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.

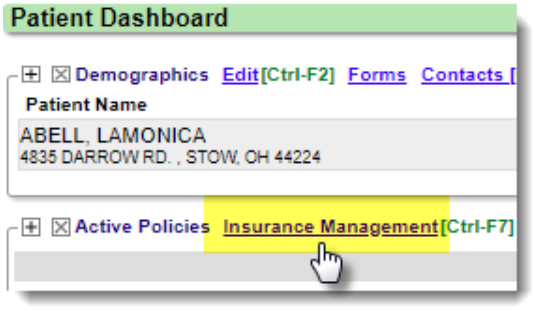
A **Profile** represents *all* the Insurances, Primary, Secondary, Tertiary *and* the ultimate Patient Responsibility. Patient Responsibility is a simple flag, 'Responsible' means the Guarantor will receive a statement, 'Not Responsible' means the guarantor will NOT receive a statement.

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

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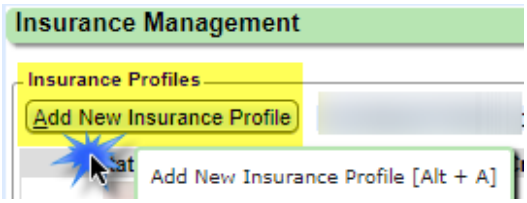
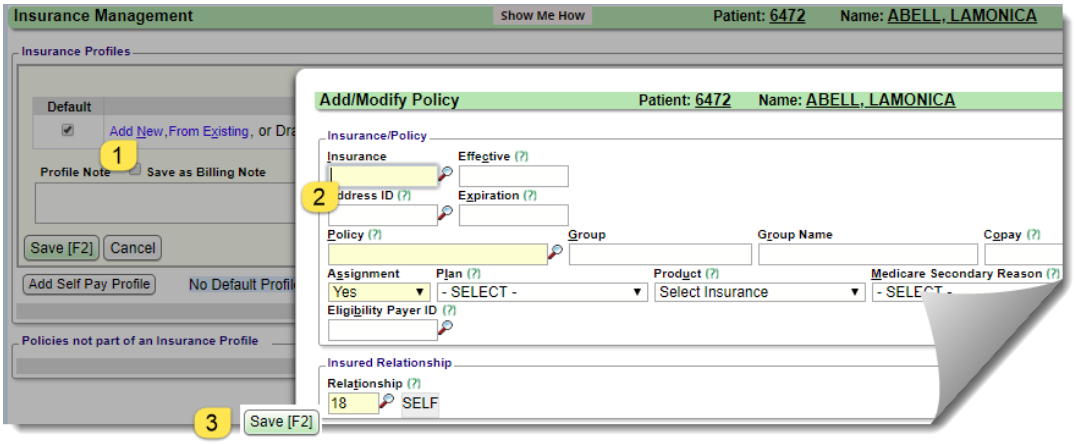
Click [Add New Insurance Profile]



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



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

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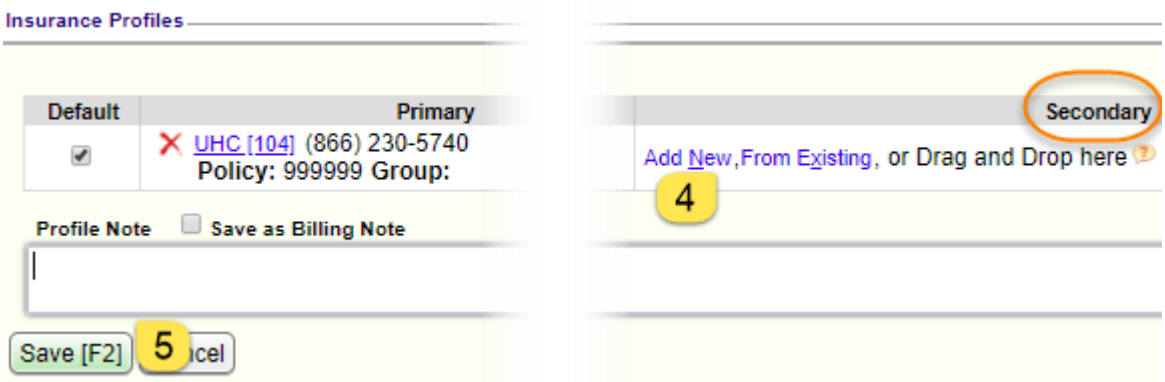
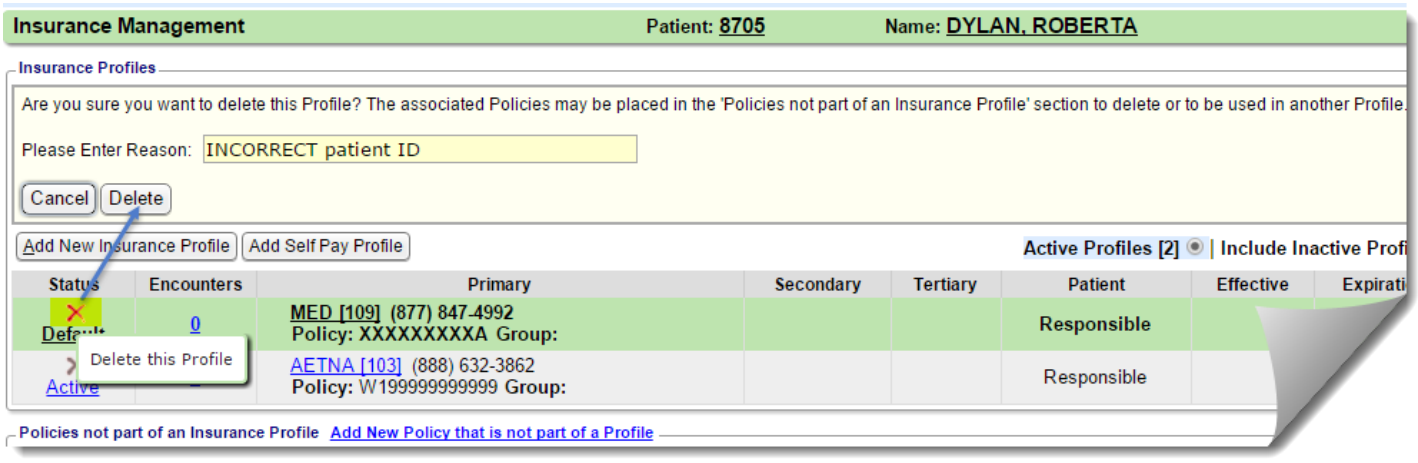
5. [Save] the profile



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.



