

THE "I" BUTTON- INSURANCE

The "I" button stores the Insurance information about the claim.

The screenshot shows a software interface for insurance information. At the top, a blue header bar contains the text "BLUE CROSS / BLUE SHIELD" and a row of buttons labeled "1", "2", "I", "H", "C", "M", "P", "A". Below the header, the form contains the following fields:

- Insured Person:** ERWIN E. BUFFALO (with a search icon)
- Relationship:** Self
- Contract:** XYZ987256314
- Group:** 87526
- Policy Type:** GROUP POLICY (with a dropdown arrow)
- Service Code:** (empty field)

At the bottom of the form is a large button labeled "Change Insurance".

The information on the "I" button is exactly what was on the Insurance & Dates screen at the time the transaction was entered or transferred. If it is found that Information has been mis-entered on the Insurance & Dates screen, correct it there, as well as here on the "I" button. You will have to do this for any transactions that were entered for the patient while the wrong insurance information existed.

The top of the screen, in blue, displays the type of insurance company which the patient is enrolled. For example, a Cigna patient would show "Commercial" up at the top instead of "Blue Cross / Blue Shield".

The "Change Insurance" button will change the payor for the transaction.

This screenshot is identical to the one above, showing the insurance information form with the "Change Insurance" button.

Clicking the "Change Insurance" button will enable this box:

The screenshot shows a dialog box titled "Clinic Pro". It contains a question mark icon and the text "Which carrier do you want to use for this procedure?". Below the text are three buttons: "Primary", "No Insurance", and "Cancel".

Select which insurance company you need from the dialogue box. When "Primary" is chosen, Clinic Pro will look to the primary insurance currently active on the patient, and copy that information into the claim. This means invalid contract numbers can be corrected as long as it's been corrected on the Insurance & Dates screen.

If the patient does not have a secondary insurance the Secondary insurance button will not display.

Choosing "No Insurance" will remove the charge from insurance billing by defaulting it to patient responsibility.

A very common usage of "Change Insurance" is if the patient's insurance number is incorrect, or they are now insured by a different company. To fix, first correct the information in the Insurance & Dates screen, and then come into this screen and choose Change Insurance > Primary.

If there are multiple procedures entered in for the same date of service, Clinic Pro will ask if a change in insurance is necessary on all of them or just on this one transaction.

If you need to transfer claims to secondary insurance, this is not the correct way to accomplish this task. That information can be found under "Insurance Payments".