

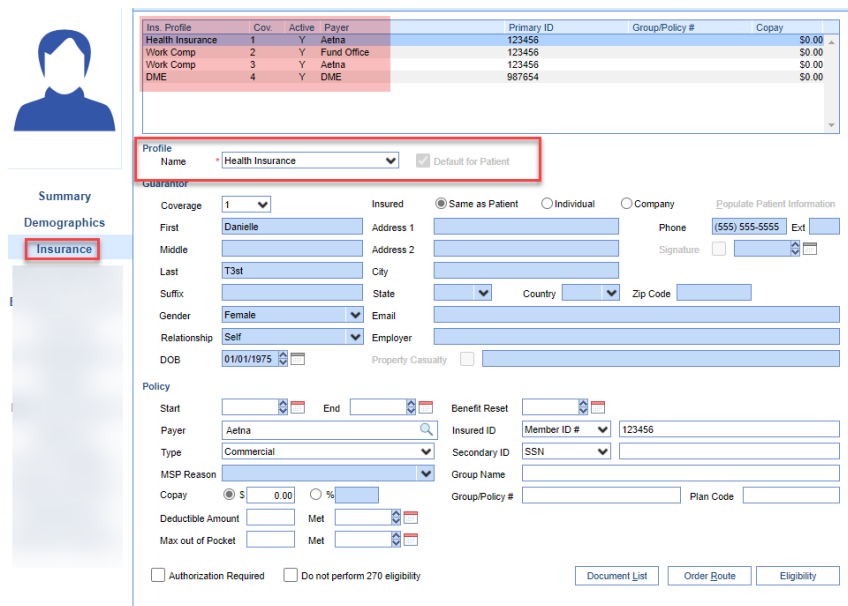
Insurance Profiles

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

Insurance Profiles

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 screenshot displays the Patient Setup Screen with a sidebar on the left containing 'Summary' and 'Demographics' sections. The 'Insurance' tab is selected. The main area shows a table of insurance profiles and a form for patient details.

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

Profile
Name: Health Insurance ☒ Default for Patient

Guarantor
Coverage: 1 Insured: ☒ Same as Patient ☐ Individual ☐ Company [Populate Patient Information](#)
First: Danielle Address 1: Phone: (555) 555-5555 Ext:
Middle: Address 2: Signature:
Last: T3st City: State: Country: Zip Code:
Suffix: Gender: Female Email:
Relationship: Self Employer:
DOB: 01/01/1975 Property Casualty:
Policy
Start: End: Benefit Reset:
Payer: Aetna Insured ID: Member ID # 123456
Type: Commercial Secondary ID: SSN:
MSP Reason: Group Name:
Copay: ☒ \$ 0.00 ☐ % Group/Policy #: Plan Code:
Deductible Amount: Met:
Max out of Pocket: Met:
☐ Authorization Required ☐ Do not perform 270 eligibility [Document List](#) [Order Route](#) [Eligibility](#)

- iScheduler

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

- The Claim Screen

Patient Setup

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) Aetna

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:

Group Name:

Copay: ☒ \$ ☐ %

Group/Policy #: Plan Code:

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

Comment

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

Pat. Provider Patient Provider

Resp. Party T3st, Danielle

Ins. Profile Health Insurance

Primary (1) Aetna

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)