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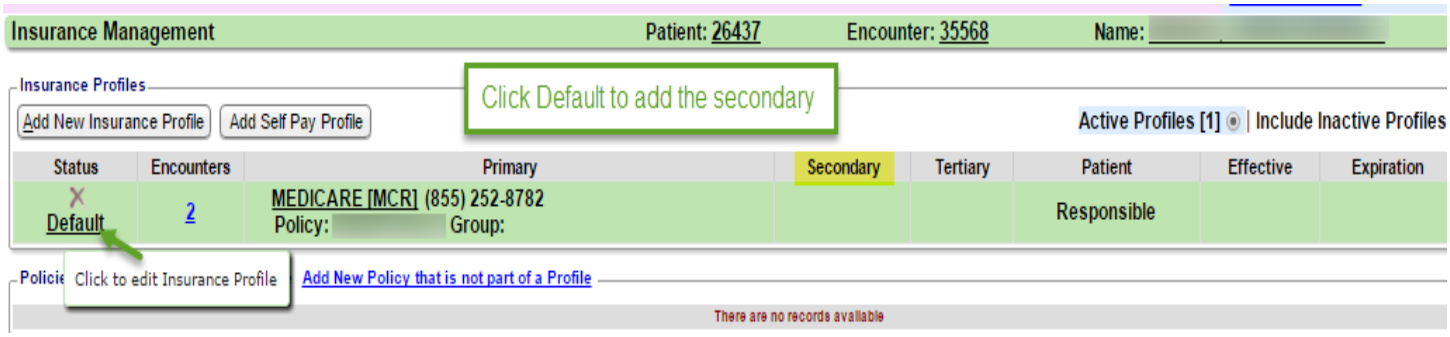
Once the *Profile* is deleted, the *Policies* that made up the profile drop into the 'Policies not part of an Insurance Profile' area. This gives the user the opportunity to reassign the policies into a different profile or delete them.

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



- Click 'Add New' or from Existing
- In the Popup to add/edit **Policy** information > [Save]

- You may also add Tertiary and Save the **Profile**.

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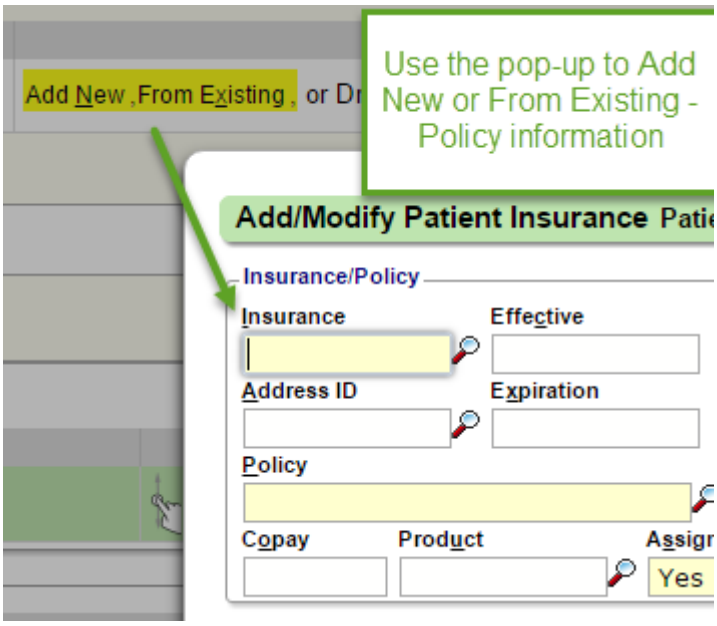
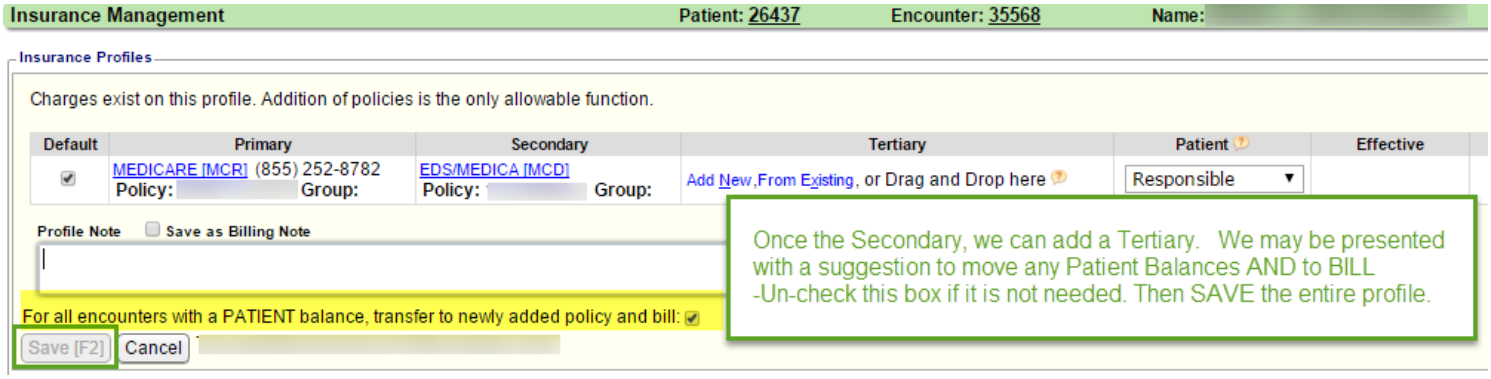


