

Insurance Policy Page (policy)



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PRINTING INSTRUCTIONS: To print out copies of this document, browse to *Insurance Policy Page (policy)* (<http://learn.pcc.com/policy.pdf>) to download a PDF formatted version. Then select the "File" menu and choose the "Print" option. If you have trouble opening and printing the PDF, please contact PCC support at <support@pcc.com> or (800) 722-1082.

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1. Introduction

Your office keeps track of insurance policy information for every patient that walks through your door. Managing those insurance policies is one of the most important functions of Partner. The Insurance Policies screen, available from several different Partner programs, is your one-stop screen for reviewing and changing a patient's insurance information.

2. Review Insurance Policies

Many Partner programs have direct links to the Insurance Policies screen. For example, if you are at the first **checkin** screen in Partner, press **[F1 -- Check Inscos]** or **Page Down** to review insurance policies for the patient. The Charge Posting (**chuck**) program and the Patient Editor (**notjane**) also have links to the **policy** screen.

To quickly open the **policy** screen, simply run the Patient Editor (**notjane**), find a patient, and then press **[F2 -- Edit Policies]**.

Policies are listed briefly at the top of the screen, and the details for the selected policy are shown at the bottom:

All Policies

Copay	Insurance Company	Certificate #	Group #
10.00	BCBS \$10	23232	23
15.00	AETNA \$15 PO BOX 1125	008559499	4ABC
25.00	(Expired) TUFTS \$25	0832505386	BROOKS45

Details for the Selected Policy

Press the Right Arrow key for full insurance plan notes.

BCBS \$10 / BCBS / BCBS
P.O. BOX 9196
N.QUINCY, MA 02171

Payor ID: BS059
Phone:

SUBSCRIBER
First: Fred
Last: Flinstone
Address:

Birth: Start: 01/01/2004
Sex: Male End:
Reln: Child

Employr:

Back to Patient Scroll Backward Scroll Forward Edit Policy Insert Policy Move Policy Delete Policy Expire Policy

Press the up and down arrow keys to select any policy. Once you have selected a policy, full details will appear in the box at the bottom of the screen. If the list of policies is too long to fit on the screen, press **[F3 -- Scroll Forward]** or **[F2 -- Scroll Backward]** to review the entire list. Press the right arrow key to view additional plan notes for the selected policy.

When Reading the List of Policies, Remember:

- If any subscriber details are blank, such as the name or address, Partner will generate claims using the information from the guarantor account. If the policy holder's address is the same as the guarantor's address, you do not need to re-enter the address on the patient's policy screen.

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- Unless it is expired, the first policy on the list is the patient’s primary insurance. Policies are auto-sorted: expired policies are automatically moved below active policies, and Medicaid policies appear below active non-medicaid policies. You can arrange your active policies to set the primary and secondary insurances by selecting a plan and pressing [F6 -- Move Policy].

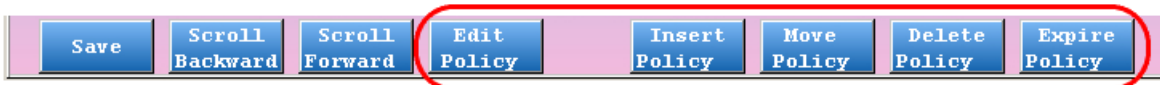
Caution

You should never *delete* an old, expired policy. There may still be outstanding balances due that company, or you may later need to know previous plan information for a patient. Instead, insert a new policy at the top of the list and expire the old policy.

3. Make Changes

You can edit, add, move, delete, or expire an insurance policy with a few, quick keystrokes. While inserting a new policy, you also have the options to copy a recently edited policy or automatically add the new plan to the record of any siblings or family members. When expiring a policy, you will have the opportunity to expire the same plan for all patients in the same family.

The function keys for each task are self-explanatory:



Select a policy on the screen using the arrow keys, press the appropriate function key, and follow the prompts on the screen. The more detailed instructions in the sections below will guide you through each task.

3.1. Add a Policy

When a patient’s insurance information changes, you need to add a new plan to their list of policies. You should do this *before* posting charges for the patient. Otherwise, the procedures may be billed to the wrong carrier or with the wrong information.

Follow this procedure to add a policy:

1. Press [F1 -- Insert Policy]



Insurance Policies			
Copay	Insurance Company	Certificate #	Group #
X	Adding New Policy Here		
20.00	BCBS \$20 Empire	232323333	23
10.00	Aetna PPO \$10	00855949993500	4ABC
\$ 0.00			
First:		Birth:	Start:
Last:		Sex: Female	End:
Employer:			
Subscriber Info:		Override Subscriber Info:	
Reln:		Reln:	
Addr:	479 Cocoa Avenue	Addr:	
City:	Plymouth	City:	
State:	VT	State:	
Zip Code:	05056	Zip code:	
Insert Last Modified Policy (patient Pebbles Flinstone)			
10.00	Aetna PPO \$10	00855949993500	4ABC
Save		Use Last Modified	

A new line will appear at the top of the list of insurance policies, and blank fields will appear at the bottom of the screen.

