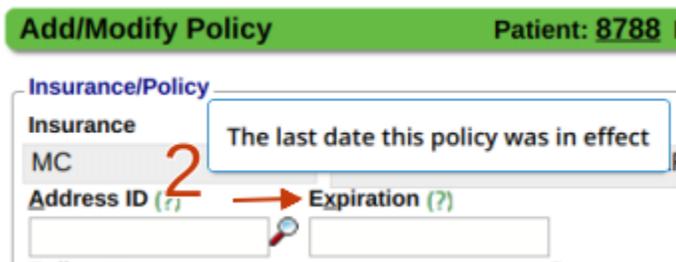
Insurance Profiles

[Add New Insurance Profile](#) [Add Self Pay Profile](#)

Status	Encounters	Created	Primary	Secondary
Default	1	09/01/2018	UNITED HEA [MLN] (877) 842-3210 Group: 907854	NOVITAS SO [MC] (855) 252- Policy: 438762220T Group:

Click to edit Policy

2. Add expiration date



Add/Modify Policy Patient: 8788

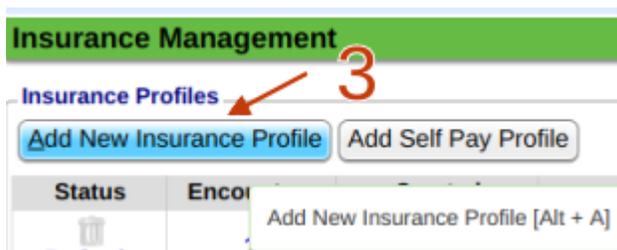
Insurance/Policy

Insurance
MC

The last date this policy was in effect

Address ID (?) → Expiration (?)

- Save
3. Add a NEW Profile



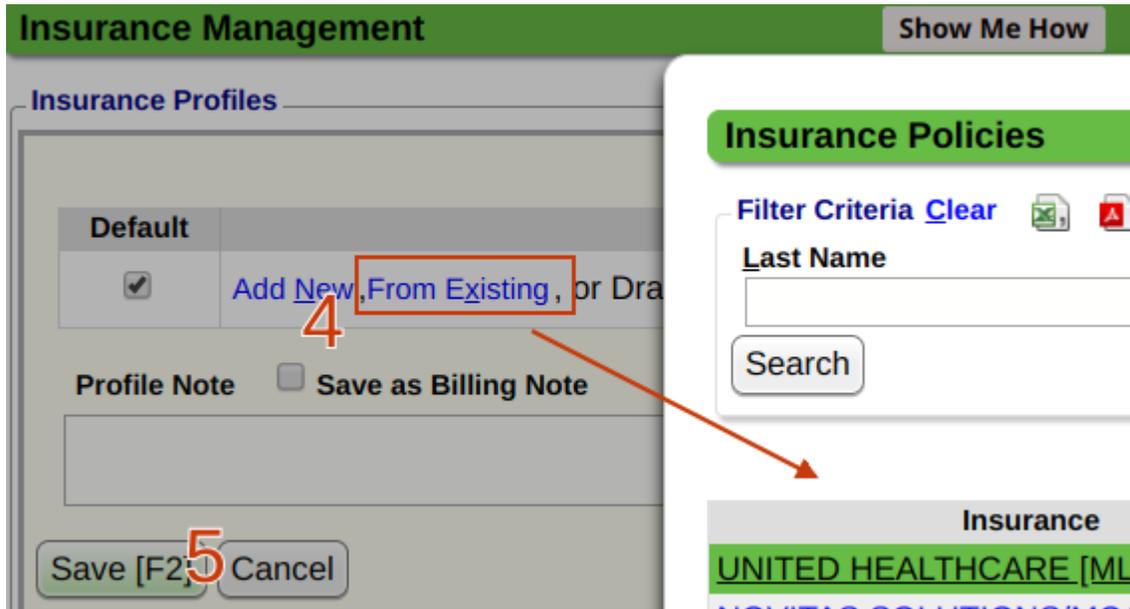
Insurance Management

Insurance Profiles

[Add New Insurance Profile](#) [Add Self Pay Profile](#)

Add New Insurance Profile [Alt + A]

4. Choose from Existing for the Primary if it is still active



Insurance Management [Show Me How](#)

Insurance Profiles

Default	Profile Note
<input checked="" type="checkbox"/>	<input type="checkbox"/> Save as Billing Note

Save [F2] Cancel

Insurance Policies

Filter Criteria [Clear](#)  

