

## **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/Modify Policy	Patient: <u>6472</u> Name: <u>A B</u>	ELL, LAMONICA
Profile Note Save as Billing Note	Insurance Effective (?)  Idress ID (?) Expiration (?)  Policy (?)	Group Nam	а Саран (7)
Save [F2] Cancel	Assignment Plan (2)	Product (2)	Medicare Secondary Reason (2)
Add Self Pay Profile No Default Profile	Yes ▼ SELECT - Eligibility Payer ID (?)	Select Insurance	▼ - SELE^T -
3 Save [F2]	Insured Relationship Relationship (?) 18 SELF		

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



#### 5. [Save] the profile

Insurance Pr	ofiles	
Default	Primary	Secondary
	X UHC [104] (866) 230-5740 Policy: 999999 Group:	Add New, From Existing, or Drag and Drop here
Profile No	te 🔲 Save as Billing Note	4
1		
Save [F2]	5 cel	

### How do I delete an Insurance profile?

- 1. Go to 'Insurance Management' (Patient Dashboard > Insurance Management)
- 2. 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 Manag	gement		Patient: <u>8705</u>	Name: DYLA	N, ROBERTA			
Insurance Profiles								
Are you sure you wa	ant to delete	this Profile? The associated Policies may be pla	ced in the 'Policies not part o	f an Insurance Pro	ofile' section to delete or	to be used in an	other Profile.	
Please Enter Reaso	Please Enter Reason: INCORRECT patient ID							
Cancer Delete								
Add New Insurance Profile Add Self Pay Profile					Active Profiles [2]	Include In	active Profi	
Status End	counters	Primary	Secondary	Tertiary	Patient	Effective	Expirati	
Deferrit	0	<u>MED [109]</u> (877) 847-4992 Policy: XXXXXXXXA Group:			Responsible			
Delete this Profile         AETNA [103]         (888) 632-3862           Active         Policy:         W1999999999999999999999999999999999999					Responsible			
Policies not part of a	n Insurance	Profile Add New Policy that is not part of a Profi	<u>le</u>				r	



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

Insurance Man	agement		Patient: <u>26437</u>		Encoun	ter: <u>35568</u>	Name:		
Insurance Profiles Click Default to add the second			idary			Active Profiles	; [1] 🖲   Include	nactive Profiles	
Status	Encounters		Primary	Seco	ndary	Tertiary	Patient	Effective	Expiration
Default         2         MEDICARE [MCR] (855) 252-8782           Policy:         Group:					Responsible				
Policie Click to e	dit Insurance Pr	ofile Add New Policy that is r	not part of a Profile						
		_	There are	no records a	vallable				

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



A dal/Ma diffe Dati	
Add/wodity Pate Insurance/Policy	Effective

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

Insuranc	e Management		Patient: 26437	Encounter: <u>35568</u>	Name:	
Insurance	Profiles					
Charge	s exist on this profile. Addition of policies	s is the only allowable function.				
Defaul	t Primary	Secondary		Tertiary	Patient 🤨	Effective
	MEDICARE [MCR] (855) 252-8782 Policy: Group:	EDS/MEDICA [MCD] Policy: Group:	Add <u>N</u> ew,From	E <u>x</u> isting, or Drag and Drop here 🦻	Responsible •	
Profile	Note Save as Billing Note		Once	the Secondary, we can add	a Tertiary We may	be presented
			with	a suggestion to move any Pat	tient Balances AND	to BILL
For all er	ncounters with a PATIENT balance, trans	sfer to newly added policy and bi	-Un-c	TRECK THIS DOX IF IT IS NOT NEED	ea. Then SAVE the e	entire profile.
Save [F	2] Cancel					

• 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 I	Management	:	Show Me How	Patient: <u>8788</u> Na					
Add New Insurance Profile Add Self Pay Profile			file	1					
Status	Encounters	Created	Primary	× 1	Secondary				
<u>Default</u>	1	09/01/2018	UNITED HEA [MLN] (877) 842-3210 roup: 907854	<u>NOVITAS SO [MC]</u> (855) 2 Policy: 4387220007 Conv					
					<ul> <li>Click to edit Policy</li> </ul>				