2. Enter Policy Information

Enter policy information in the blank fields.

Insurance Policies			
Copay	Insurance Company	Certificate #	Group #
\$ 15.00	Cigna PPO \$15	012345678	BROOKS45
First:	Wilma	Birth:	02/12/76
Last:	Flintstone	Sex:	Female
Employer:			
Subscriber Info:		Override Subscriber Info:	
Reln:		Reln:	
Addr:	479 Cocoa Avenue	Addr:	
City:	Plymouth	City:	
State:	VT	State:	
Zip Code:	05056	Zip code:	

Keep In Mind:

- **Looking Up the Insurance Company:** For the Insurance Company field, you can use an asterisk (*) to search through your practice's list of plans. For example, entering *BCBS* would show you a list of BCBS insurance plans. Depending on how your office tracks insurance companies, typing *4624* may show you all insurances with a P.O. Box of 4624, a handy shortcut.
- **Override Fields:** When generating claims, Partner will use the guarantor's name, address, and relationship as recorded in the **fame** and **notjane** programs. If the insurance policy holder is not the guarantor, you should fill out the name, relationship, and address fields shown above.

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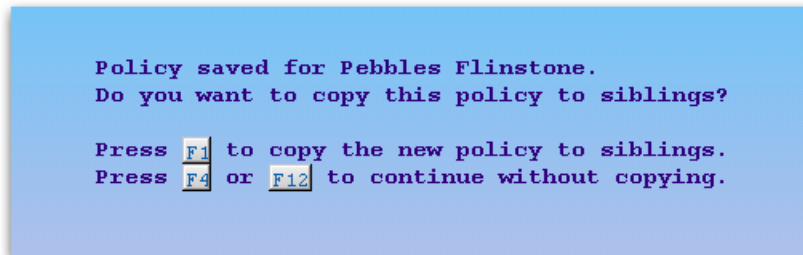
- **Effective Dates:** The effective dates are very important. Partner chooses which insurance company to bill based on the effective dates. You *can* leave the date fields blank, but Partner will then assume that the insurance plan has always been valid and that the coverage has no known expiration.

3. Press [F1 -- Save]

As soon as you press **F1**, the new policy will be saved and active for this patient.

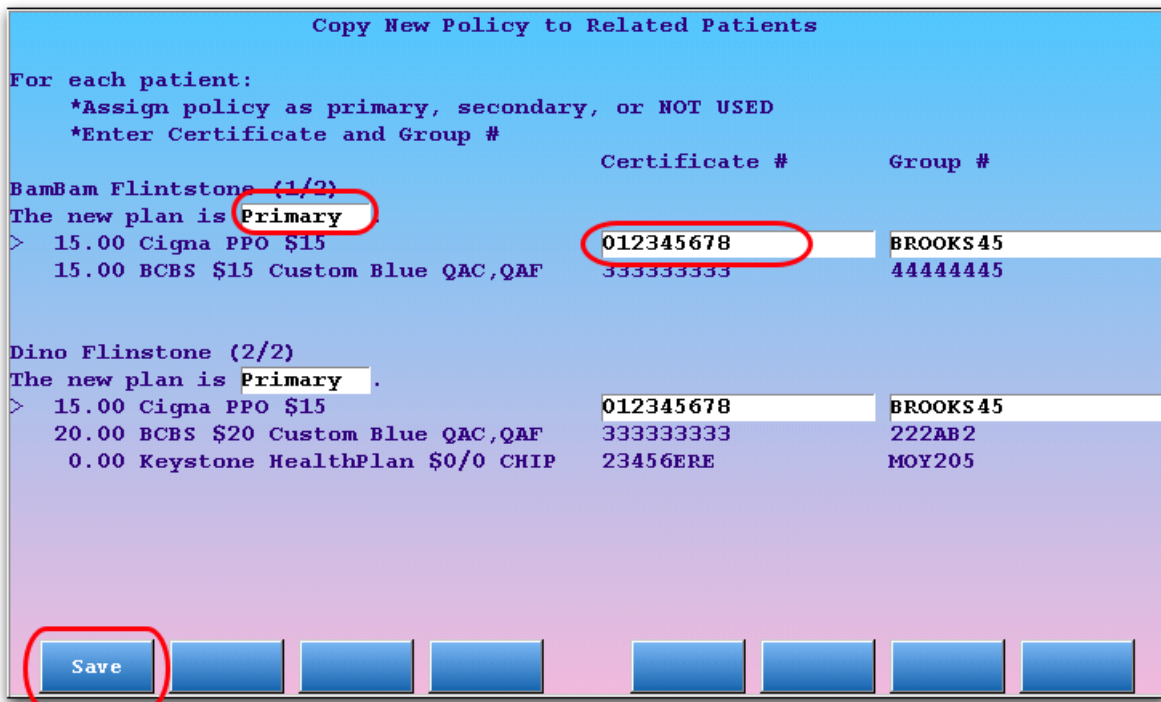
4. Optional: Copy the New Policy to Related Patients

If the new policy is not a Medicaid policy, and the patient has relatives in your system that share the same guarantor, Partner will next ask whether you wish to add the new policy to the patient's siblings. A sibling is any patient who shares a guarantor with the current patient.



