



EHR Go Guide: Insurance in the EHR

Introduction

The Insurance tab of the patient chart is where the patient's insurance information is stored and kept up-to-date. It is important that the insurance information is entered accurately so that reimbursement for claims is not delayed. Gather the information from the patient's printed insurance card whenever possible and enter the data exactly as it appears on the card.

In EHR Go, the Insurance tab is located in the Accounts section.

Additional resources

Please refer to the *Student Guide to EHR Go* for information on logging in to Go and launching the EHR for an activity.

FAQs about insurance

1. **How do I tell if the patient has insurance?**
 - a. After selecting the Account section, select the Insurance tab. If the patient has insurance, it will be listed here. A 'Y' will also indicate if it is currently active.

2. **Can I upload a scanned copy of the patient's insurance card?**
 - a. Yes, a scanned copy of the card can be added by editing an existing insurance entry or by adding a new entry. See next sections for more information.

Accessing existing insurance data in the EHR

After launching the EHR for a patient chart, select the Account section and then the Insurance tab:



The screenshot shows the EHR patient overview page for Nathan Holderfield. The left sidebar contains a menu with items: Discovery, Health, Pharmacy, Account, Registration, Encounters, Insurance (circled in red), Scheduling, Claims, Ledger, and Reports. A red arrow points from the 'Insurance' menu item to the 'Overview' section of the main content area. The 'Overview' section includes three tables: Patient Info, Encounters, and Alerts.

NAME	CONTACT INFORMATION	PATIENT LANGUAGE	PATIENT RACE/ ETHNICITY
Holderfield, Nathan	608-555-1534 (Home) 608-555-4209 (Emergency Contact) 608-555-7421 (Mobile)		White or Caucasian

DATE	LOCATION	PROVIDER	STATUS	DESCRIPTION
07/05/2018 14:01	Central Clinic	Joseph Martinez, MD	Checked In In room	Discharge follow up

DATE & TIME	SUBJECT	STATUS	ALERT TYPE
07/05/2018 14:01	Chronic Coumadin Therapy	Active	Clinical Warning
07/05/2018 14:01	NKA	Active	Adverse Reaction/Allergy

The insurance list view shown below provides the Priority, Plan Name, Plan Number, Effective Date, Expiration Date, and Active indicator for each entry. If there is more than one insurance entry, they are sorted by default by Effective Date with the most recent note at the top. You can tell this because the 'Effective Date' heading appears in blue with a small arrow pointing down, indicating a descending order.



Patient: Nathan Holderfield DOB: 09/26/1942 72 yo M MR#: MR1120 Chronic Coumadin Therapy, NKA

Discovery

Health

Account

Registration

Insurance

Scheduling

Claims

Ledger

Reports

Management

Insurance

PRIORITY	PLAN NAME	PLAN NUMBER	EFFECTIVE DATE	EXPIRATION DATE	ACTIVE
Secondary	HOIPT	987654	04/01/2015	04/01/2016	Y
Primary	Medicare		04/20/2010	04/20/2030	Y

NEW

You can sort by any of the columns by clicking on the heading then the arrow that appears next to it.

Health

Account

Registration

Insurance

PRIORITY	PLAN NAME	PLAN NUMBER	EFFECTIVE DATE	EXPIRATION DATE	ACTIVE
Primary	Medicare		04/20/2010	04/20/2030	Y
Secondary	HOIPT	987654	04/01/2015	04/01/2016	Y

To view additional details, click anywhere on an insurance line entry:

A screenshot of the EHR system's "Insurance Details" page. The page header shows patient information: "Patient: Nathan Holderfield", "DOB: 09/26/1942 72 yo M", "MR#: MR1120", and "Admit Date: Chronic Coumadin Therapy, NKA". A search bar is in the top right. A left sidebar contains navigation options: Discovery, Health, Account, Registration, Insurance (selected), Scheduling, Claims, Ledger, Reports, and Management. The main content area is titled "Insurance Details" and contains two sections. The first section, "Insurance", is a table with the following data:

Insurance Priority: Secondary	Active: Yes	
Policy Holder: Self	Type of Coverage: Group Health Plan	Insurance Company: BlueCross BlueShield
Member ID: XY2543210		
Plan Type: PPO	Plan Name: HOIPT	Plan Number: 987654
Group Name:	Group Number: 023456	Effective Date: 04/01/2015
Expiration Date: 04/01/2016	Policy Details: \$15 copay for office visit	

The second section, "Insurance cards", is a table with the following structure:

Date	Author	Comment	Attachment
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At the bottom right of the page, there are four action buttons: EDIT, DELETE, CLOSE, and NEXT.