2. Add expiration date



- Save
- 3. Add a NEW Profile





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

Insurance Management	Show Me How
Insurance Profiles	Insurance Policies
Default Add New, From Existing, or Dra Profile Note Save as Billing Note	Filter Criteria <u>C</u> lear , Last Name Search
Save [F2] Cancel	Insurance

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 Self Pay Profile									
Status	Encounters		Prime				Terti		
× <u>Default</u>	2	<u>AETNA [103]</u> Policy: W199	(88) 99995-	Click the 'X' to completely delete the Policy			e		
- Policies not par	Policies not part of an Insurance Profile Add New Policies not a Profile								
	les:	C.	Pol	cy Holder		Relatio	onship		
XMEDIC	CARE [109]		DYLAN, ROBER	TA	5	SELF			
Highlig Delete this Unassigned Policy ers Insurance ere parance 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

Eligi <u>b</u> ility Paye	Eligibility Payer ID (?)					Person Records			
_Insured Relation	onship			_	-Filter (	Criteria <u>C</u> lear	×.	<u>a</u> –	
Rela <u>t</u> ionship (	?)				Last		Firs	st	
01 👂 S	POUSE 1				SMIT	н	J		
_Policy Holder.					Searc	ch			
PID	Last Nan	ne							
Cuffin		DOR		Carre	Person	Name			
Sum	5 SIN			Sel	<u>11809</u>	SMITH,	48	35 D/ 224	
PID 11809 Suffix	SSN	ast Name SMITH	DOB 05/19/1963		First JOA Gender Male				
Addres Stree Save [F2]	et Address 48	35 DARROW	/ RD.	4		;			
5. [SAVE]									

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

Default P	rimary			
	EDICARE] Add N	Add/Modify Patier	nt Insurance Patient: 134348	Name
Profile Note Save as Bi	Click to edit Policy	Insurance/Policy	Ef	fe <u>c</u> tive
	Billing Address: MEDICARE OF GEORGIA	MEDICARE Address ID (?)	MEDICARE -	
ave [F2] Cancel	, Copay: 0.00 Policy: XX	Policy	Group	G <u>r</u> oup Name
Add Self Pay Profile No De	Group: Modified: SUPPORT - 01/18/20	Copay Product	Assignment Insuranc	e Type 🤔 (?)
licies not part of an Insurance	Note:	Insured Relationship –		
		01 P SPOUSE	Select Desired Function To Modify Select Desired Function To Modify	v or Change Policy Holder Demographics 🔻
		Insured (Policy Holder)	Modify Policy Holder Demographi New Policy Holder	c Information
		110370		PAUL
		SSN D	OB 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				Effective	(?)	
le. Addition o	109 🎤	MEDICARE - PO	BOX 20019 N	ASHVILLE TN 3	7202		
	Address ID (?)	Expiration (?)					
		<b>,</b>					
127] (800) 30	Policy (?)		<u>G</u> roup		G <u>r</u> oup Name		C <u>o</u> pay (?)
1332949 Gr	XXXXXXXXXX	P					
	Assignment Pla	in (?)	Pro	od <u>u</u> ct (?)		Medicare Seconda	ry Reason (?)
Billing Note	Yes 🔻 - S	SELECT -	Υ -	SELECT -	•	- SELECT -	•
- SELECT -							
12 - Medicare Se	econdary Working Ag	ed Beneficiary or Sp	pouse with Emp	ployer Group He	alth Plan		
13 - Medicare Se	econdary End-Stage	Renal Disease Bene	eficiary in the 1	2 month coordina	ation period wi	th an employers g	roup health plan
14 - Medicare Se	econdary, No-fault Ins	urance including Au	uto is Primary				
15 - Medicare Se	econdary Workers Co	mpensation					
16 - Medicare Se	econdary Public Healt	th Service (PHS) or	Other Federal	Agency			
41 - Medicare Se	econdary Black Lung						
42 - Medicare Se	econdary Veterans Ac	Iministration					
43 - Medicare Se	econdary Disabled Be	eneficiary Under Age	e 65 with Large	Group Health P	lan (LGHP)		
47 - Medicare Se	econdary, Other Liabi	lity Insurance is Prin	mary				