Last Name

Search

Insurance

UNITED HEALTHCARE [ML

5. Add a new secondary, with effective date or if Save the new profile

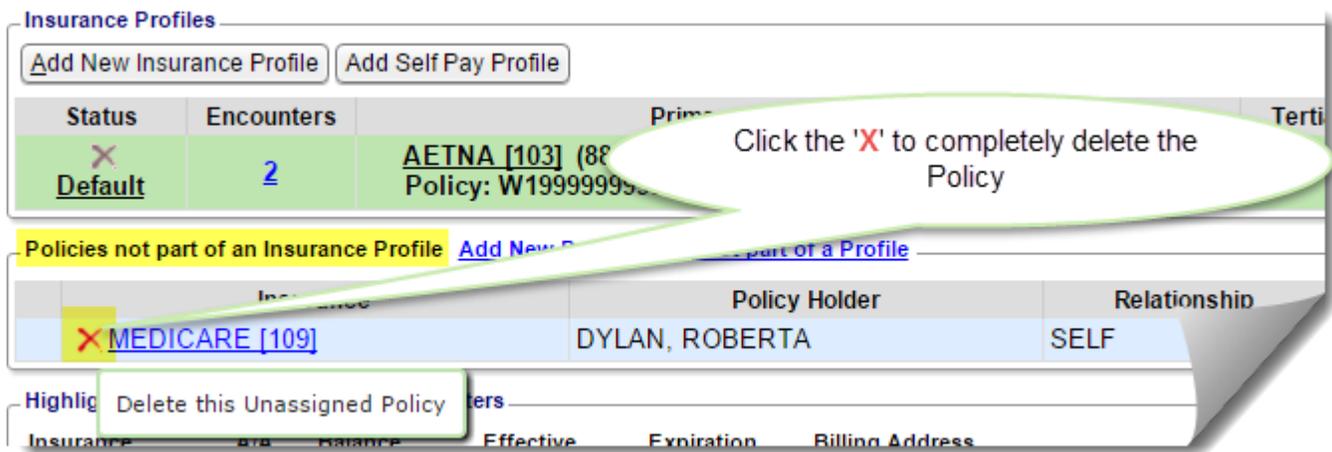
Policy

How do I delete an Insurance *Policy*?

From 'Insurance Management' (Patient Dashboard > Insurance Management)

- Click on the Red '**X**' above the word 'Default' or 'Active'. A confirmation will open above, enter the reason for deletion then click [Delete]

Note: A profile can *only* be deleted if there are no Encounters linked with the profile.



Insurance Profiles

[Add New Insurance Profile](#) [Add Self Pay Profile](#)

Status	Encounters	Primary	Tertiary
X Default	2	AETNA [103] (88) Policy: W19999995	

Policies not part of an Insurance Profile [Add New Policy](#) [Add Existing Policy](#) [Remove from Profile](#)

Insurance	Policy Holder	Relationship
X MEDICARE [109]	DYLAN, ROBERTA	SELF

Highlight [Delete this Unassigned Policy](#) [Add New Policy](#) [Add Existing Policy](#) [Remove from Profile](#)

Insurance **Policy Holder** **Relationship** **Effective** **Expiration** **Billing Address**

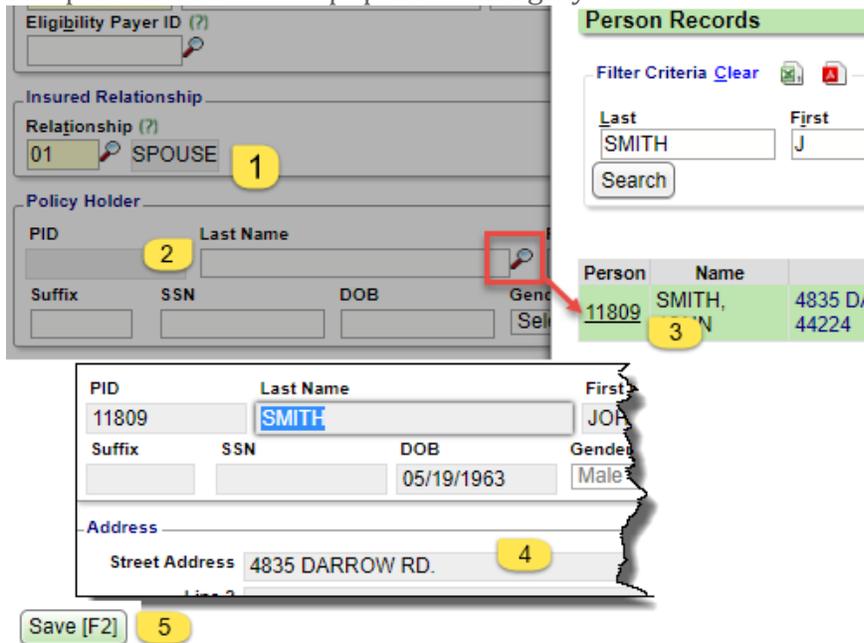
Once the *Profile* is deleted, the *Policies* that made up the profile drop into the 'Policies not part of an Insurance Profile' area. This gives the user the opportunity to reassign the policies into a different profile or delete them.