Press [F1 -- Copy Policy] to continue to the sibling screen, press [F4 -- Do Not Copy] or F12 to continue without modifying siblings.

On the sibling selection screen, confirm the position (primary, secondary, etc.) of the new plan and update any differences to the certificate and group numbers for each patient.



Press [F1 -- Save] to add the plans to the sibling records.

If you do *not* wish to copy the new policy to any of these patients, press **F12**.

5. Review Your Changes

Finally, you will be returned to the main **policy** screen. After adding a new policy, you should review all active insurance policies for the patient. Is the primary insurance listed first? Do you need to expire an old policy? Use the function keys at the bottom of the screen to make any further changes to the patient policy record.

3.2. Copy a Policy

When adding a new policy, you may wish to copy insurance plan information from a recently edited policy elsewhere on the account. If you recently added or edited a policy for some other patient on the family, you can automatically import the entire plan to this patient's policy record.

Follow this procedure to copy the family's most recently edited policy:

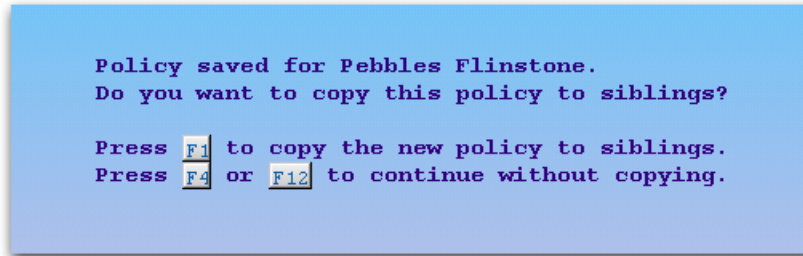
1. Press [**F1** -- *Insert Policy*]



Insurance Policies			
Copay	Insurance Company	Certificate #	Group #
X	Adding New Policy Here		
20.00	BCBS \$20 Empire	232323333	23
10.00	Aetna PPO \$10	00855949993500	4ABC
\$ 0.00			
First:		Birth:	Start:
Last:		Sex: Female	End:
		Employer:	
Subscriber Info:		Override Subscriber Info:	
Reln:		Reln:	
Addr: 479 Cocoa Avenue		Addr:	
City: Plymouth		City:	
State: VT Zip Code: 05056		State:	Zip code:
F5) Insert Last Modified Policy (patient Pebbles Flinstone)			
10.00	Aetna PPO \$10	00855949993500	4ABC
Save		Use Last Modified	

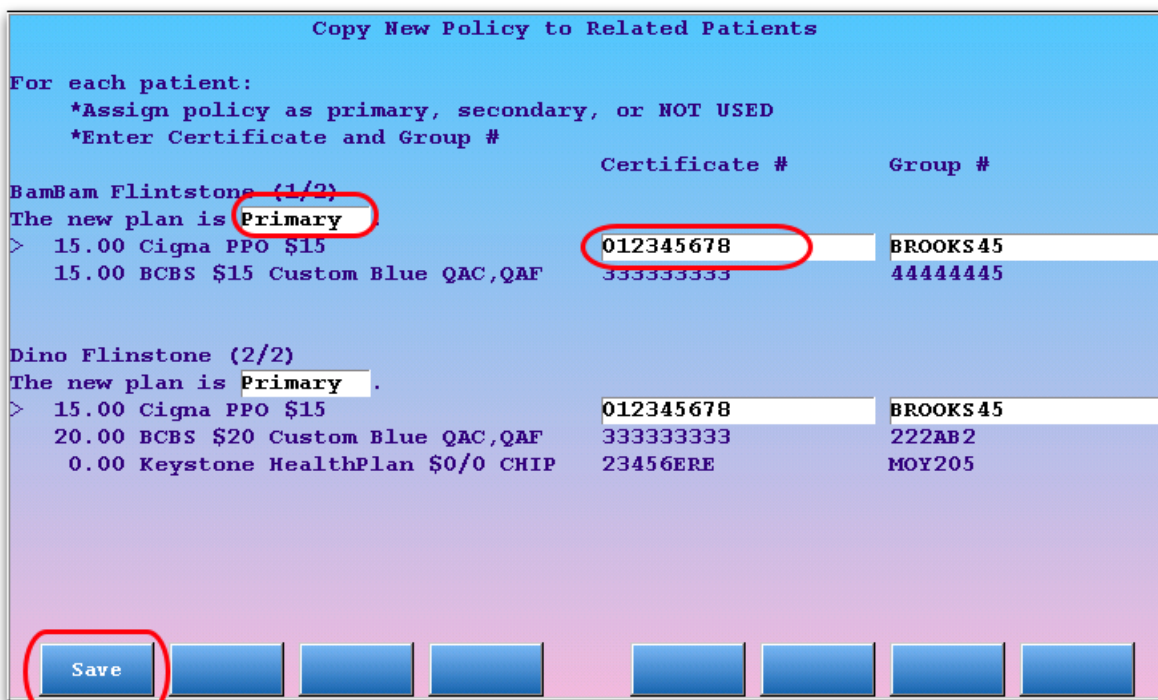
A new line will appear at the top of the list of insurance policies, and blank fields will appear at the bottom of the screen.