### How do I use Plan and Product

- 1. Plan The Plan drop-down contains the ANSI Plans
  - If you are using our eligibility verification service, the eligibility results will autoupdate 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)
  - If you are using our eligibility verification service, the eligibility results will autoupdate the patient's Product information if the data is included in the results.



± <u>66884</u> □ °	10110017	a a provide for each			
₩ 66887	Add/Modify Pa	atient Insurance	Patient: 20001 Name: MOUS	SE, MINNIE	
🗄 🛛 Active Policies 📗	Incurance/Delieu				
Insurance	Insurance/Policy			Effective	
AETNA [110]	110	AETNA - PO B	OX 981106 EL PASO TX 7999	8-1106	
MEDICAL MU [127]	Address ID	Expiration			
MEDICAID [108]		₽			
+ Notes Add	Policy		Group	Group Name	c
Date	456 Assignment	Dian	Product	Medicare Second	ary Reason
07/31/2017 E	Yes v	Disability [D]	▼ PROD 1	SELECT -	ary reason
+ Patient Appointmen	its schedule Recan				
- SELECT -					
PROD 1					
PROD 2					
- MANAGE -					



## How do I add a street address to an existing Insurance?

In the Address ID field use the lookup then click [Add]

HIPAA Privacy Document Signed		117:51	
Filter Criteria <u>C</u> lear	C <u>ity</u>	Address Zip	
Address ID Add		Page Size: 50 ▼	
Address ID     Name       1234     BLUE CROSS       Form Type     2nd Form Type	Click the magnif address doesn' using a naming PO Box or stre	fying icon next to Address 't exist> Click [ADD]. We s convention for the ID base eet address then [Save] an	ID, if the suggest d on the id use.
02     P     ELECTRONIC     02     P     ELECTRONIC       Address     City       PO BOX 1234   Phone/Ext		S <u>t</u> ate	<u>Z</u> IP
Alea Phone Ext			



#### 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]

Insurance Management			
Insurance Profiles	Add/Modify Patient In	Insurance Carrier R	Edit Insurance 119:44
	Insurance/Policy	Filter Criteria <u>C</u> lear	Insurance ID Type <u>Active Abbreviation</u> Insurance
Default	Insurance Effe	Insurance <u>N</u> ar	Payer ID ERA Por ID Flinibility Payer ID Claim Statu:
Add <u>N</u> ew , From E <u>x</u> istin	Address ID Exp		ID is found
Profile Note Save as Billing I	Policy	Search	Claim Filing Indicator
		Add	Primary Form Type Secondary Form Type
	Copay Product	Insurance Nar	- SELECT - V - SELECT - V
Save [F2] Cancel		102 BLUE CROS	Billing Group Reporting Group ICD10 Active Date Print Address on <u>H</u> CFA
Add Oalf Day Drafta	Insured Relationship	SHILLD OF I	P OTHER 10/01/2015
Aud Sell Pay Fiblile	Relationship	<u>103</u> AETNA	Address Info
Status Encounters	18 P SELF	UHC & AARF	Street

## **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'



Insurance Management		49 Name: <u>SYMON, CARLEE E</u>					
Insurance Profiles		Responsible: Send Statement: Not Responsible: Hold Statements	s for Encounters on this Profile				
Default	Primary	Secondary	Patient 🥬				
	ERS CO [306] : XXX Group:	op here 왿	Responsible				
Profile Note Save	as Billing Note		Not Responsible				
4		¢  }					
Save [F2] Cancel							