How do I edit policy holder address or DOB of an existing person?

At this time we have to 'save' the record before it can be edited.

1. When Adding New insurance policy, update the relationship if when it is not self. In our example, (01)- Spouse
2. In the last name field, lookup to choose an existing 'person'
3. Click the person ID

4. The person address etc populates and grays out



Person Records

Filter Criteria [Clear](#)  

Last: SMITH First: J

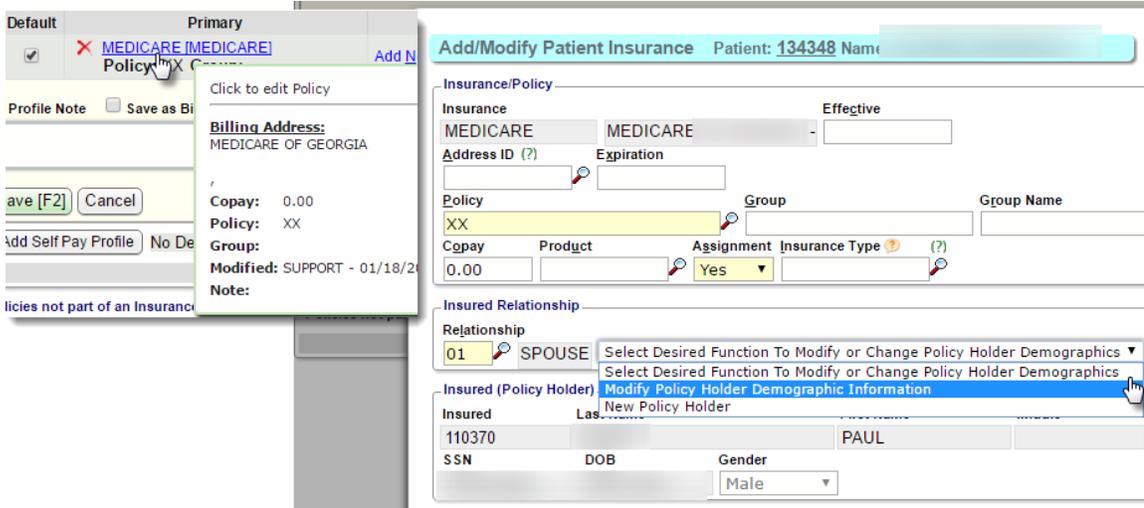
Search

Person	Name	Address
11809	SMITH, JOAN	4835 DARROW RD. 44224

Save [F2] (5)

5. [SAVE]

After saving > Click the Insurance hyperlink, to modify the Policy



Add/Modify Patient Insurance Patient: 134348 Name: [REDACTED]

Insurance/Policy

Insurance: MEDICARE MEDICARE Effective: [REDACTED]

Address ID (?): [REDACTED] Expiration: [REDACTED]

Policy: XX Group: [REDACTED] Group Name: [REDACTED]

Copay: 0.00 Product: [REDACTED] Assignment: Yes Insurance Type (?): [REDACTED]

Insured Relationship

Relationship: 01 SPOUSE

Insured (Policy Holder): [REDACTED]

Insured: 110370 Last Name: PAUL

SSN: [REDACTED] DOB: [REDACTED] Gender: Male



How do I indicate that Medicare is secondary?

