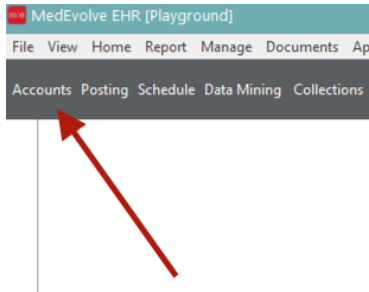
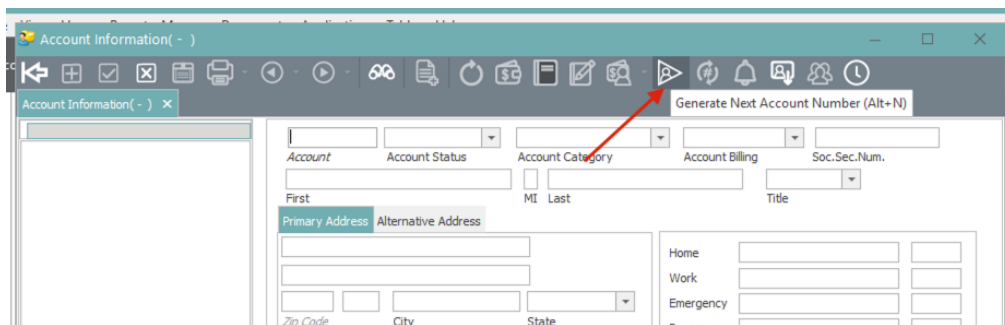


## DEMOGRAPHICS ENTRY

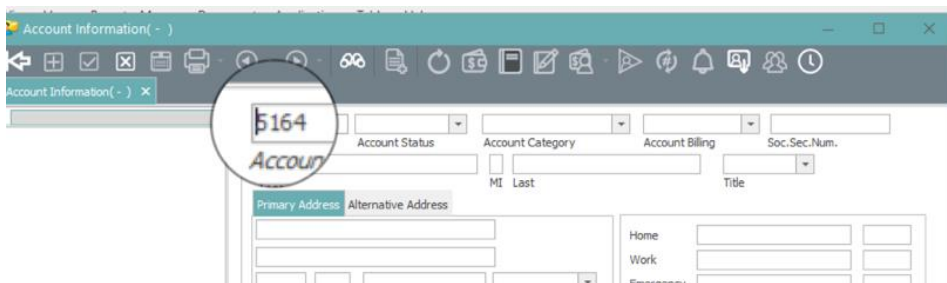
To enter a new patient, click on “Accounts”



Click “generate next account #”

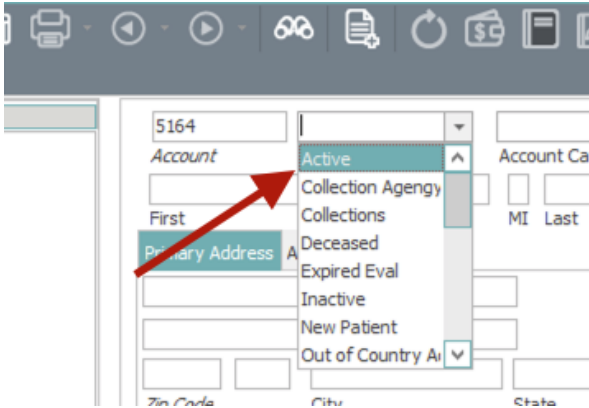


Your new account # will appear here:

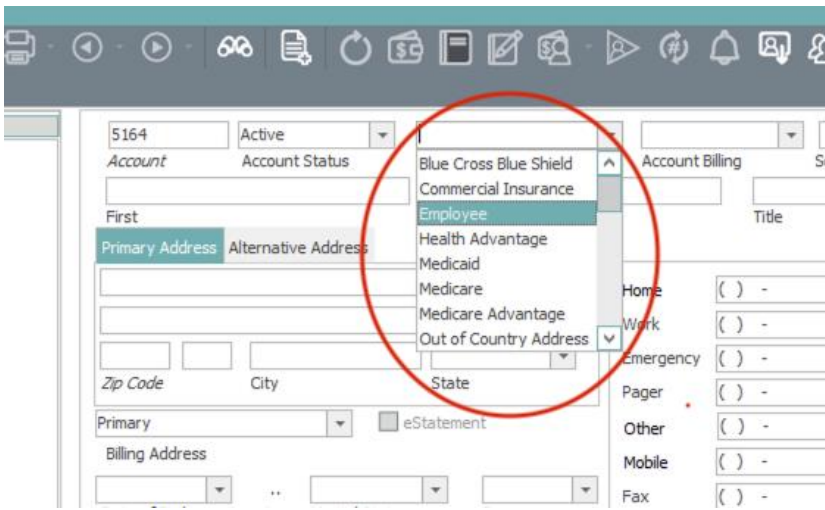


Use “TAB” to move easily through fields...