- If the changes affect encounters a checkbox appears. Pay special attention if you want to rebill at this time or not



- Save the new profile

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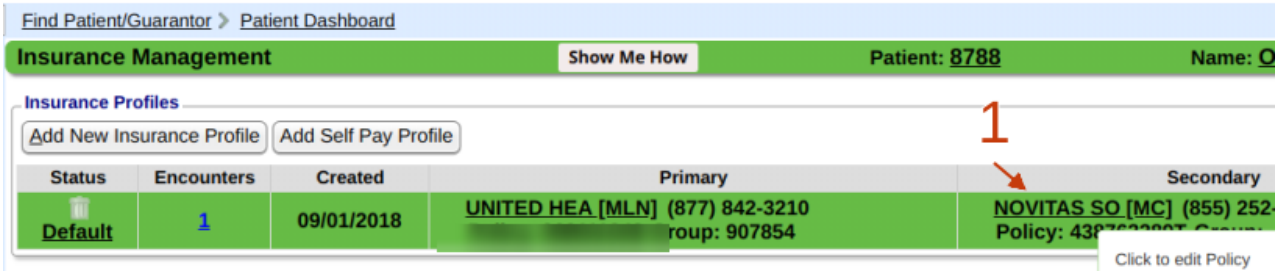
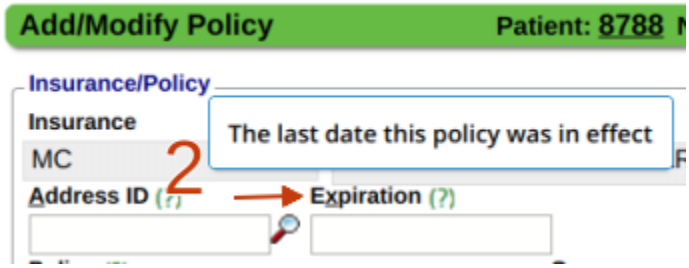
How do I expire a secondary?

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

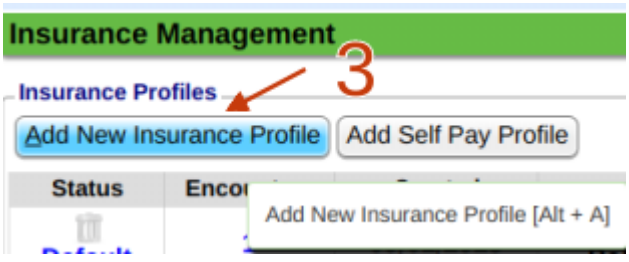
1. Expire the secondary
    - Click on the policy



2. Add expiration date



    - Save
3. Add a NEW Profile



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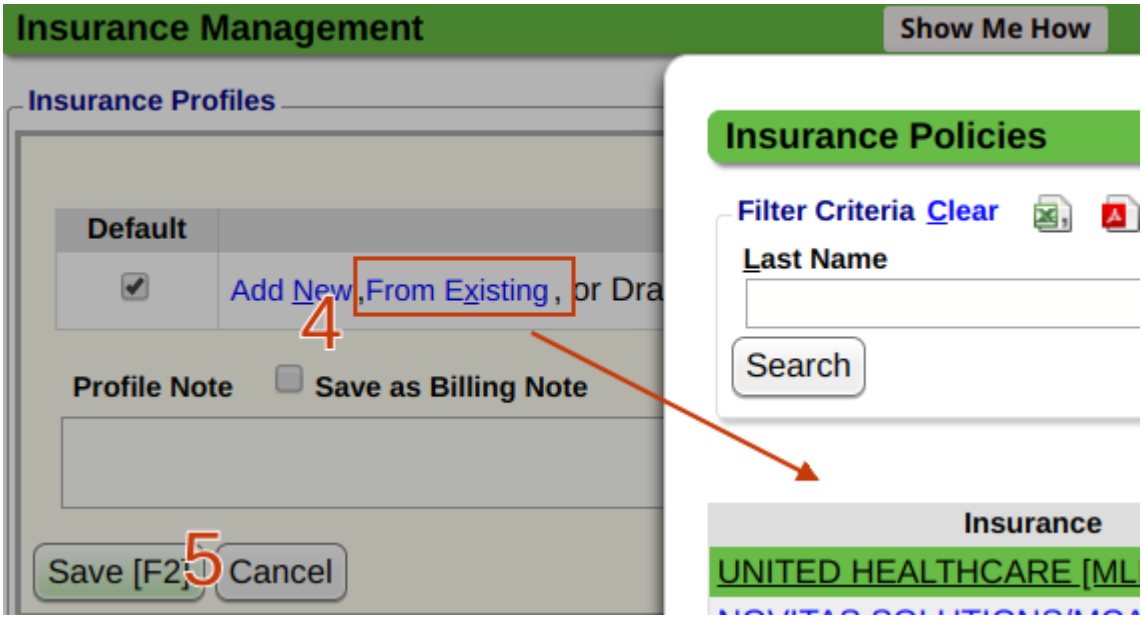
4. Choose from Existing for the Primary if it is still active