2. Press [**F5** -- *Use Last Modified*]



Press **[F1 -- Copy Policy]** to continue to the sibling screen, press **[F4 -- Do Not Copy]** or **F12** to continue without modifying siblings.

On the sibling selection screen, confirm the position (primary, secondary, etc.) of the new plan and update any differences to the certificate and group numbers for each patient.



Press **[F1 -- Save]** to add the plans to the sibling records.

If you *do not* wish to copy the new policy to any of these patients, press **F12**.

6. Review Your Changes

Finally, you will be returned to the main **policy** screen. After adding a new policy, you should review all active insurance policies for the patient. Is the primary insurance listed first? Do you need to expire an old policy? Use the function keys at the bottom of the screen to make any further changes to the patient policy record.

3.3. Expire a Policy

When you add a new insurance policy to a patient, you will usually expire an old policy. When you expire an

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insurance policy, you will also be given the option to expire the same policy for all patients with the same guarantor.

When you wish to expire a policy, follow this procedure:

1. Select the Policy You Want to Expire and Press [F6 -- Expire Policy]

Insurance Policies Pebbles Flintstone		
Copay Insurance Company	Certificate #	Group #
10.00 BCBS \$10	23232	23
<input checked="" type="checkbox"/> 15.00 AETNA \$15 PO BOX 1125	008559499	4ABC
25.00 TUFTS \$25	083250538609	BROOKS45
25.00 (Expired) TUFTS \$25	0832505386	BROOKS45



2. Enter the End Date

Yesterday's date will be entered automatically in the "End Date" field for the policy. You can enter a different date, indicating when the policy expires. The end date is the last date on which the selected policy should be billed for new charges.

Copay Insurance Company	Certificate #	Group #
\$ 15.00 Cigna PPO \$15	444444444	BROOKS45
First: Wilma	Birth: 02/12/76	Start: 01/01/07
Last: Flintstone	Sex: Female	End: 04/08/07
Employer:		

3. Press [F1 -- Save]

Press F1 to save the policy's end date and expire the policy.

4. Optional: Expire Policy for Patient Siblings

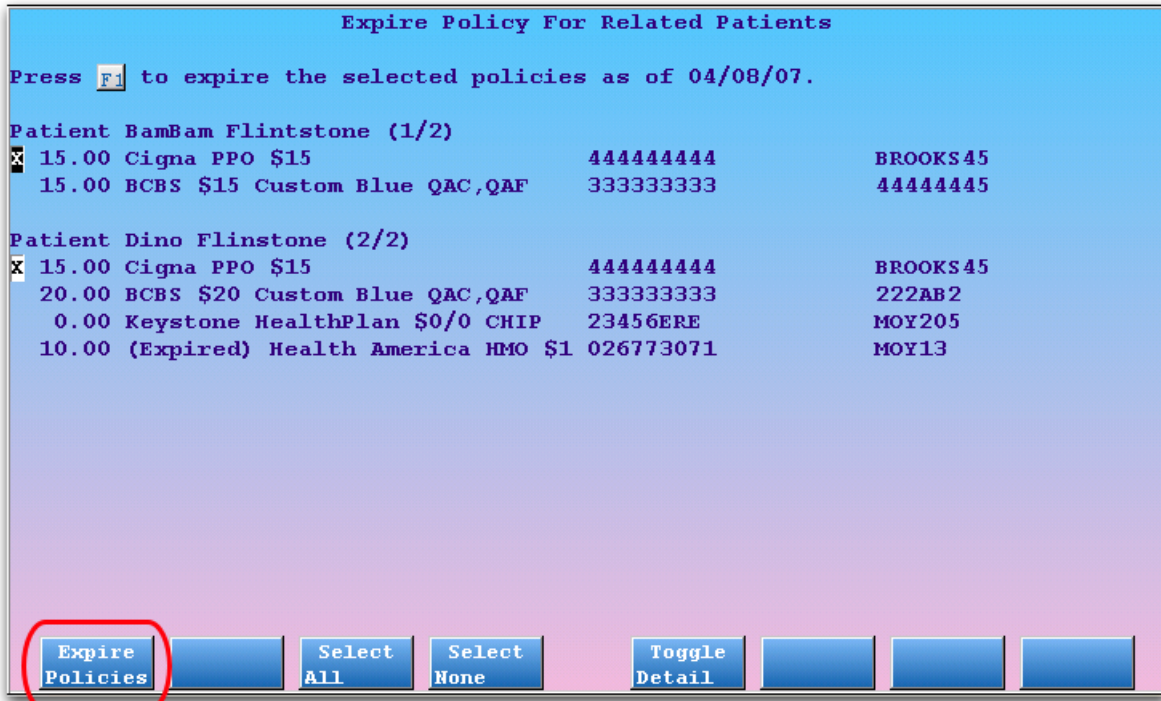
Next, Partner will ask if you wish to expire the same policy for the patient's siblings. A sibling is any patient who shares a guarantor with the current patient.