# 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'

Edit Insurar	nce				Insuranc	e: <u>321</u>	Nam	e: MEDICA	AID
Insurance ID	<u>Т</u> уре		Active Abbreviation	Insurar	nce Name				
321	Insurance	e Company 🔻	(?) Medicaid	MEDI	CAID				
Payer ID (?)	E <u>R</u> A P	ayer ID (?)	Eligibility Payer ID	Claim Sta	tus Payer ID	ERA <u>M</u> a	nagement Profile	A <u>s</u> signment	Patient Respons
mcdtx	₽			2	Jan	MEDIC	CAID 🔻		
nsurance Management				Patient: 913	<u>1</u>	Name:	IMAGINAR	Y, MARY	
Insurance Profile	s								
Add New Insura	nce Profile								Active Pr
Status	Encounters		Primary		Seconda	ry	Tertiary	Pat	ient
<mark>≻</mark> Default	<u>0</u>	<u>Medicaid [3</u> Policy: xxx	<u>21]</u> xxx Group:					Not Res	ponsible



### 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:	
- Insurance Profiles			
Add New Insurance Profile Add Self Pay Profile No Default Profile Specified			Active Profiles [0] 🖲
	There are no record	ds available	
- Policies not part of an Insurance Profile Add New Policy that is not part of a Profile			
	There are no record	ds 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
  - Look to the 'Highlighted profile Information & encounters' section



Insurance Management							
Insurance Pro	files						
Add New Insurance Profile							
Status	Encounte	ers	Crea	ted			
X Default	<u>10</u>		04/17/2014				
× Active	Q		04/14/2014				
– Policies not part of an Insurance Profile <u>Add Nev</u>							
Highlighted Profile Information & Encounters							
Insurance	A/A	Bala	ance	Effective			
RAILROAD M	Y		475.00				
C AND O HO Y 45.82							
Change Profile/Rebill							

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





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

Highlighted Profile Information & Encounters						
Selected Encount	ters					
64839,64857						
From Current Pro	file					
RAILROAD M (	WA221	7249581) / C /	AND O HO (CO			
Re-Bill 🕖 🗾						
<b>a</b>						
Claim His Will se	t selec	ted claims for	re-submission			
•						
Save [F2]	el					
Insurance	A/A	Balance	Effective			
RAILROAD M	Y	475.00				
CAND 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]					
	nsurance M	<b>Management</b>			Pa	tient: <u>8705</u>
_	Insurance Pro	files				
	Add New Ins	urance Profile	No Default Pro	file S	Highlighted Profile Information & Encounter	ers
	Status	Encounters			Selected Encounters	
	Active	1	SELF PAY		45150 4 From Current Profile	
	Active	2	AETNA [103 Policy: W19	88) [8 89999	SELF PAY To New Profile	
	Policies not part of an Insurance Profile Add New Po			ew Po	AETNA / PATIENT [No Effective - Transfer Balance From Patient To	No Expiration] 5 Re-Bill (*)
					Transfer Balance From Patient To	
	- Highlighted Profile It 3 nation & Encounters				LEAVE BALANCE WITH PATIENT • (PRIMARY) AETNA [103]	e
	Change Pro	ofile/Rebill	ebill Only			6
	Encounter		DOS		Save [F2]	
	<u>45150</u>	2 5/2	016		78.50 0.00	0.00 0.

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

 Plant
 RAILROAD M [133] (877) 288-7600
 C AND O HO [138] (800) 679-9135

 Plant
 Polic
 oup:

Profile Note Save as Billing Note

 For all encounters with a PATIENT balance, transfer to newly added policy and bill: 
 Save [F2]



# 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

Modify Charge	Changing the Insurance Profile will cau more Procedures. Click OK to apply the	ise the Fees to change for 1 or e change or click Cancel to
Post Date: 01/23/2019	maintain current Fees.	
Patient: 1192	8 yea	OK Cancel
Last Service: 01/23/2019 (/)	Appointment(s): None (?)	
<u>C</u> ase: - SELECT -	Edit Authorization: - SELECT -	<u>_dit</u>
<u>G</u> uarar	Insurance: SELF PAY MEDICARE / MUTUAL OF SELF PAY	