On the details view, you may select from the following menu options found in the bottom right corner of the screen. Note: If there's only one entry then some of these fields may not be shown/applicable.

Previous: Brings you to the details screen of the previous insurance listing if you're not already looking at the first note.

Delete: This option will appear only for insurance entries you have authored yourself, allowing you to completely delete the entry. Warning: Deleting the insurance entry completely removes it from the chart and it cannot be recovered.

Edit: Allows you to modify an existing insurance entry. See next section *Editing an existing insurance entry* for more information.

Close: Exits the details view of the specific insurance entry and returns to the summary list.



Next: Brings you to the next insurance entry in the list if you're not already looking at the last entry.

If an insurance card has been scanned, it will be listed under the Insurance Cards section. Click the link under the Attachment field to download a copy of the file.

A screenshot of the EHR system's 'Insurance Details' page for patient Nathan Holderfield. The page includes a sidebar with navigation options like Discovery, Health, Account, Registration, Insurance, Scheduling, Claims, Ledger, Reports, and Management. The main content area shows insurance information such as Priority, Policy Holder, Member ID, Plan Type, Group Name, and Expiration Date. Below this is a table for 'Insurance cards' with columns for Date, Author, Comment, and Attachment. The table contains one entry for a Medicare Insurance Card scanned on 07/05/2015. At the bottom right, there are buttons for PREVIOUS, EDIT, and CLOSE.

Insurance Details

Insurance

Insurance Priority: Primary	Active: Yes	
Policy Holder: Self	Type of Coverage: Medicare	Insurance Company: Medicare
Member ID: 304-56-9390-A		
Plan Type: Hospital/Medical	Plan Name: Medicare	Plan Number:
Group Name:	Group Number:	Effective Date: 04/20/2010
Expiration Date: 04/20/2030	Policy Details: Hospital Part A; Medical Part B	

Insurance cards

Date	Author	Comment	Attachment
07/05/2015 21:55	Emily Garcia, MA	Medicare Insurance Card	/activities/attachments/17

PREVIOUS EDIT CLOSE

Depending on your browser, you may have to click the downloaded file to open it and view the card.



Patient: Nathan Holderfield **DOB:** 09/26/1942 72 yo M **MR#:** MR1120 **Admit Date:** Chronic Coumadin Therapy, NKA

Insurance Details

Insurance

Insurance Priority: Primary	Active: Yes	
Policy Holder: Self	Type of Coverage: Medicare	Insurance Company: Medicare
Member ID: 304-56-9390-A		
Plan Type: Hospital/Medical	Plan Name: Medicare	Plan Number:
Group Name:	Group Number:	Effective Date: 04/20/2010
Expiration Date: 04/20/2030	Policy Details: Hospital Part A; Medical Part B	

Insurance cards

Date	Author	Comment	Attachment
07/05/2015 21:55	Emily Garcia, MA	Medicare Insurance Card	/activities/attachments/17

Holderfield ins...png Show all downloads...

Sample card image:



Editing an existing insurance entry

Follow the steps in the previous section to access the Insurance tab for a specific patient. Then click anywhere on the existing insurance line entry to access the details view for that insurance.



Patient: Nathan Holderfield DOB: 09/26/1942 72 yo M MR#: MR1120
Admit Date: Chronic Coumadin Therapy, NKA

Insurance

PRIORITY	PLAN NAME	PLAN NUMBER	EFFECTIVE DATE	EXPIRATION DATE	ACTIVE
Primary	Medicare		04/20/2010	04/20/2030	Y

NEW

From the Insurance Details, choose **Edit** to update the patient’s existing insurance information.