Policy expired for Pebbles Flinstone.
Do you want to expire the same policy for siblings?

Press F1 to expire the new policy for siblings.
Press F4/F12 to leave sibling policies unchanged.

Press [F1 -- *Expire Policy*] to continue to the sibling screen, press [F4 -- *Do Not Expire*] or F12 to continue without modifying siblings.

On the Expire Policy for Related Patients screen, review the policies for each of the siblings and press [F1 -- *Expire Policies*] to continue. You can change which policies will be expired by deselecting them or using the selection function keys at the bottom of the screen. Press F12 to cancel and leave the siblings' policies untouched.



Toggle Detail: If you need more information about the listed policies, press [F5 -- *Toggle Detail*].

You can only expire policies that match the one you just expired. You will not be able to select and expire a sibling's policy unless it uses the same entry in the Insurance Companies table in the Table Editor (**ted**).

5. Press [F1 -- *Expire Policies*] to Expire Selected Policies

Review Your Work: The procedure above will expire a policy for one patient and any related patients you select. Remember, however, that you should always review and update each patient's policy information every time they visit your office.

3.4. Edit an Existing Policy

You may discover a bad certificate number, or learn that a policy is in a different parent's name and not that of the guarantor account. Follow this procedure to change information about an insurance policy that is already on an account:

1. First, use the arrow keys to select the insurance policy you need to edit.

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- Next, press [F4 -- Edit Policy] to make changes. The screen will change to allow editing, and your cursor will move to the "Insurance Company" name field.

Copay	Insurance Company	Certificate #	Group #
\$ 15.00	Cigna PPO \$15	012345678	BROOKS45
First: Wilma		Birth: 02/12/76	Start: 01/01/07
Last: Flintstone		Sex: Female	End:
Subscriber Info:		Override Subscriber Info:	
Reln:		Reln:	
Addr: 479 Cocoa Avenue		Addr:	
City: Plymouth		City:	
State: VT	Zip Code: 05056	State:	Zip code:

- Use the **Tab**, **Enter** or arrow keys to move to the field that needs to be changed.
- When you are finished, press [F1 -- Save] to save your changes. If you make a mistake or choose not to save your changes, press **F12**.

Important: You should never overwrite an existing policy with a new plan, even if only the address or the copay has changed. There may be outstanding charges pending the old policy or you may need to reference the family's insurance history. Instead, use [F5 -- Insert Policy]. You can then press [F4 -- Copy a Policy] to grab the information from the policy you wish to correct. When you finish adding the new plan, use [F8 -- Expire Policy] to expire the changed policy.

3.5. Make a Policy Primary or Secondary

When you post charges, Partner pends them to the active insurance policy on the patient's account. But what if the account has more than one active policy? Which policy is the account's primary insurance? Partner will send the charges to the first policy listed on this screen. Therefore, you may need to adjust the order of the account's active policies. Follow the procedure below.

- Select the policy you wish to move. Use the up and down arrow keys to move to the policy.
- Press [F6 -- Move Policy]. You will see the screen shown below:

Acct PCC: 180		The Family Editor		Page 2 of 4	
Account Fred Flinstone					
Copay	Insurance Company	Certificate #	Group #		
10.00	BCBS/BOX 9196 \$10	23232	23		
X 0.00	Aetna USHC/BOX 26106	008559499	PCC1151		
10.00	(Expired) Tufts Assoc Health P	083250386	BR0458		

Moving Policy

Use the up and down arrow keys to move the policy.

Press **F1** to accept new policy position.

- Use the arrow keys to move the policy where you want it. The screen will update as you move it, showing you the result of the move.
- When you are finished, press **[F1 -- Save]** to save your changes. If you make a mistake or choose not to save your changes, press **F12**.

3.6. Delete a Policy

Under rare circumstances, you may need to delete a policy from an account. If any charges have been posted while a policy is active, you should not delete that policy. If you have added the wrong plan to the wrong account, however, or the account never should have had a certain policy, you can do the following to remove it:

- Use the up and down arrow keys to select the offending policy.
- Press **[F7 -- Delete Policy]**. You will see a warning screen.
- Press **[F8 -- Delete]** if you are certain you want to delete the selected policy. If you change your mind and wish to keep the selected policy, press **F12**. Once deleted, there is no way to "undelete" a policy.

4. Policy Logs (*policylog*)

The Policy Log (**policylog**) program displays a log of all changes made to a patient's insurance policy record.

