

# Attaching insurances

When looking at a patient's chart under the registration for a specific appointment, there are several things to look for to confirm that we have the insurance added to the appointment for them! Below we will discuss what you should look for, both when checking a patient in and when an appointment is being made.

## When checking in a patient

When in the check in registration, you will see multiple tabs that shows a LARGE amount of patient information. One of those tabs is "Encounter Guarantor and Coverages." When you are looking at that tab, you will see the following information.

The screenshot shows the 'Encounter Guarantor and Coverages' tab. On the left, there is a patient icon and a dropdown menu showing 'P/F - Mother'. To the right of the icon, there is a section for 'Address same as patient' with a checkbox, 'MyChart Active' with a checkbox, and 'Luther Memorial Home - Unknown' with a checkbox. Below these is a note 'No FPL info on file'. To the right of this section, there is a 'Member ID' field, a 'Subscriber ID' field, and a 'Group' field. To the right of these fields, there is a 'Relationship to Subscriber' field showing 'Self'. At the bottom right, there is a note 'Effective from 7/1/2020'. The top right corner has an 'Account Actions' dropdown menu.

As you can see, it indicates that there is an insurance that is displayed. That MNMA insurance is showing up here to show that it is attached to this visit specifically. You can see that if you select the tab as well with a slightly different look shown below.

The screenshot shows the 'Visit Guarantor' and 'Visit Coverages' tabs. The 'Visit Guarantor' tab is selected, showing a patient icon and a dropdown menu showing 'Type: Personal Family' and 'Rel to Pat: Mother'. Below this, there is a 'Visit Coverages' section. It has a table with columns: Coverage, Subscriber, Insurance ID, and Effective Dates. The table has one row with the following data: Coverage: E-MN HEALTHCARE PROGRAMS/MINN MED ASSIST DENTAL, Subscriber: [redacted], Insurance ID: [redacted], Effective Dates: 07/01/2020 - [redacted]. The table has a 'Close' button at the bottom left and 'Previous' and 'Next' buttons at the bottom right. The top right corner has an 'Account Actions' dropdown menu and a '+ Add Coverage' button.

You can tell that the insurance is attached to the visit here as it is listed under "Visit Coverages."

## Appointment Registration

To start, let's define "appointment registration." Appointment registration is the view of the registration you see when you go to the appointment in the DAR or Snapboard and enter the registration from there directly rather than going to the appointment desk then the registration. When in the appointment registration, you will see the same view as the examples from the check in process, but you will have access to another view under the "Pat Guar and Cvg" button on the top left of the menu.

Registration

Pat Guar and CvgResponse H

REGISTRATION INFO

Demographics

Patient Guarantor Accounts

Shog Coverages

Show Inactive Guarantors

Add Guarantor

Account ID	Guarantor	Type	Rel to Patient	Verification Status
		P/F	Mother	Elapsed

E-MN HEALTHCARE PROGRAMS [30...]

Effective since 1/1/2023

Add Coverage

Patient Coverages

Filing Order

Undo Changes

Show Ineffective Coverages

F/O	Coverage	Subscriber	Insurance ID	Effective Dates	Verification Status
1	E-BCBS BLUEPLUS OF MN [943]BLUE ADVANTAGE [668]			01/01/2019 -	E-Verified
2	E-MN HEALTHCARE PROGRAMS [303]MINN MED ASSIST DENTAL [777]			01/01/2023 -	New
3	E-MN HEALTHCARE PROGRAMS [303]MINN MED ASSIST DENTAL [777]			06/01/2020 -	Elapsed

From this screen, you see a couple of things that are new. The above boxes attached to the guarantor show insurances that are attached to the guarantor and can be automatically attached to any visit for the billing team. What you see below those boxes are insurances attached to the PATIENT account. These coverages are a part of the patient account because they have been added at another clinic that is not Spectra Health. These insurances can be selected so that they can be added quickly to a guarantor account for billing by hitting the “Add Coverage” option in the empty box and selecting the coverage from the list shown in that menu that you wanted to add.

Select Existing Coverage

E-BCBS BLUEPLUS OF MN [943]BLUE ADVANT...  
Effective since 1/1/2019  
Group Number: MNMC008S

E-BCBS BLUEPLUS OF MN [943]BLUE ADVANT...  
Not on current patient  
Group Number: MNMC008S

E-BCBS BLUEPLUS OF MN [943]BLUE ADVANT...  
Not on current patient  
Group Number: MNMC008S

E-MN HEALTHCARE PROGRAMS [303]MINN ME...  
Effective since 1/1/2020

E-MN HEALTHCARE PROGRAMS [303]MINN ME...  
Not on current patient

E-MN HEALTHCARE PROGRAMS [303]MINN ME...  
Not on current patient

You will see many more options that are attached to other patients that the guarantor is attached to. It is best practice to double check all the names, and whether the insurance is on current patient of not as highlighted above, to ensure we are adding the correct insurance to the correct patient.

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