Use the Medicare Secondary Reason dropdown to indicate why Medicare is secondary

Insurance/Policy

Insurance **MEDICARE - PO BOX 20019 NASHVILLE TN 37202** **Effective (?)**

Address ID (?) **Expiration (?)**

Policy (?) **Group** **Group Name** **Copay (?)**

Assignment **Plan (?)** **Product (?)** **Medicare Secondary Reason (?)**

- SELECT -

- 12 - Medicare Secondary Working Aged Beneficiary or Spouse with Employer Group Health Plan
- 13 - Medicare Secondary End-Stage Renal Disease Beneficiary in the 12 month coordination period with an employers group health plan
- 14 - Medicare Secondary, No-fault Insurance including Auto is Primary
- 15 - Medicare Secondary Workers Compensation
- 16 - Medicare Secondary Public Health Service (PHS) or Other Federal Agency
- 41 - Medicare Secondary Black Lung
- 42 - Medicare Secondary Veterans Administration
- 43 - Medicare Secondary Disabled Beneficiary Under Age 65 with Large Group Health Plan (LGHP)
- 47 - Medicare Secondary, Other Liability Insurance is Primary

How do I use Plan and Product

1. **Plan** -The Plan drop-down contains the ANSI Plans
 - o If you are using our eligibility verification service, the eligibility results will auto-update the patient's Plan information if the data is included in the results.
2. **Product** drop-down with options and options can be managed in the Insurance Library, or by clicking -Manage- in the drop-down (if your permissions allow)
 - o If you are using our eligibility verification service, the eligibility results will auto-update the patient's Product information if the data is included in the results.

Add/Modify Patient Insurance Patient: 20001 Name: MOUSE, MINNIE

Insurance/Policy

Insurance: 110 AETNA - PO BOX 981106 EL PASO TX 79998-1106 Effective:

Address ID: Expiration:

Policy: 456 Group: Group Name:

Assignment: Yes Plan: Disability [D] Product: PROD 1 Medicare Secondary Reason: - SELECT -

Insurance List:

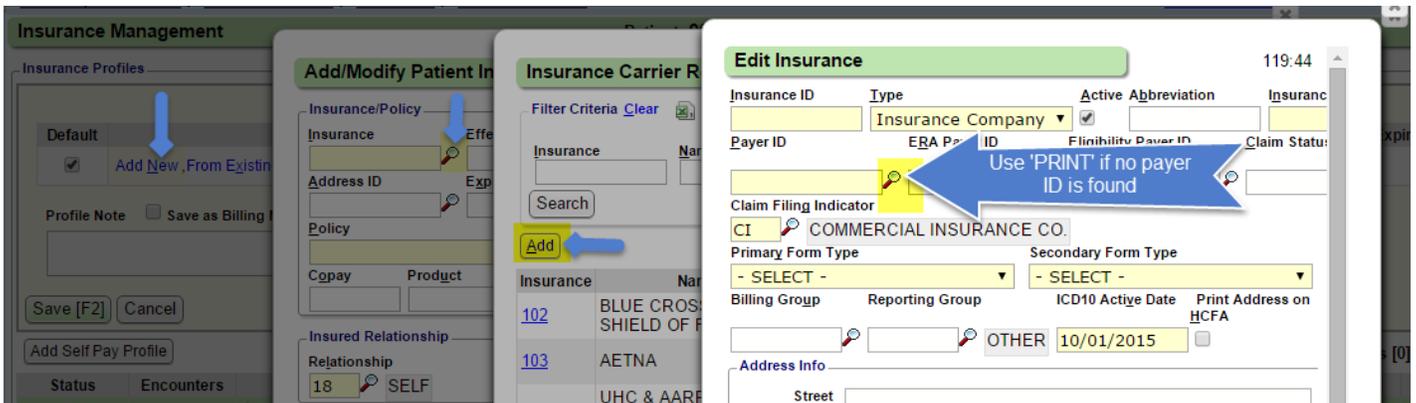
- SELECT -
- PROD 1
- PROD 2**
- MANAGE -

Insurance

How do I add a new Insurance to the system from Insurance Management

We all you to add to the Insurance Libraries 'on the fly' while adding a patient's insurance:

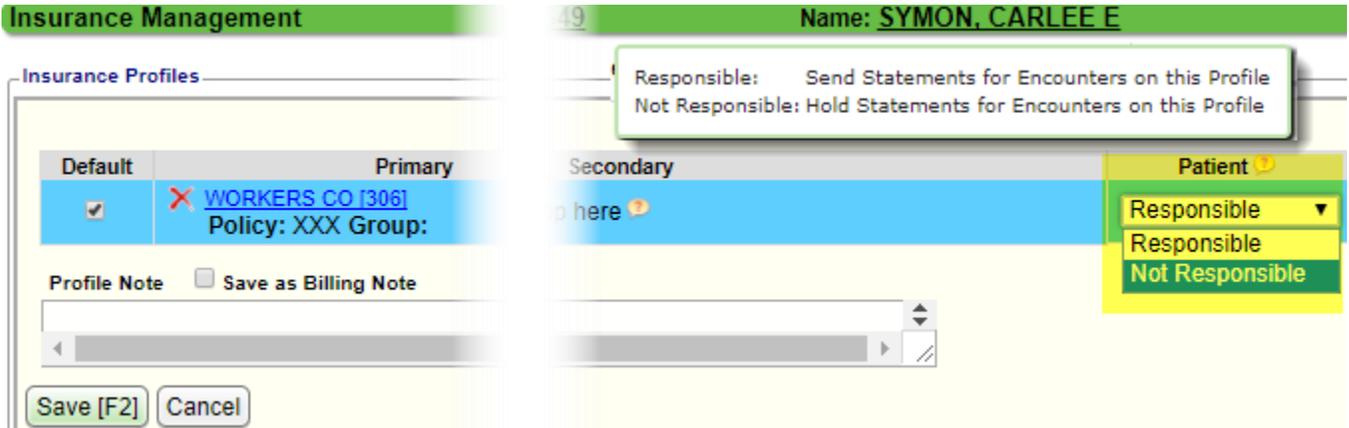
When adding a new profile > 'Add New' link > Click the Magnifier, [Add], key in new insurance and [SAVE]



Patient responsibility - Statement

How can I be sure that no statements are sent to patient for encounters with this profile?

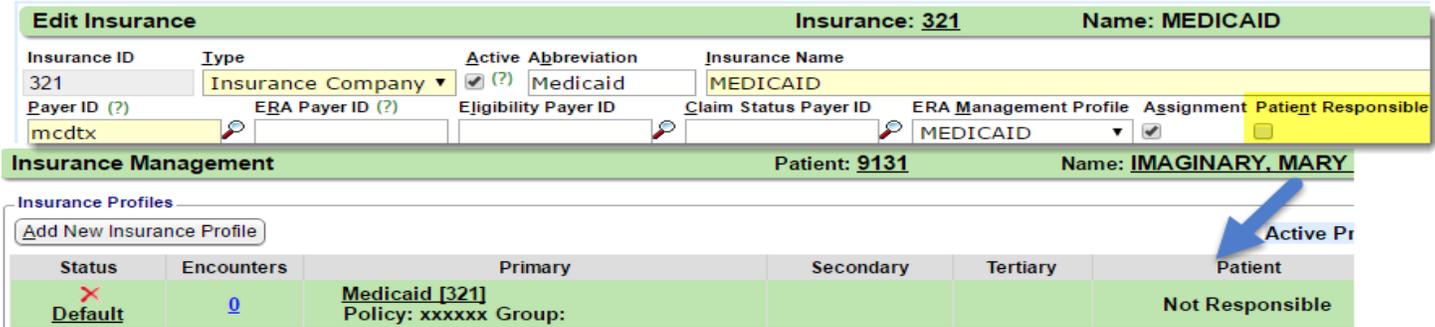
In the Profile, use the 'Patient' drop-down to indicate 'Not responsible'



How do I make the Patient 'Not Responsible' for all profiles with this insurance?

'Not Responsible' means this patient will not receive any statement for encounters affiliated with this Profile.

Go to the Insurance Library > Edit > un-check 'Patient Responsible'
 Now, all Insurance Profiles that are built after this change, with this insurance will save with the Patient portion being 'Not Responsible'





How should I use the section Add New Policy that is not part of a Profile?

This is used as a 'bank' or holding card for policy information we may use at a future date. For instance, the client has an HMO Medicare replacement product, but has given us their Medicare card too. We may want to save the Medicare policy to use later once we determine the correct coverage. When we delete an Insurance, it falls to this 'bank' area, in case we simply need to add it to a different profile.

Insurance Management		Patient: 70864	Name: [REDACTED]
- Insurance Profiles			
Add New Insurance Profile	Add Self Pay Profile	No Default Profile Specified	Active Profiles [0] <input type="radio"/>
There are no records available			
- Policies not part of an Insurance Profile			
Add New Policy that is not part of a Profile			
There are no records available			

Re-Bill

How do I re-bill or resend multiple encounters to insurance?

On the insurance management page, we have a Rebill and Change profile and Rebill that allows us to resend multiple encounters to the payer.

