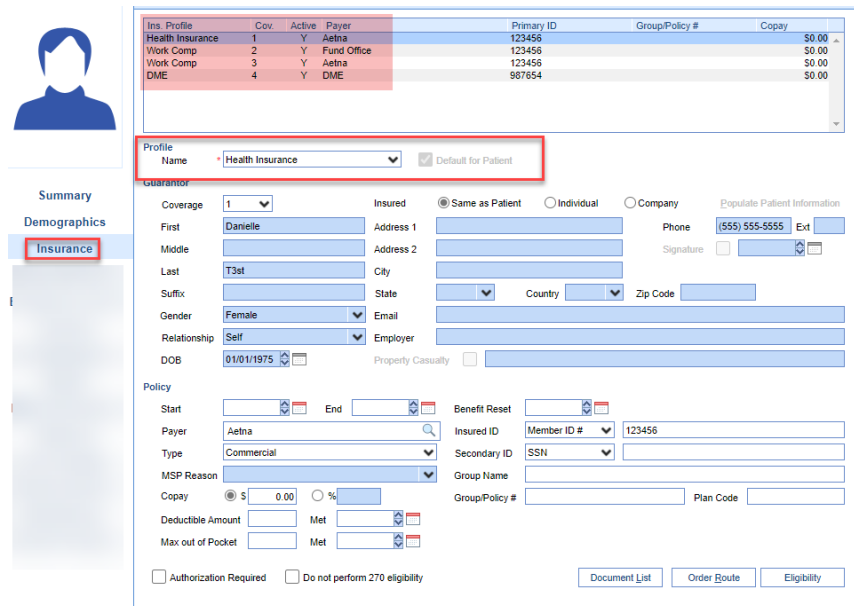


Insurance Profiles

Last Modified on 08/28/2026 2:44 pm EDT

Insurance Profiles allow multiple primary insurances according to each visit for a single patient. Typically, this is used for offices that have patients using workers comp/no fault and commercial insurances that are both primary depending on which condition they're being seen for.

- The Patient Setup Screen

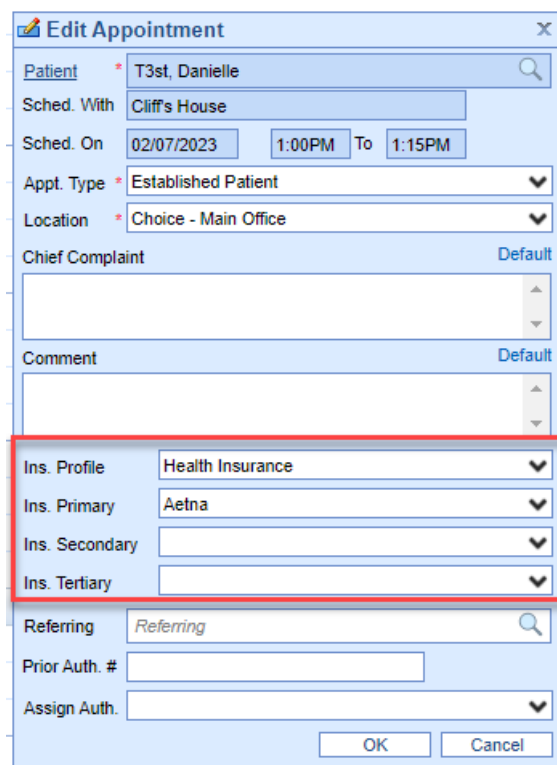


The Patient Setup Screen displays a patient's insurance profiles and demographic information. On the left, a sidebar shows navigation options: Summary, Demographics, and Insurance (highlighted). The main area is divided into two sections. The top section, titled 'Ins. Profile', shows a table of active insurance profiles:

Ins. Profile	Cov.	Active	Payer	Primary ID	Group/Policy #	Copay
Health Insurance	1	Y	Aetna	123456		\$0.00
Work Comp	2	Y	Fund Office	123456		\$0.00
Work Comp	3	Y	Aetna	123456		\$0.00
DME	4	Y	DME	987654		\$0.00