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

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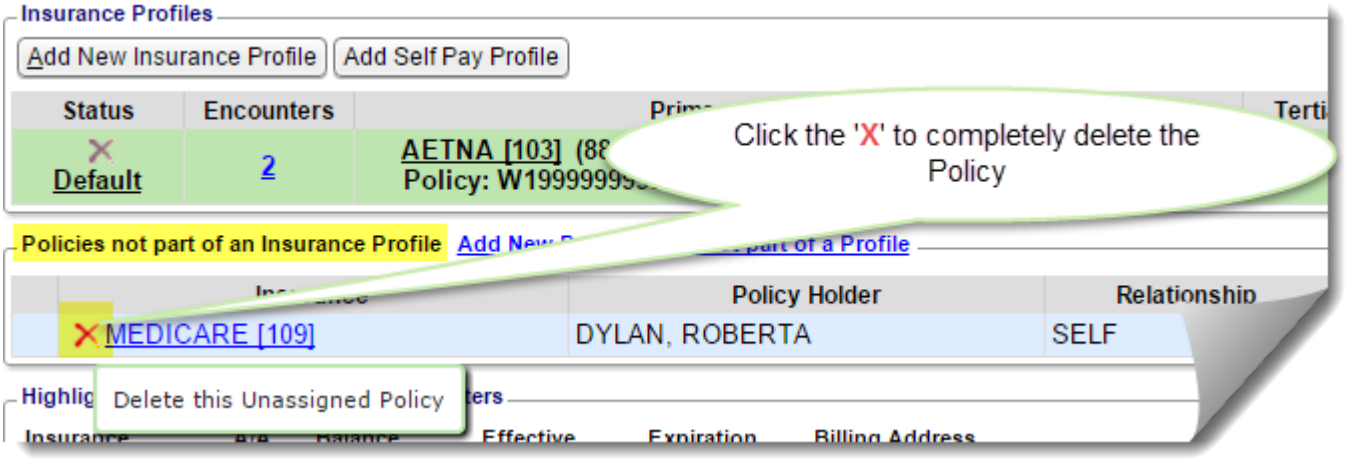
Policy

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.



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

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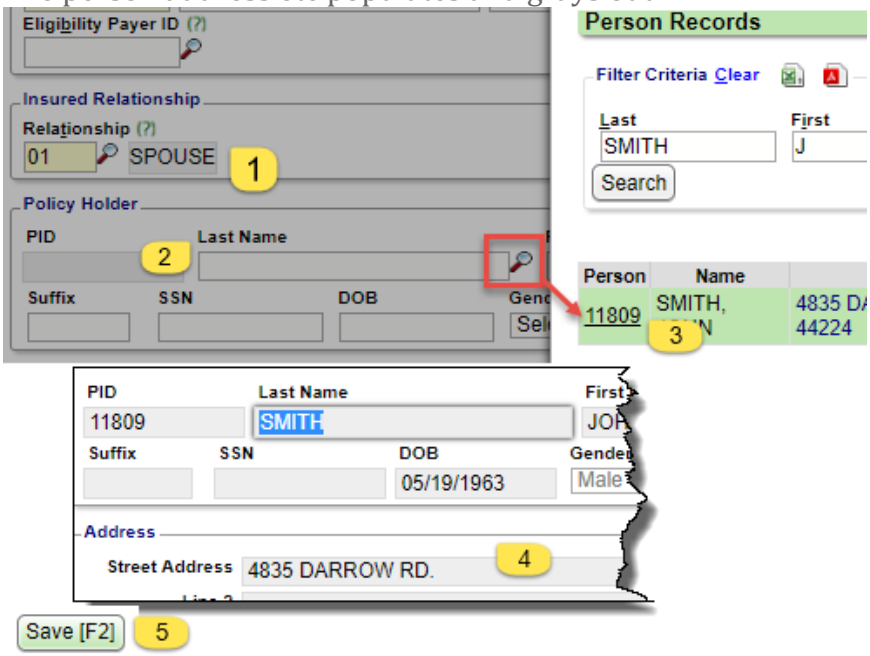
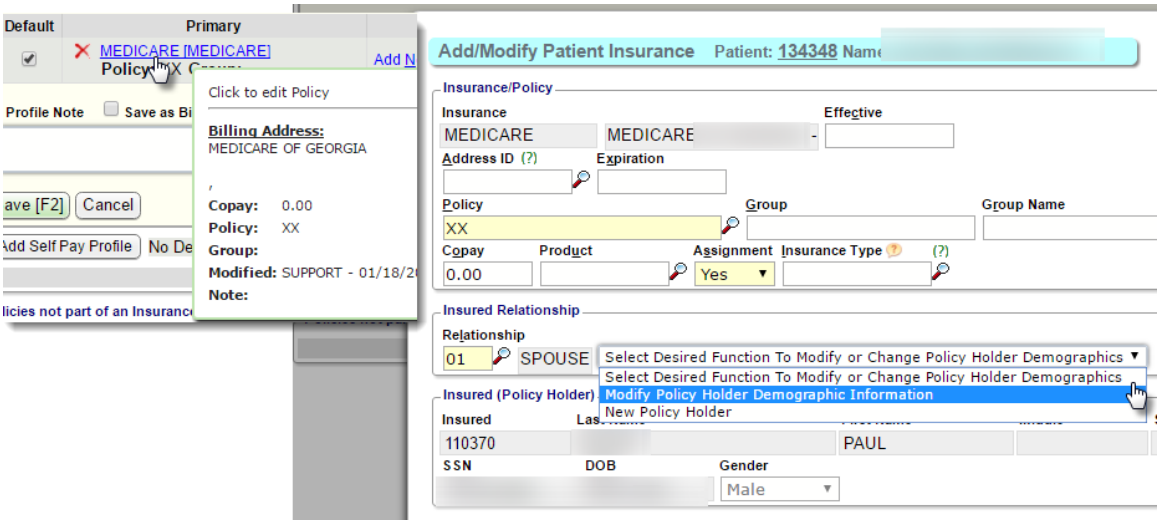
4. The person address etc populates and grays out



5. [SAVE]