When an insurance policy is added, edited, deleted, or moved, Partner records that action, the time and date it was performed, and the user who made the change. If an insurance policy was accidentally deleted or changed, you can

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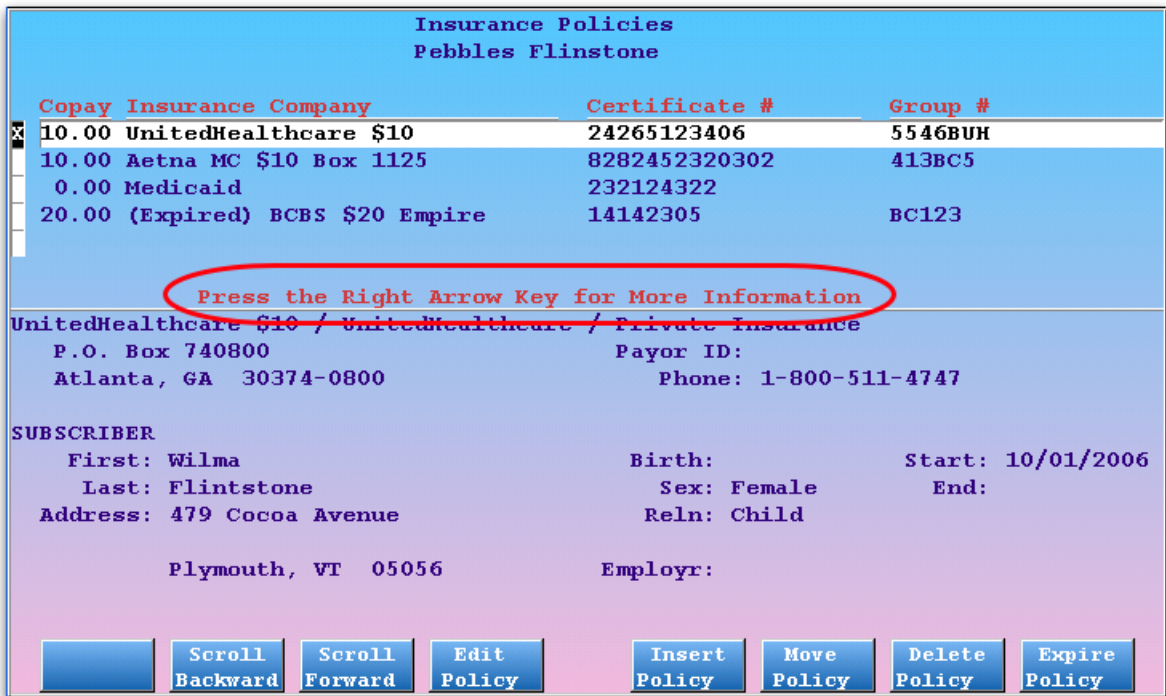
run **policylog** to review the patient’s past insurance records. You can also review exactly when a policy was added to a patient’s record, which may help explain a billing problem.

How Far Back? PCC created the **policylog** program in the spring of 2007. If you need help researching policy changes made before your Partner 3.2007 update, contact PCC support.

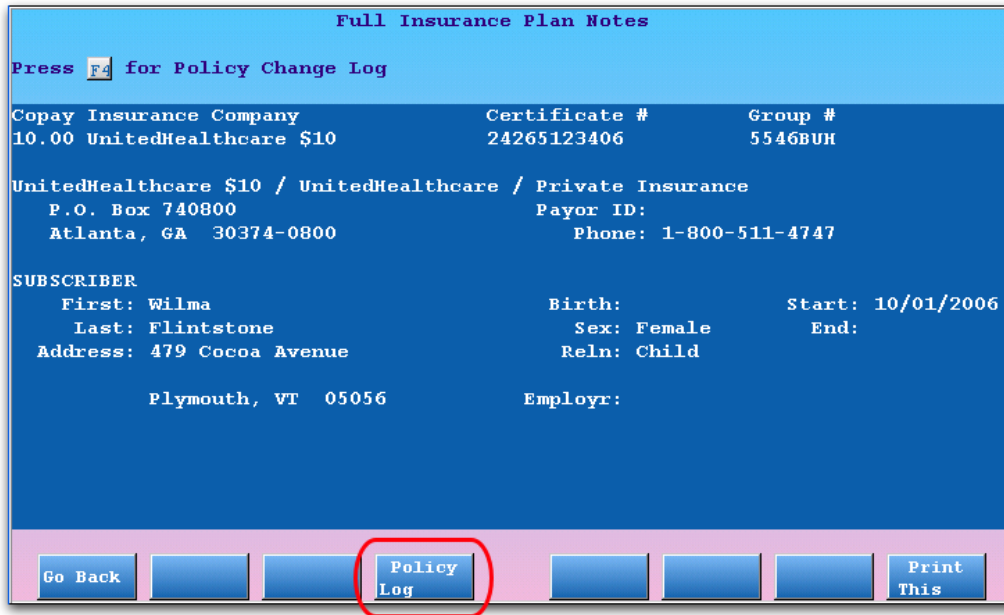
4.1. Running Policy Log

There are two ways to run **policylog**:

- You can run **policylog** while viewing a patient’s policies. First, press the right arrow key:



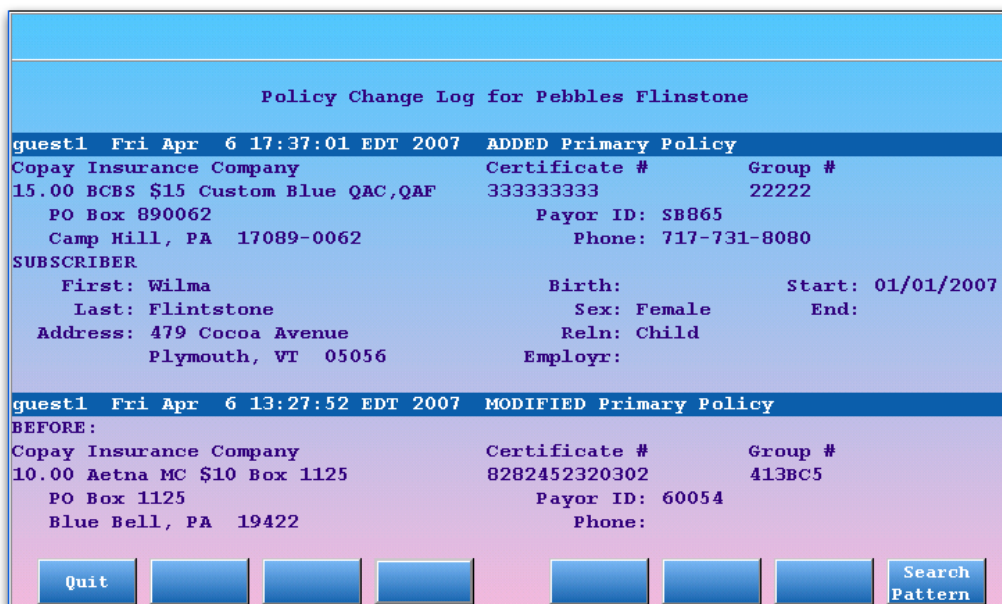
Next, press [F4 -- Policy Log].



- You can also run **policylog** as a stand-alone program, either from a command prompt or from a custom entry in your Partner Windows. Contact PCC Software Support for more information.

4.2. Reading Policy Log

The policy log is a list of entries that describe changes made to a patient's policy record. The entries are displayed in reverse-chronological order, with the most recent changes listed at the top.



You can press **Page Down** and **Page Up** to scroll through the entries page-by-page, or press the down and up arrow keys to scroll through the list one line at a time.

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Each entry in the log describes one action. For each action, **policylog** displays a header with the user who made the change, the date and time the change occurred, and a description of the change.

```
Partner Username      Date and Time      Action Performed
-----
guest1  Fri Apr  6 17:37:01 EDT 2007  ADDED Primary Policy
```

The header shown above indicates that the user "guest1" added a new primary policy on Friday, April 6th, at 5:37pm. The body of each entry shows the details of the policy affected by the change.

```
guest1  Fri Apr  6 17:37:01 EDT 2007  ADDED Primary Policy
Copay Insurance Company      Certificate #      Group #
15.00 BCBS $15 Custom Blue QAC,QAF  333333333      22222
PO Box 890062                Payor ID: SB865
Camp Hill, PA 17089-0062     Phone: 717-731-8080
SUBSCRIBER
First: Wilma                  Birth:              Start: 01/01/2007
Last: Flintstone             Sex: Female         End:
Address: 479 Cocoa Avenue     ReIn: Child
Plymouth, VT 05056           Employr:
```

The primary policy that guest1 added was a BCBS policy with a \$15 copay.

More Complex Changes: When a plan is moved or modified in some way, the body of the entry will include a "Before and After" section to show the change that was made:

```
quest1  Fri Apr  6 17:49:10 EDT 2007  MODIFIED Primary Policy
BEFORE:
Copay Insurance Company      Certificate #      Group #
15.00 BCBS $15 Custom Blue QAC,QAF  333333333      22222
PO Box 890062                Payor ID: SB865
Camp Hill, PA 17089-0062     Phone: 717-731-8080
SUBSCRIBER
First: Wilma                  Birth:              Start: 01/01/2007
Last: Flintstone             Sex: Female         End:
Address: 479 Cocoa Avenue     ReIn: Child
Plymouth, VT 05056           Employr:

AFTER:
Copay Insurance Company      Certificate #      Group #
15.00 BCBS $15 Custom Blue QAC,QAF  444444444      22222
PO Box 890062                Payor ID: SB865
Camp Hill, PA 17089-0062     Phone: 717-731-8080
SUBSCRIBER
First: Wilma                  Birth:              Start: 03/01/2007
Last: Flintstone             Sex: Female         End:
Address: 479 Cocoa Avenue     ReIn: Child
Plymouth, VT 05056           Employr:
```