Patient: Nathan Holderfield DOB: 09/26/1942 72 yo M MR#: MR1120
Admit Date: Chronic Coumadin Therapy, NKA

Insurance Details

Insurance		
Insurance Priority: Primary	Active: Yes	
Policy Holder: Self	Type of Coverage: Medicare	Insurance Company: Medicare
Member ID: 304-56-9390-A		
Plan Type: Hospital/Medical	Plan Name: Medicare	Plan Number:
Group Name:	Group Number:	Effective Date: 04/20/2010
Expiration Date: 04/20/2030	Policy Details: Hospital Part A; Medical Part B	

Insurance cards			
Date	Author	Comment	Attachment

PREVIOUS EDIT CLOSE



Note: If a patient has changed insurance, do not edit. Instead, change the 'Active' field of the previous insurance account to "No". Then create a new entry for the new insurance provider following the steps in the next section. That way, a history of the previous insurance is maintained.

In Go, any of the existing insurance information may be edited. The next section describes the all of the fields in more detail.

A screenshot of the EHR Go "Insurance Edit" form. The patient information at the top includes: Patient: Nathan Holderfield, DOB: 09/26/1942, 72 yo M, MR#: MR1120, and Admit Date: Chronic Coumadin Therapy, NKA. The form fields are: Insurance Priority (Primary), Active (Yes), Policy Holder (Self), Type of Coverage (Medicare), Insurance Company (empty), Member ID (304-56-9390-A), Plan Type (Hospital/Medical), Plan Name (Medicare), Plan Number (empty), Group Name (empty), Group Number (empty), Effective Date (04/20/2010), Expiration Date (04/20/2030), and Policy Details (Hospital Part A, Medical Part B). There are "SAVE" and "CANCEL" buttons at the bottom right.

Select **Cancel** if you do not want your changes applied to the insurance entry. Otherwise, select **Save** after completing the edits.

The patient's insurance has now been updated to reflect the changes you implemented. When you are finished in the patient chart, select **Close Session**. **Important!** This is how your work is saved. Do not close your browser window or tab without clicking Close Session.

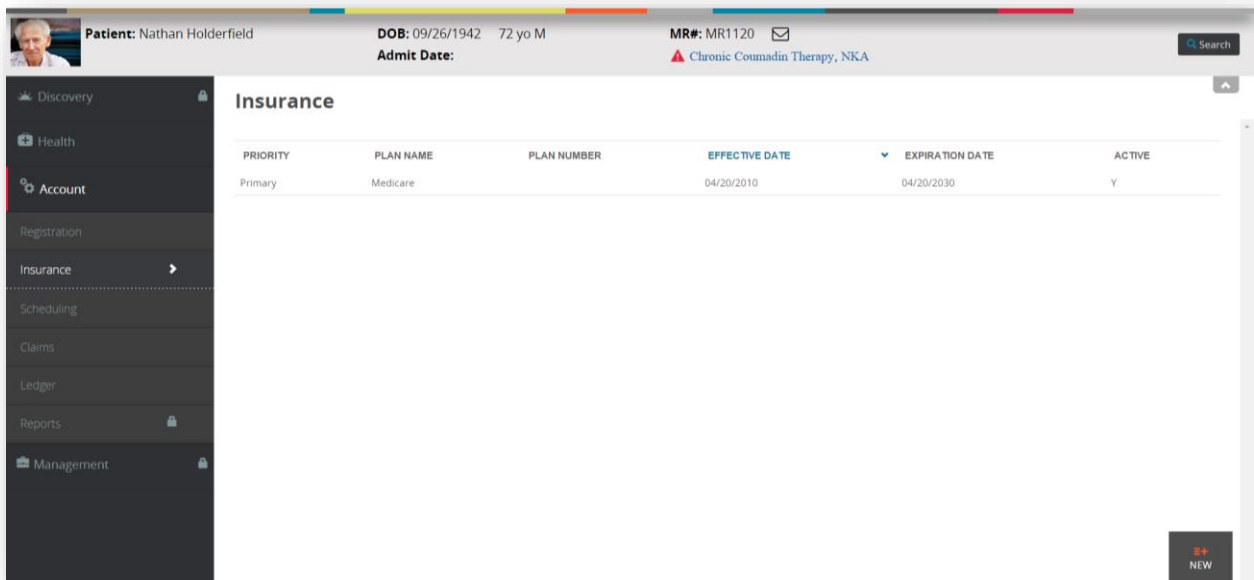


Note that only you can see the changes and they do not impact other users in the EHR. These edits are tracked in the EHR session and the corresponding Progress Report and can be submitted to your instructor for review. The Progress Report is found under Download Work for the specific EHR session (see *EHR Go Guide to Completing and Submitting Work*).