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



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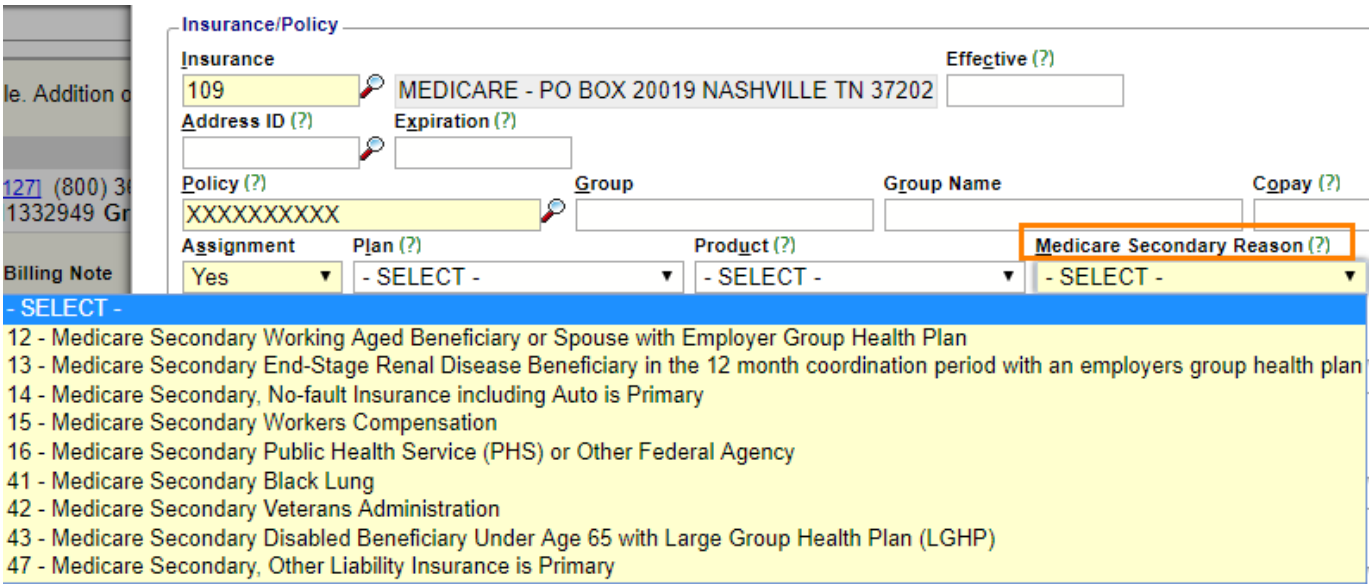
How do I indicate that Medicare is secondary?

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



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 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)
    - 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.

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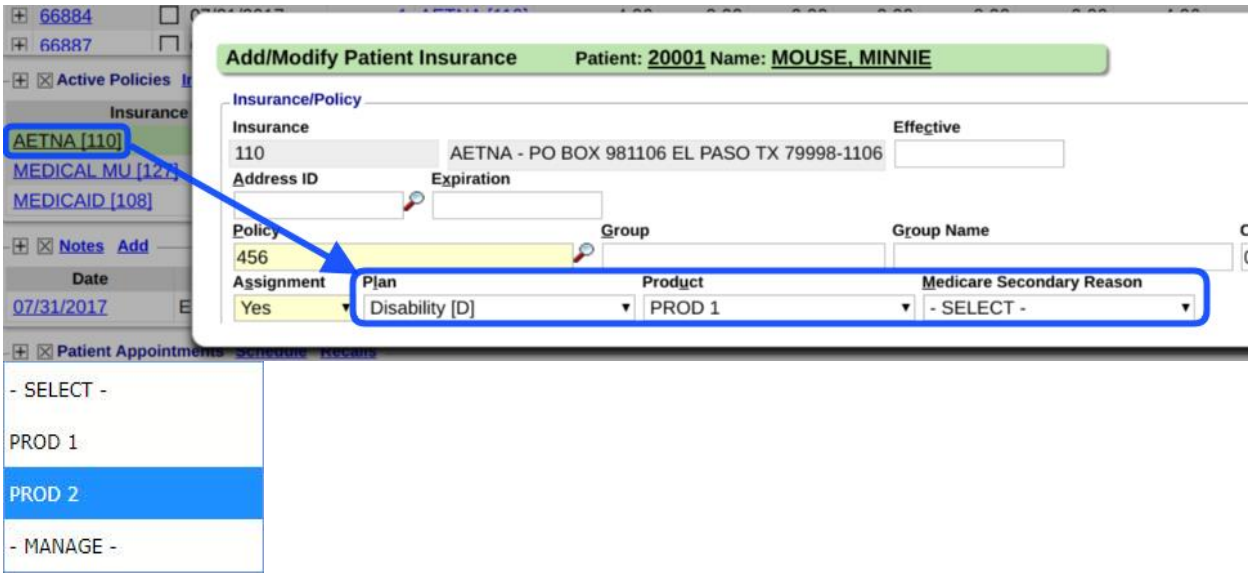

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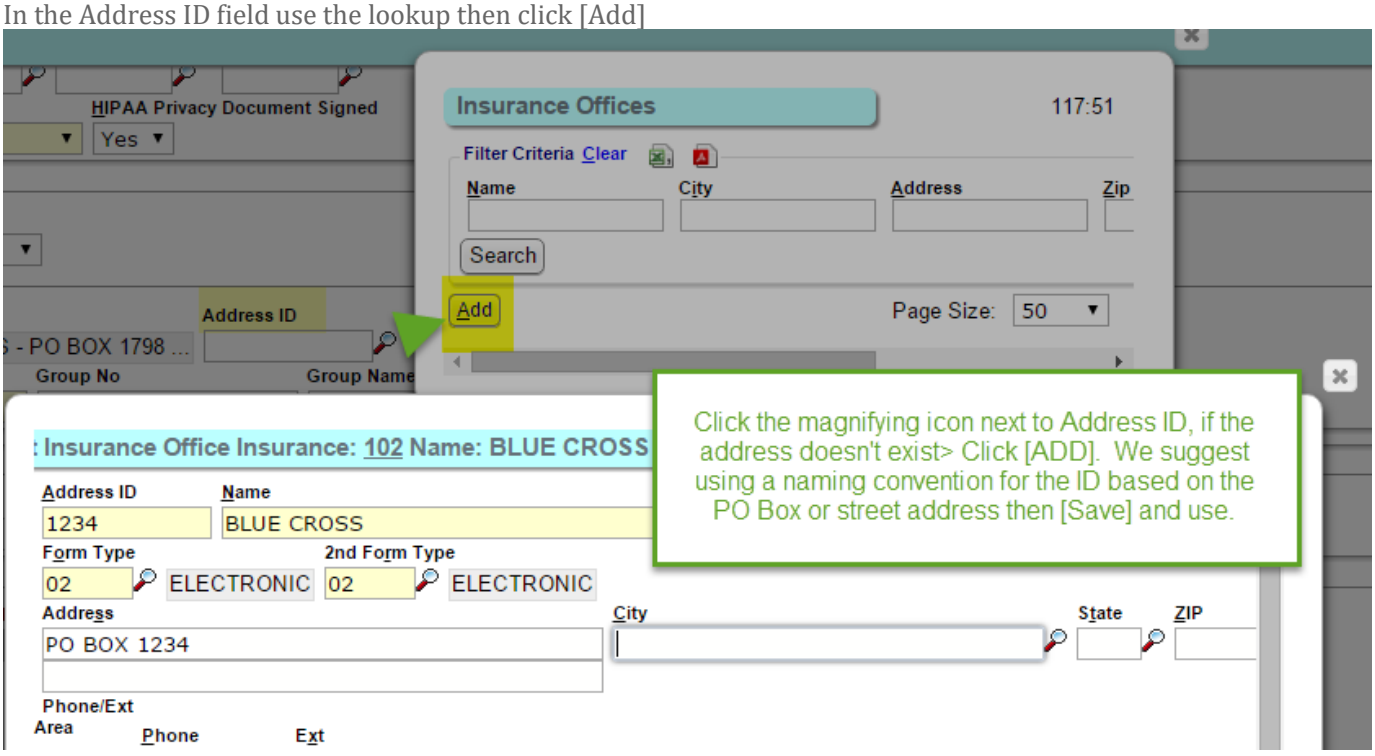
How do I add a street address to an existing Insurance?