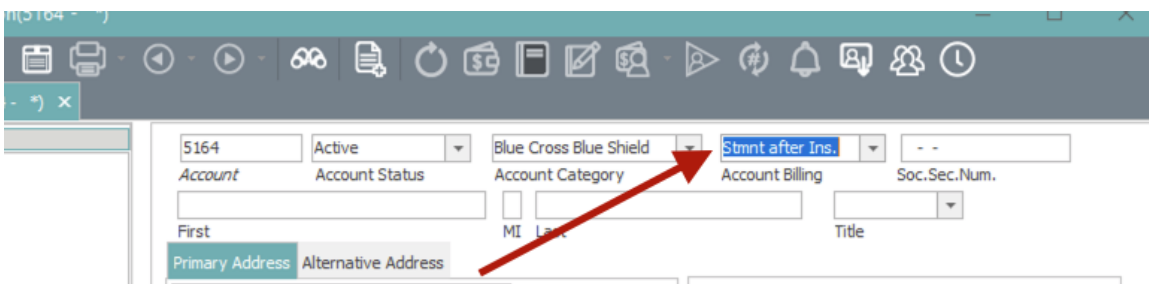
Select account status – it should be “Active”



Next, choose account category (which should match the primary insurance you are entering for that patient)



The “Account Billing” should default to what is appropriate for the “Account Category” and should automatically populate. For example, BCBS would say “send statement after ins”



Proceed to enter as much demographics information you have on the patient as shown below, tabbing through so that fields which populate automatically will populate

Click "APPLY" to save and stay on the page

	Acct Resp	Ins Resp	Total
Total	\$0.00	\$0.00	\$0.00
0-30	\$0.00	\$0.00	\$0.00
31-60	\$0.00	\$0.00	\$0.00
61-90	\$0.00	\$0.00	\$0.00
91-120	\$0.00	\$0.00	\$0.00
121-150	\$0.00	\$0.00	\$0.00
151 +	\$0.00	\$0.00	\$0.00

Once you "APPLY", the information tree will appear on the left side of the demo screen... RIGHT CLICK on "Insurance" then click "NEW" to select insurance plan and enter insurance information

Click the italicized *Insurance Plan* to select insurance.

The screenshot shows the 'Account Insurance' form. The 'Insurance Plan' field is highlighted with an orange arrow. The form includes fields for Insurance Plan, Seq Number, Status, Status Date, Insurance Category, Effective Date, Expiration Date, Co-Pay, Deduct Amt., Deduct Used, Insurance ID, Insurance Group ID, Insurance Group Name, Eligibility Status, Last Updated, Medicare Secondary Reason Code, and checkboxes for Auto File, Accept Assign, Transmit, Auth. Payment, Medigap, and Auto File if Secondary. Personal information fields include Rel. to Holder, First, MI, Last, Title, Zip Code, City, State, Date of Birth, Sex, Empl. Status, Phone, and Ext.

Here you can type in the first few letters of the insurance plan you need and a list will come up. Click "OK" once you highlight the one you want. In this case, "blue cross" code 19 is the correct one

The screenshot shows the 'Account Insurance' form with a 'Searching Insurance Plans...' dialog box open. The dialog box has a search input field containing 'blue'. Below the search field is a table of search results. The first row, 'blue cross' with code 19, is highlighted. An orange arrow points to the 'OK' button at the bottom right of the dialog box.

Plan Name [Begins With]	City [Begins With]	Phone [Begins With]	Prof Payer ID [Begins With]	Ins Payer ID [Begins With]
blue cross	19	blue cross	Mayflower	AR 72106
Blue Cross Blue Shield Texas	25	1234 Nonesuch Drive	Little Rock	AR 72201
Blue Cross Blue Shield Tex...	26	1234 Nonesuch Drive	Little Rock	AR 72201
Blue Shield	BS	1234 BS road	No. Little Rock	AR 72114
bluecross	bb	1234 financial lane	Cabot	AR 72023

The arrow below shows where the plan is populated. Enter the information needed in the highlighted sections. Click “OK” to save and close or “APPLY” to save and stay on the screen.

The screenshot shows the 'Account Insurance' form with the following fields and values:

- Insurance Plan: 19 blue cross
- Seq Number: 1
- Status: Active
- Status Date: 02/13/2020
- Blue Shield: [Dropdown]
- Insurance Category: [Dropdown]
- Effective Date: [Text]
- Expiration Date: [Text]
- Co-Pay: \$0.00
- Deduct Amt.: \$0.00
- Deduct Used: 0
- Insurance ID: XYZ12345678910
- Insurance Group ID: [Text]
- Insurance Group Name: [Text]
- Eligibility Status: [Text]
- Last Updated: [Text]
- Medicare Secondary Reason Code: [Dropdown]

Checkboxes:

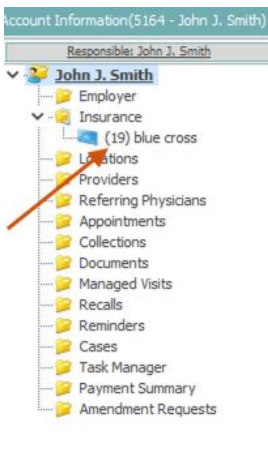
- Auto File
- Accept Assign
- Transmit
- Auth. Payment
- Medigap
- Auto File if Secondary

Demographics:

- Rel. to Holder: Self
- First Name: John
- MI: J
- Last Name: Smith
- Title: Mr.
- Address: 1 Apple St
- Zip Code: 07094
- City: Secaucus
- State: New Jersey
- Date of Birth: 05/01/1998
- Sex: Male
- Empl. Status: Unknown
- Phone: (201) 432-2894
- Ext.: [Text]

Buttons: Show Plan, New, OK, Cancel, Apply

Once complete and saved, you will see your insurance plan on the demo screen tree on left hand side:



The demographics and insurance information for this patient should be saved at this time.