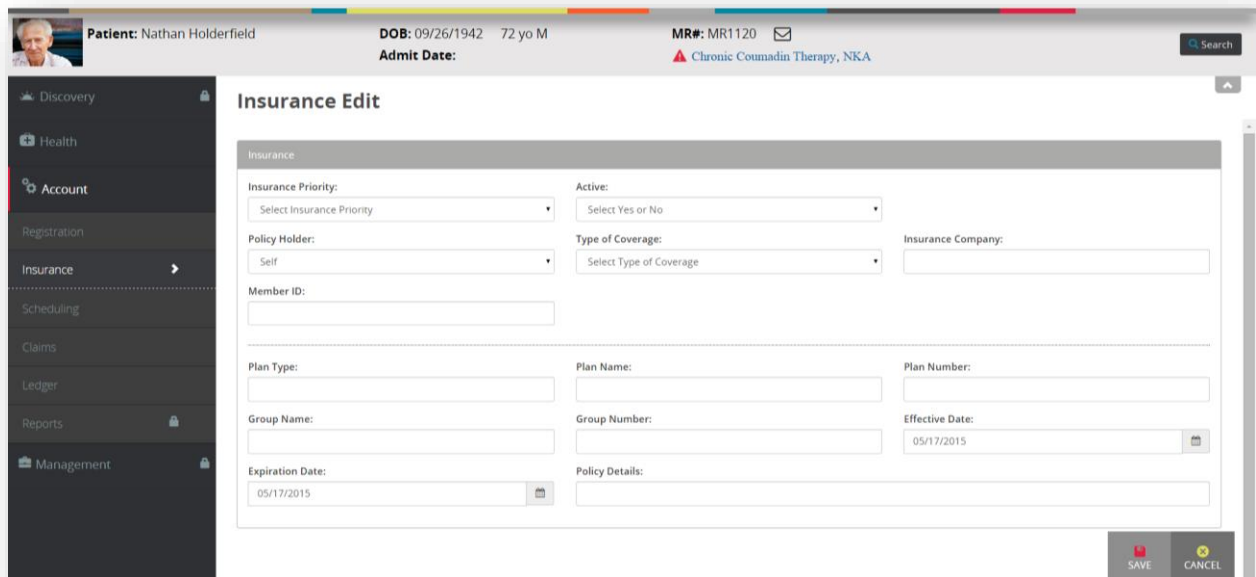
Adding new insurance information

New insurance entries are added for brand new patients, or to add new insurance providers for existing patients, or to add secondary or tertiary insurance accounts for a patient who already has a primary insurance provider. If the patient's insurance has changed, you may choose to Edit their existing information instead (see previous section) or mark the previous entry as not active and create a new entry.

After selecting the Insurance tab for a patient, select **New**.



The following new insurance menu will appear:



The data entered may vary depending on the type of insurance. Therefore, no fields in this section are specifically required. Complete all applicable fields for the patient’s insurance then select **Save**.

Note: It is highly recommended that the Insurance Company field is populated for an entry even if it isn’t necessarily applicable (i.e. for a Medicare entry, enter “Medicare” as the Insurance Company). The Insurance Company field is how a particular insurance provider is selected when filing a claim in Go

Insurance Priority: Select an option from the dropdown list (Primary, Secondary, or Tertiary) or leave as the default “Select priority” if none are applicable.

Active: Select Yes if the insurance is currently valid; otherwise select No.

Policy Holder: Select who is responsible for the policy from the dropdown list. If the patient is responsible, select ‘Self’.