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



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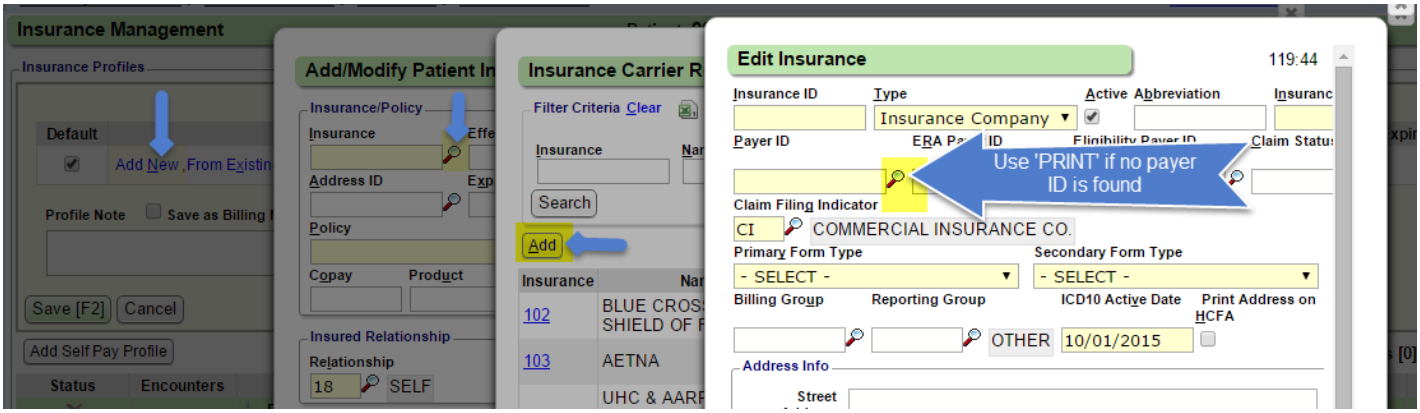
Insurance

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'

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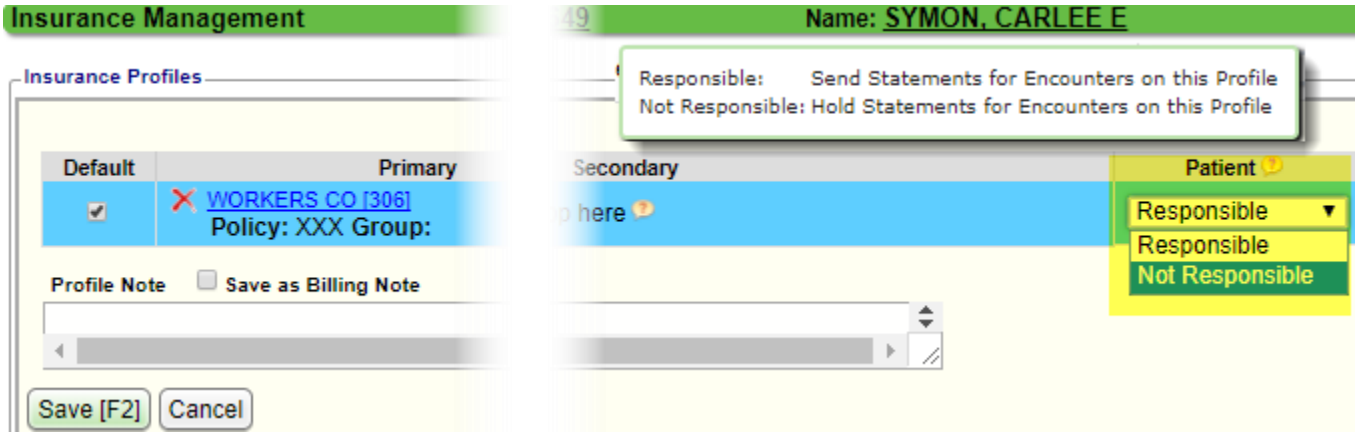
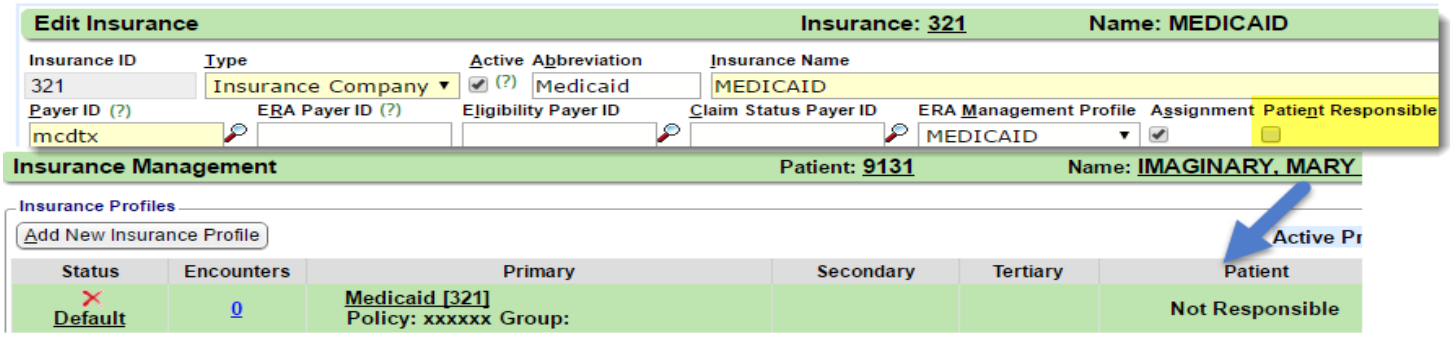