The bottom section, titled 'Guardian', contains fields for patient demographics and insurance details. The 'Profile Name' dropdown is set to 'Health Insurance' and is marked as the 'Default for Patient'. Other fields include Coverage (1), Insured (Same as Patient), Payer (Aetna), Type (Commercial), MSP Reason, Copay (\$0.00), Deductible Amount, Max out of Pocket, and various identification numbers (Insured ID, Member ID, SSN, Group Policy #). Buttons at the bottom include 'Document List', 'Order Route', and 'Eligibility'.

- iScheduler



The Edit Appointment form displays patient information and appointment details. The 'Patient' field is set to 'T3st, Danielle'. The 'Sched. With' field is set to 'Cliff's House'. The 'Sched. On' field is set to '02/07/2023' from '1:00PM' to '1:15PM'. The 'Appt. Type' is set to 'Established Patient' and the 'Location' is set to 'Choice - Main Office'. The 'Chief Complaint' and 'Comment' fields are empty. The 'Ins. Profile' dropdown is set to 'Health Insurance', and the 'Ins. Primary' dropdown is set to 'Aetna'. The 'Referring' field is set to 'Referring'. The 'Prior Auth. #' and 'Assign Auth.' fields are empty. Buttons at the bottom include 'OK' and 'Cancel'.

- The Claim Screen

Open Save History Payments Patient Search for Patient

Status

Claim 66394

Status Ready to Send Primary, Electronic

Substatus

Level Primary Billing Electronic

Type Medical

Owner Seals, Danielle

837 Professional Institutional

Patient

Patient 93986 - Danielle T3st (555) 555-5555

Pat. Location Patient Location

Pat. Provider Patient Provider

Resp. Party T3st, Danielle

Ins. Profile Health Insurance

Primary (1) Aetha

Secondary (2) Fund Office

Tertiary

Override Insurance Authorization

Service

Location Choice - Main Office

Rendering Cool MD, Carly

Referring Referring Provider

Referred

Other Providers

Procedures and Diagnoses (1)

How to set an Insurance Profile for a patient

Once in the Patient Setup screen you will be able to document an Insurance Profile when adding an insurance by selecting the appropriate Profile.

1. Assign a profile to this insurance grouping
2. Assign Guarantor
3. Enter Payer information
4. Assign default Insurance Profile

* Coverage numbers will remain in order of entry and can be changed. The order they are listed in the Insurance Profile will be the indicator of primary, secondary, tertiary, quaternary.

Patient Setup

New Save Train More

Ins. Profile	Cov.	Active	Payer	Primary ID	Group/Policy #	Copay
Health Insurance	1	Y	Aetna	123456		\$0.00
Work Comp	2	Y	Fund Office	123456		\$0.00
Work Comp	3	Y	Aetna	123456		\$0.00
DME	4	Y	DME	987654		\$0.00

1 Profile Name: **4** ☒ Default for Patient

2 Guarantor Coverage: Insured: ☒ Same as Patient ☐ Individual ☐ Company [Populate Patient Information](#)

First: Address 1: Phone: Ext:

Middle: Address 2: Signature:

Last: City:

Suffix: State: Country: Zip Code:

Gender: Email:

Relationship: Employer:

DOB: Property Casualty: ☐

3 Policy Start: End: Benefit Reset:

Payer: Insured ID: 123456

Type: Secondary ID:

MSP Reason:

Copay: ☒ \$ 0.00 ☐ %

Deductible Amount: Met:

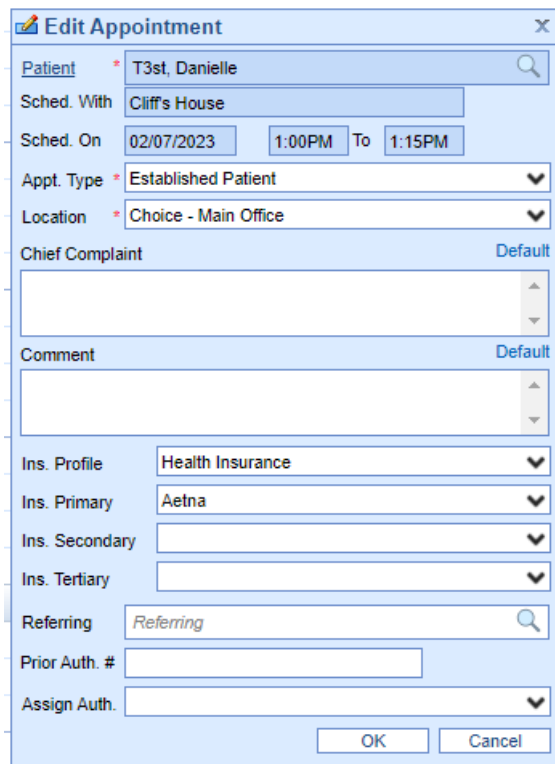
Max out of Pocket: Met:

☐ Authorization Required ☐ Do not perform 270 eligibility

[Document List](#) [Order Route](#) [Eligibility](#)

Assigning an Insurance Profile to an appointment

1. Select Ins Profile to be used for this appointment
2. Primary, Secondary and Tertiary policies added within the Patient Setup will populate according to that Insurance Profile
3. These will be the insurances used on the claim



Edit Appointment

Patient * T3st, Danielle

Sched. With Cliff's House

Sched. On 02/07/2023 1:00PM To 1:15PM

Appt. Type * Established Patient

Location * Choice - Main Office

Chief Complaint Default

Comment Default

Ins. Profile Health Insurance

Ins. Primary Aetna

Ins. Secondary

Ins. Tertiary

Referring Referring

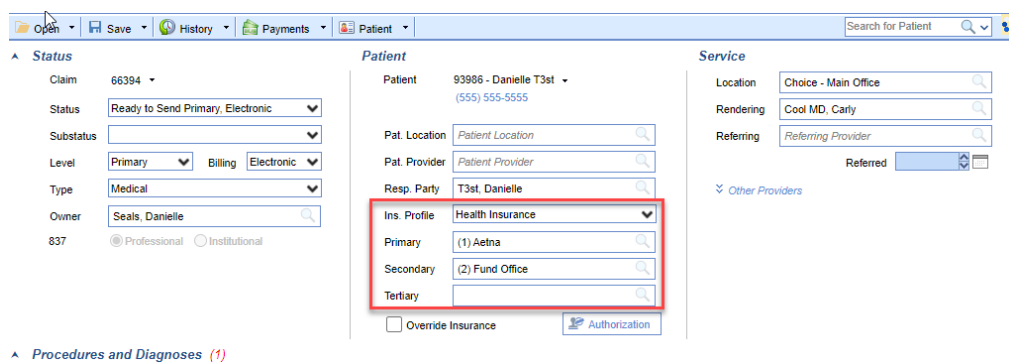
Prior Auth. #

Assign Auth.

OK Cancel

Assigning an Insurance Profile to a claim

1. To assign an Insurance profile to a claim navigate to the insurance area on the claim
2. Select the Insurance Profile to be used
3. Primary, Secondary and Tertiary policies added within the Patient Setup will populate according to that Insurance Profile



Open Save History Payments Patient Search for Patient

Status

Claim 66394

Status Ready to Send Primary, Electronic

Substatus

Level Primary Billing Electronic

Type Medical

Owner Seals, Danielle

837 Professional Institutional

Patient

Patient 93986 - Danielle T3st (555) 555-5555

Pat. Location Patient Location

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Resp. Party T3st, Danielle

Ins. Profile Health Insurance

Primary (1) Aetna

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Tertiary

☐ Override Insurance Authorization

Service

Location Choice - Main Office

Rendering Cool MD, Carly

Referring Referring Provider

Referred

Other Providers

Procedures and Diagnoses (1)