1. Highlight the profile with the encounters you want to rebill
 - o Look to the 'Highlighted profile Information & encounters' section

Insurance Management

Insurance Profiles

[Add New Insurance Profile](#)

Status	Encounters	Created
Default	10	04/17/2014
Active	0	04/14/2014

Policies not part of an Insurance Profile [Add New](#)

Highlighted Profile Information & Encounters

Insurance	A/A	Balance	Effective
RAILROAD M	Y	475.00	
C AND O HO	Y	45.82	

[Change Profile/Rebill](#) [Rebill Only](#)

- Choose the individual encounter(s) that should be rebilled **or** use the top checkbox to 'Select All'
- Choose to either [Rebill only] or [Change Profile Rebill]

[Change Profile/Rebill](#) [Rebill Only](#) **3**

Encounter	<input type="checkbox"/>	DOS
64839	<input checked="" type="checkbox"/>	08/03/2016
64857	<input checked="" type="checkbox"/>	08/02/2016
64444	<input type="checkbox"/>	08/01/2016
64176	<input type="checkbox"/>	07/31/2016

2 **OR**

Select All

4. In the newly opened section, be sure the 'rebill' box is checked

Highlighted Profile Information & Encounters

Selected Encounters
64839,64857

From Current Profile
RAILROAD M (WA227249581) / C AND O HO (CO

Re-Bill **4**
Will set selected claims for re-submission

Claim His

Save [F2] **5**

Insurance	A/A	Balance	Effective
RAILROAD M	Y	475.00	
C AND O HO	Y	45.82	

Change Profile/Rebill

5. [SAVE]

How do I move encounters from one profile to another and rebill?

1. Click to highlight the profile- in our example we are moving e45150 from self pay to Aetna
2. Check in the check box next to the encounter (s) you want to move
3. Click [Change Profile/Rebill]
4. A new section opens, it lists the selected encounter(s), Current Profile, and the NEW profile you are moving to
5. Choose where the Patient balance goes from the dropdown
6. Add a Note

7. [Save]

Insurance Management Patient: **8705**

Insurance Profiles

[Add New Insurance Profile](#) [No Default Profile S](#)

Status	Encounters	
<input checked="" type="checkbox"/> Active	1 1	SELF PAY
<input checked="" type="checkbox"/> Active	2 2	AETNA [103] (88 Policy: W199999

Highlighted Profile Information & Encounters

Selected Encounters

45150 **4**

From Current Profile

SELF PAY

To New Profile

[AETNA / PATIENT \[No Effective - No Expiration\]](#) ▾

Transfer Balance From Patient To **5** Re-Bill

Transfer Balance From Patient To

LEAVE BALANCE WITH PATIENT ▾

(PRIMARY) AETNA [103]

LEAVE BALANCE WITH PATIENT **6**

[Save \[F2\]](#) **7** [Cancel](#)

Policies not part of an Insurance Profile [Add New Po](#)

Highlighted Profile Information & Encounters

[Change Profile/Rebill](#) [Rebill Only](#)

Encounter	<input type="checkbox"/>	DOS				
45150	<input checked="" type="checkbox"/>	02/25/2016 2	78.50	0.00	0.00	0.00

When you add a secondary or Tertiary to an existing profile you are presented with the ability to move encounters from 'patient' responsibility to the newly added policy. Use with caution, there may be some encounters associated with this profile that you don't want filed to the new insurance.

Charges exist on this profile. Addition of policies is the only allowable function.

Default	Primary	Secondary
<input checked="" type="checkbox"/>	RAILROAD M [133] (877) 288-7600 ;1 Group:	C AND O HO [138] (800) 679-9135 Polic oup:

Profile Note Save as Billing Note

For all encounters with a PATIENT balance, transfer to newly added policy and bill:

[Save \[F2\]](#) [Cancel](#)

Can I change the charge fee on an encounter by changing the Insurance profile?

No. The charge fee must be updated from the encounter. Go to the 'Modify Charge' screen > toggle the Insurance drop down. If the insurance or self pay has a different charge fee > OK in the popup



Ctrl+Ctrl **GO!**

Modify Charge

Post Date: 01/23/2019

Patient

Patient: 1192 8 year

Last Service: 01/23/2019 (1)

Case: - SELECT - [Edit](#)

Quarar

Appointment(s): None (1)

Authorization: - SELECT - [Edit](#)

Insurance: SELF PAY
MEDICARE / MUTUAL OF
SELF PAY

Changing the Insurance Profile will cause the Fees to change for 1 or more Procedures. Click OK to apply the change or click Cancel to maintain current Fees.

OK Cancel