Type of Coverage: Select the coverage type (i.e. Medicare, Group Health Plan, etc.) from the dropdown list. Choose 'Other' if the type is not listed.

Insurance Company: Type the name of the insurance company. This is how the insurance will be selected when filing a claim so even if the insurance entry isn't a "company" (i.e. Medicare), enter a name description in this field.

Member ID: If there is a member ID associated with the account, enter it here. Sometimes this is listed on the card as simply "ID". The format will vary by provider and may include a mix of letters and numbers.

Plan Type: Enter the type of plan here. For example, PPO, HMO, POS, etc. Refer to your textbook or online resource for more information, if needed.

Plan Name: Type the specific plan name, if listed. This may be found on the top or bottom of the card next to the company name.

Plan Number: Type the plan number, if listed.

Group Name: Type the group name, if listed.

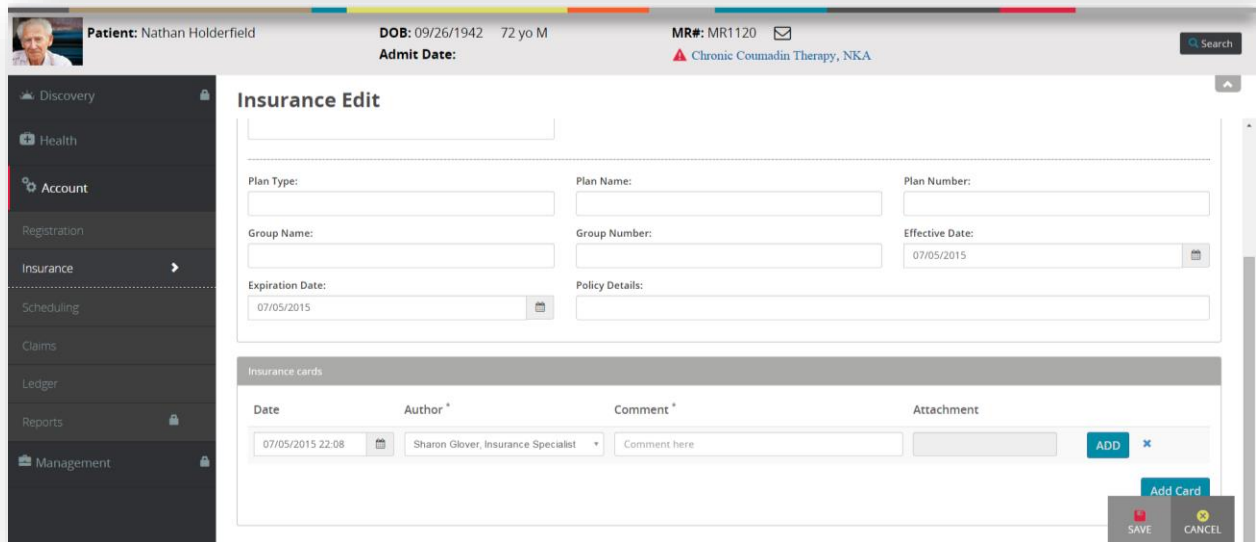
Group Number: Type the group number, if listed.

Effective Date: Select the effective date from the pop-up calendar.

