

Setting up Coordination of Benefits billing (Linking Primary and Secondary Insurances)

1. Pull up your Patient Record and click on Payment Info (Bottom Left Button)
2. Enter your patient's insurance information.
 - a. Enter the Primary Insurance first then enter the Secondary Insurance (Primary Insurance should be the listed first on the Payment Profile)

The screenshot shows a 'Patient Record' window for 'DUMMY, PATIENT'. It contains a table with the following data:

Price Plan/Policy Number	Bin #/Group #	PCN/Effective Dates
PLAN G 123456	845 TEST	9999 00/00/0000-00/00/0000
TEST PLAN 1234567	123456 TEST1	990899 00/00/0000-00/00/0000

Buttons on the right side of the table include: Move To Top, Move Up, Move Down, and Move To End.

3. On the Secondary Insurance profile populate the information as shown:

The screenshot shows the 'Insurance Record: PATIENT DUMMY' window. The form contains the following fields and values:

- Information for: PATIENT DUMMY
- Payment Plan: TEST PLAN
- Effective Date: / /
- Expiration Date: / /
- Help Desk #:
- Policy ID Number: 1234567
- Person Code: 01
- Group Number: TEST1
- Birth Date: / /
- Card Holder Name: [Empty]
- Relationship: 1 - Cardholder
- Employer: [Empty]
- Insurance Company: [Empty]
- Carrier E-mail: [Empty]
- Copay Table: [Empty]
- Plan ID: [Empty]
- Other ID: 845 (PRIMARY BIN#)
- Other ID Qualifier: 99 - Other
- Clinic ID: [Empty]
- Second Other ID: [Empty]
- Other ID Qualifier: Not Specified
- Eligibility Code: [Empty]
- Home Plan: [Empty]
- Location: Transmit Blank (clear field)
- Accept Assignment:
- Other Coverage: 2 - Other Coverage Exists - Payment Collecte
- Med Limit Amount: .00
- Med Remaining Amount: .00
- Total Rx's: 0
- Benefit Amount: .00
- Family Benefit Amount: .00
- Family Total Rx's: 0
- Claim YTD Amount: .00
- Family YTD Amount: .00
- Number Deductibles Met: 0