How do I make the Patient 'Not Responsible' for all profiles with this insurance?

'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'



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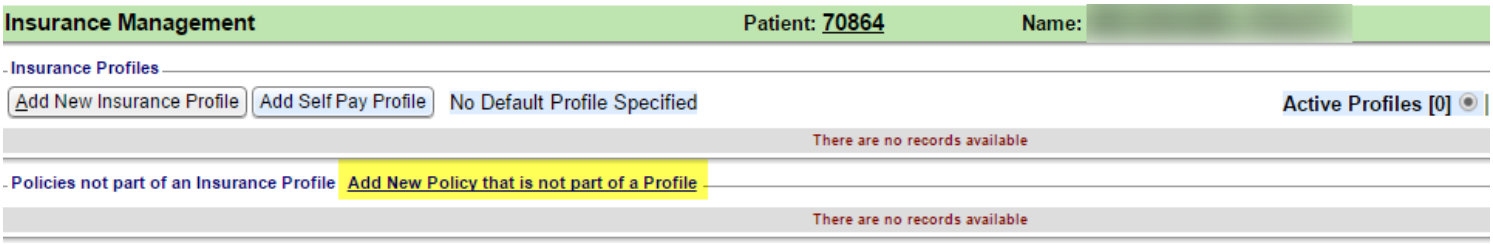
How should I use the section Add New Policy that is not part of a Profile?

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.



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

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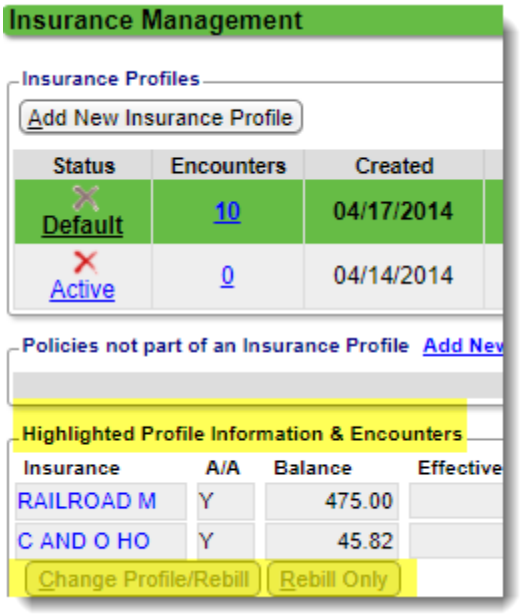
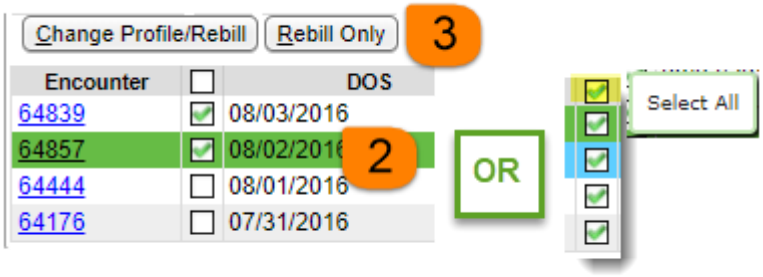


2. Choose the individual encounter(s) that should be rebilled **or** use the top checkbox to 'Select All'
3. Choose to either [Rebill only] or [Change Profile Rebill]



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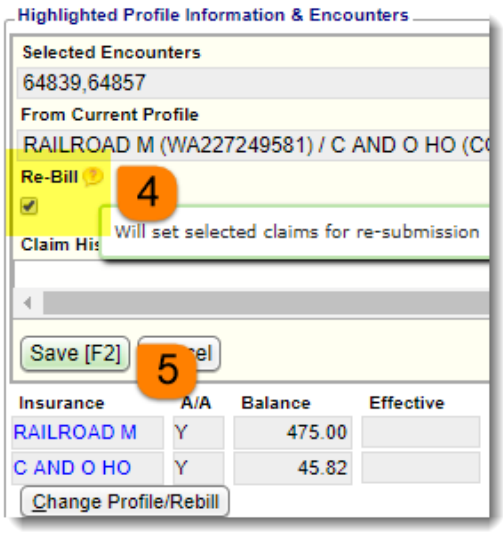
4. In the newly opened section, be sure the 'rebill' box is checked



