

Knowledgebase Article: *Mixing Private and Insurance Visits*

Abstract:

Some offices will have patients/clients who receive a mix of services; some of which are covered by insurance and others that are not. This can present a challenge in the production of statements at the end of the month. This article describes some strategies to deal with this challenge.

Underlying Problem:

Capable 21C classifies each patient as either Private or Insurance. Once so classified, the selection of services may be automated during receipting such that a service specifically configured for the insurance company will be chosen when the receipt is opened. Whilst this can be convenient for receipting patients/clients who are wholly insurance funded, it makes it easy for an operator to accidentally invoice the patient/client for the wrong service.

In addition, Capable 21C retains a record of whether patients/clients receive a private style statement or an insurance style statement and will only produce one or the other during a statement run. This can present challenges for clinics who wish to recover both insurance debts and private debts.

Resolution:

For patients who mix-n-match insurance funded services with private services, it is not possible for Capable 21C to anticipate what will occur on any particular visit. For this reason, there will always be a heavy reliance on the operator to select the appropriate appointment type and/or the appropriate service. The following information is intended to assist operators by automating the most common scenario.

To reduce the risk of accidents during invoicing/receipting, the following strategies may be employed:

1. Create an appointment type for Insurance funded visits. Ensure that patients are booked for the appropriate kind of appointment, and Capable 21C will then receipt the customer appropriately.
2. Assess which scenario is most common (eg more patients are wholly insurance funded, or more patients are mix-n-match), and then configure the appointment type to automatically select the services that are most commonly used.

For offices that elect to recover private debts as well as insurance debts on the same patient/client files, the following suggestions are offered.

1. Define a category for these patients (eg Mix-n-match).
2. Tick this category for each patient that has mixed billing.
3. When statements are produced, use this category filter to see which patients require two statements, so that a private run can be executed after the insurance run is performed.

Detailed Instructions:

To create a Mix-n-Match category:

1. Go to Setup|Setup Patient/Client Categories.
2. Click the button to Add a New Category.
3. Name the category 'Mix-n-match'.

To include a patient in the Mix-n-match category:

1. Go to Patient Details for that patient.
2. Go to the Personal tab.

3. Tick the Mix-n-match checkbox.
4. Click Save and Exit.

To filter out Mix-n-match patients in statement runs:

1. When the Statements window is open, click the Advanced Filter button.
2. Tick the checkbox for Mix-n-match patients.
3. Peruse all patients/clients who are still 'Ok' to print. Ensure that each of them is earmarked to receive an Insurance Statement.
4. Click the Advanced Filter button again and remove the tick in the checkbox for Mix-n-match.
5. Drop down the box that allows selection of Insurance Statements only.
6. Drop down the box that allows the selection of the insurance company and select an insurer or 'All insurers'
7. Click the 'Print Statements' button to print all statements.
8. Repeat steps 5 and 6 as needed to print statements for other insurers.
9. Drop down the box that allows selection of Insurance Statements only and change it back to 'All statements'.
10. Click the Advanced Filter button again and re-select the checkbox for Mix-n-match.
11. Peruse all patients/clients who are now 'Ok' to print and change their statement type to 'Private'.
12. Click the Advanced Filter button again and remove the tick for Mix-n-match.
13. Drop down the box that allow selection of Insurance Statements only and change it to 'Private Statements Only'.
14. Click the Print Statements button to print all private statements.