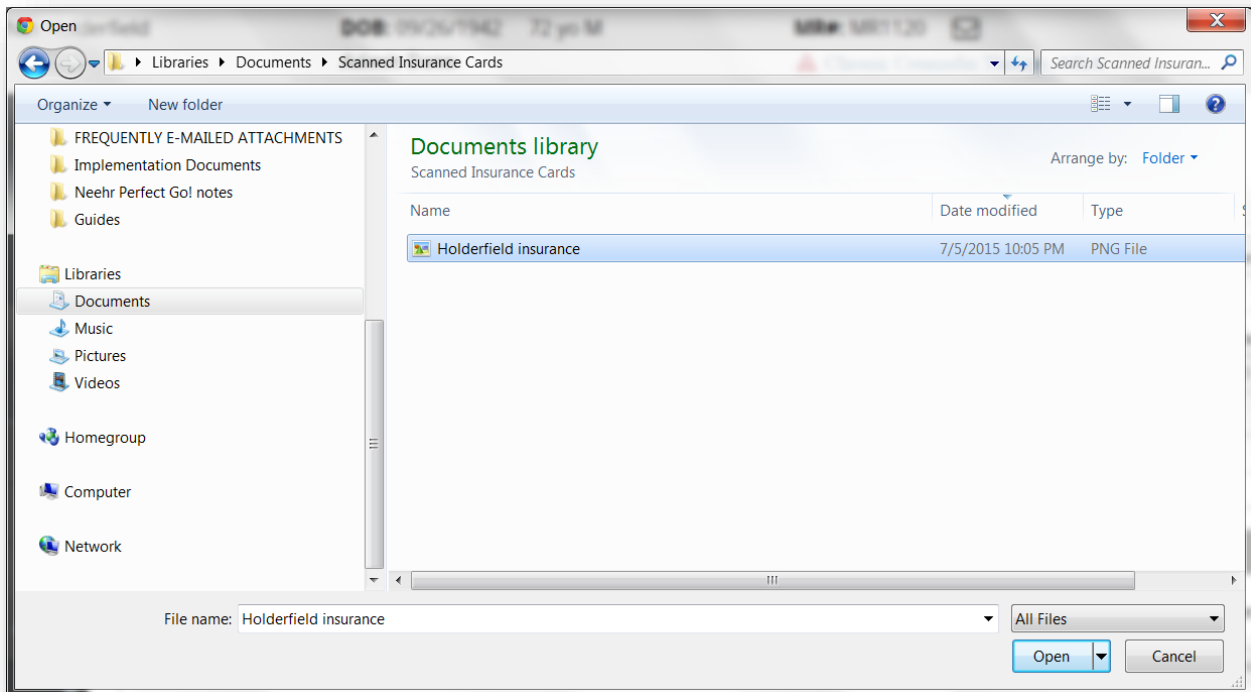
Expiration Date: Select the expiration date from the pop-up calendar. If an expiration date isn't listed, you may need to determine it based on the effective date and the policy term.

Policy Details: Use this field to enter information about the patient's copay and/or deductible.

To to add a scanned image of the insurance card, scroll down to the *Insurance cards* section. Populate the Date, Author, and Comment fields then select **ADD**.



Locate the saved image file then select **Open**.



A link will populate in the Attachment field. Then select **Add Card**.

After completing all applicable fields, choose **Save**. If the patient has another insurance account you'd like to add at this time, select New and repeat these steps.

When finished working in the EHR, click the **Close Session** button in the upper right corner of the EHR to return to the organizer page for this chart or activity. **Important!** This is how your work is saved. Do not close your browser window or tab without clicking Close Session.

Submit your insurance entry(ies) to your instructor by downloading the Progress Report for the EHR Session in Step 3 (see *EHR Go Guide to Completing and Submitting Work*).

Insurance information on other areas of the chart



The patient's insurance information is also accessed on the Claims tab when adding a new claim. It is possible to update insurance information via the Claims tab, if needed. See *EHR Go Guide to Claims in the EHR*.

The screenshot shows the 'Claim Edit' interface. On the left is a dark sidebar with navigation options: Discovery, Health, Account, Registration, Insurance, Scheduling, Claims (highlighted with a right-pointing arrow), Ledger, Reports, and Management. The main content area is titled 'Claim Edit' and includes a 'Status' field with the value 'Married' and a 'Modify Registration Data' button. Below this is the 'Insurance Data' section, which contains two tables. The first table lists insurance information for 'Hospital/Medical' with ID number '304-56-9390-A' and name 'Nathan Holderfield'. The second table lists 'PPO' with ID number 'XYZ543210' and name 'Nathan Holderfield'. Both tables have a 'Modify Insurance' button. At the bottom, there is an 'Appointment Data' section with fields for 'DATE OF APPOINTMENT', 'PT CONDITION IS RELATED TO', 'DATE OF CURRENT', and 'ACCEPT ASSIGNMENT'. A 'Diagnosis or Nature of Illness or Injury' field is partially visible at the very bottom. On the right side of the bottom section are three buttons: 'POST AND SAVE', 'SAVE WITHOUT POSTING', and 'CANCEL'.