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

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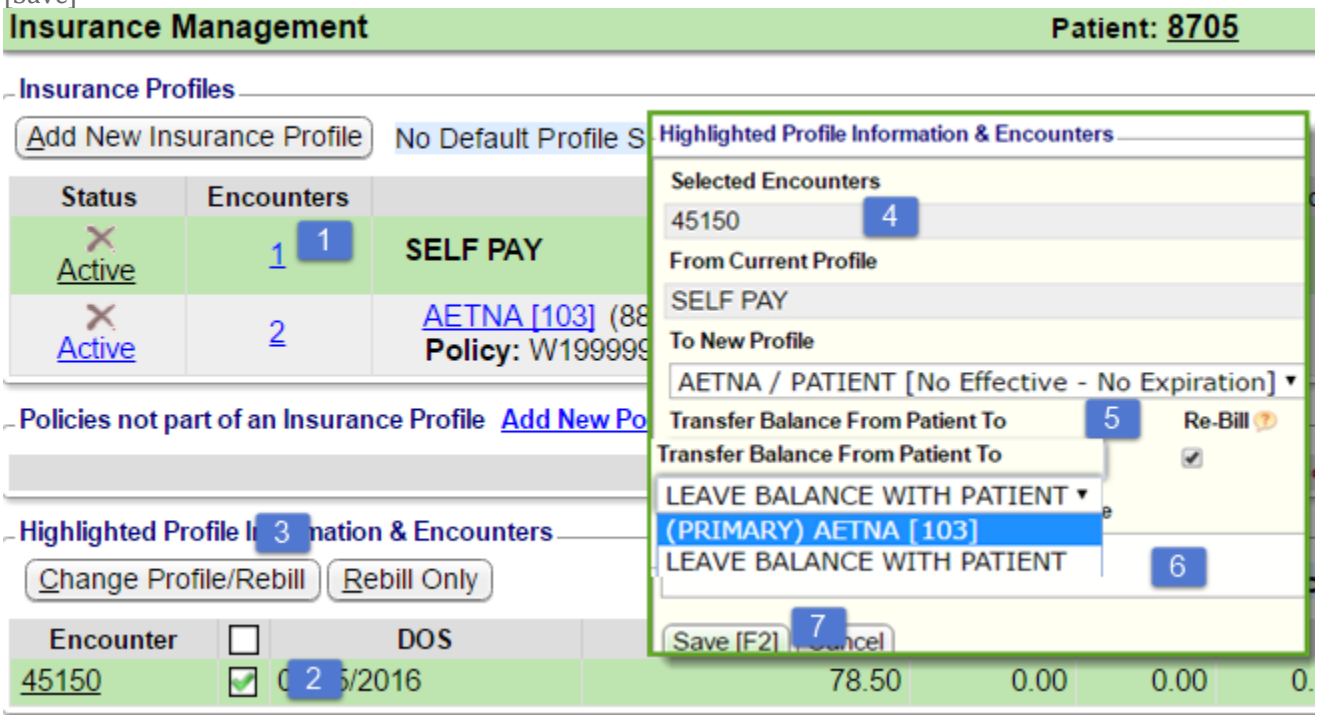
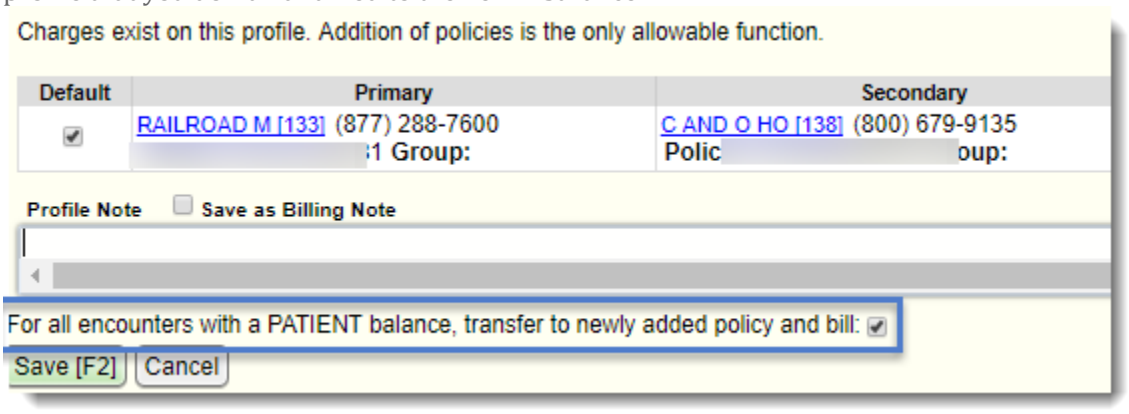
7. [Save]



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.



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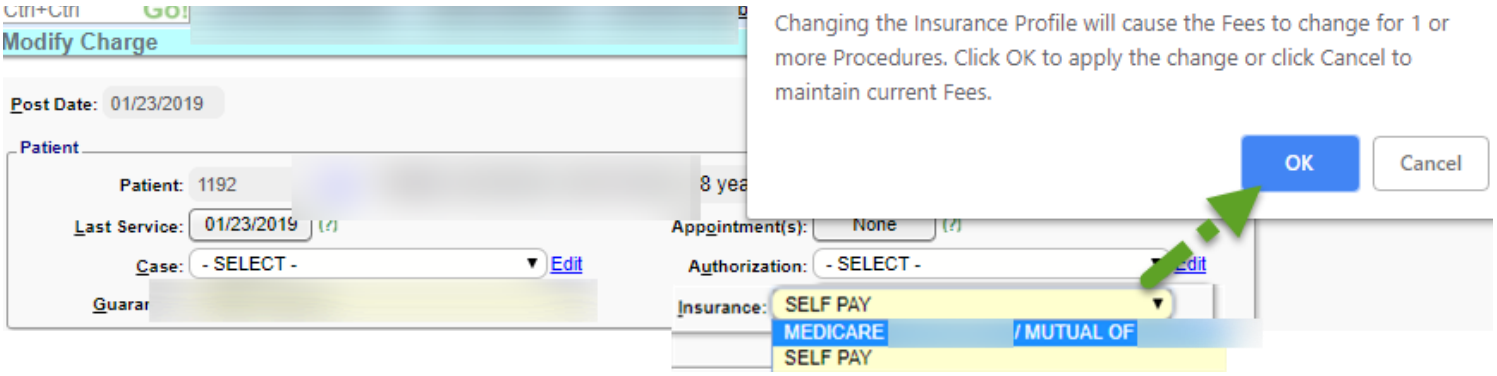
Can I change the charge fee on an encounter by changing the Insurance profile?

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



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