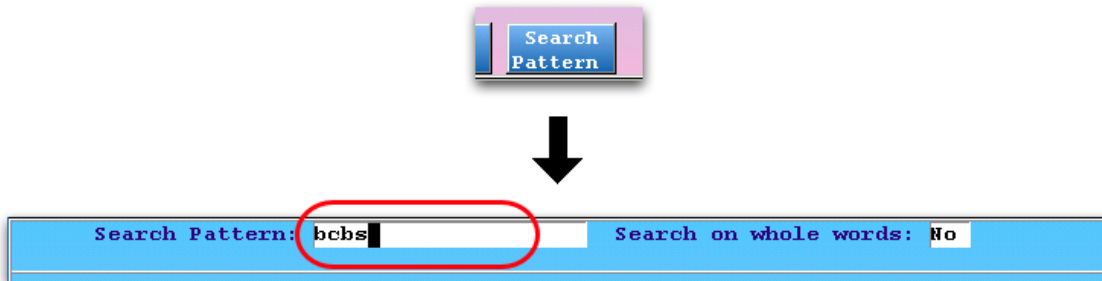
In the example above, guest1 changed the certificate number on the BCBS plan from 333333333 to 444444444. The policy's start date was also changed from 1/01/2007 to 3/01/2007.

Modified or Expired? Policy expiration is shown in **policylog** with a "MODIFIED" header. When you expire a

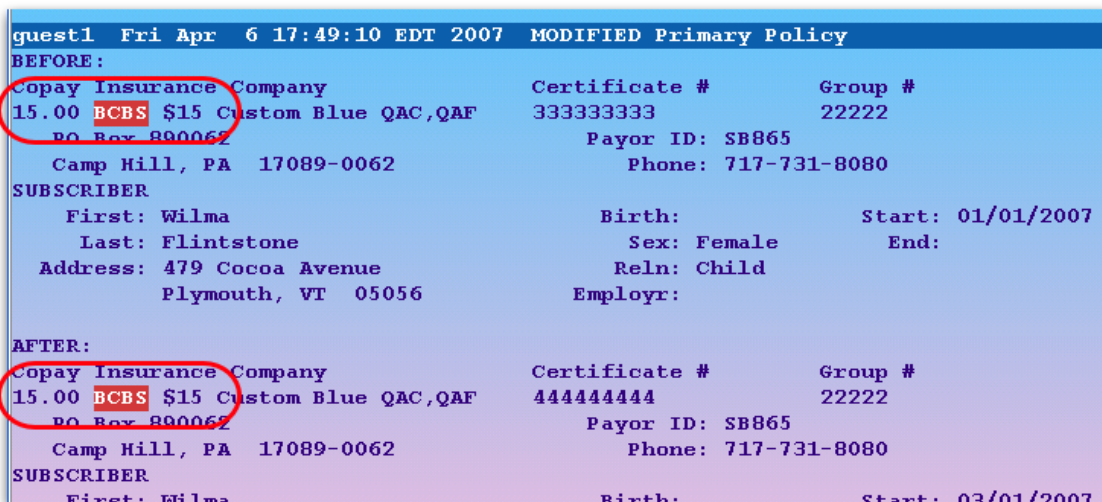
policy, **policylog** records that as a modification.

4.3. Searching for Policy Information

If a patient's insurance record has been changed several times, it can be difficult to find specific information. Press [**F8** -- *Search Pattern*] to perform a search.



After typing a search term, press **Enter**. The results of your search will be highlighted and the screen will automatically scroll to the first search result.



```

guest1 Fri Apr 6 17:49:10 EDT 2007 MODIFIED Primary Policy
BEFORE:
Copay Insurance Company          Certificate #      Group #
15.00 BCBS $15 Custom Blue QAC,QAF 333333333        22222
PO Box 890062                    Payor ID: SB865
Camp Hill, PA 17089-0062         Phone: 717-731-8080
SUBSCRIBER
  First: Wilma                    Birth:           Start: 01/01/2007
  Last: Flintstone                Sex: Female      End:
  Address: 479 Cocoa Avenue        Reln: Child
  Plymouth, VT 05056              Employer:
AFTER:
Copay Insurance Company          Certificate #      Group #
15.00 BCBS $15 Custom Blue QAC,QAF 444444444        22222
PO Box 890062                    Payor ID: SB865
Camp Hill, PA 17089-0062         Phone: 717-731-8080
SUBSCRIBER
  First: Wilma                    Birth:           Start: 03/01/2007

```

Press [**F7** -- *Search For Next*] to jump to the next result.

4.4. Conclusion

By researching a patient's **policylog** record, you can recover lost insurance information, discover insurance updating problems at your practice, and improve communication in your office. Contact PCC Support at (800)-722-1082 or <support@pcc.com> if you have any questions.

5. Conclusion

Good insurance tracking means fewer billing and collection problems. Partner's Insurance Policies screen will help you quickly and accurately track insurance information for each patient. If you have any questions, concerns or suggestions, please let us know at 1-800-722-1082.