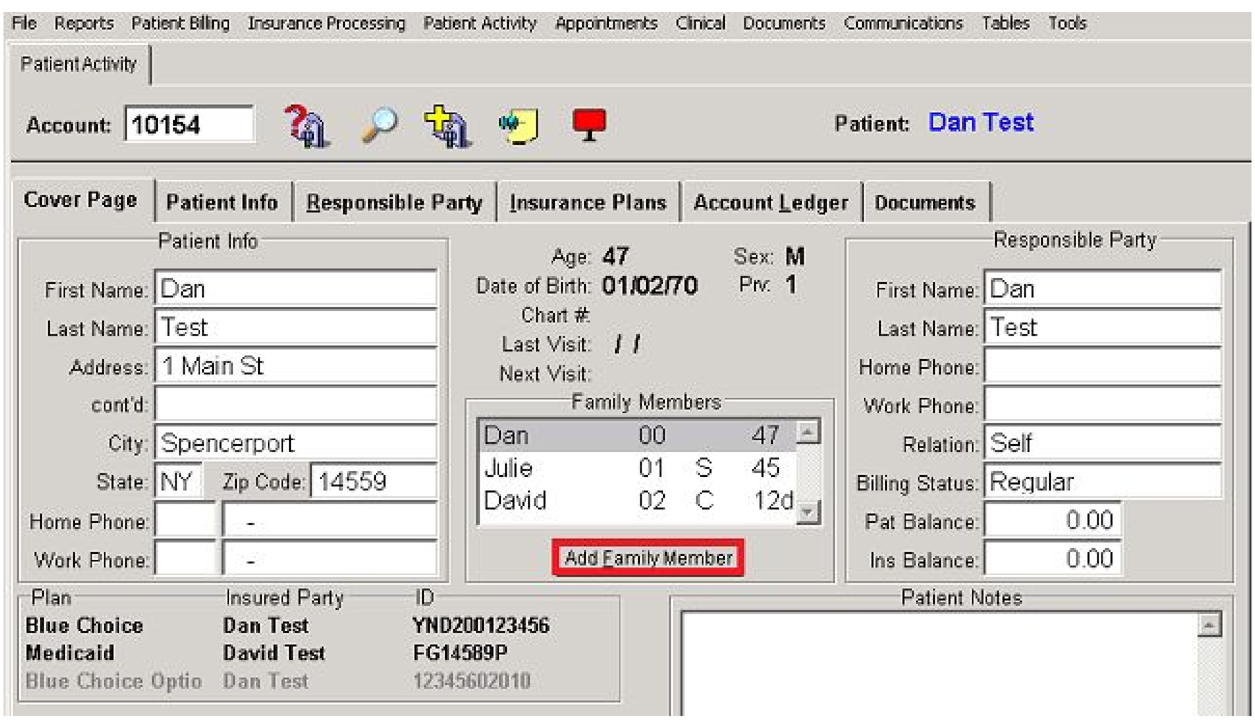
Family Accounting

Including:
Adding a Family Member
Linking Insurance Plan to New Family Member
Adding New Insurance Plan for New Family Member
Separating a Patient from a Family Account
Merging Accounts
Using/Searching for Family Account #'s

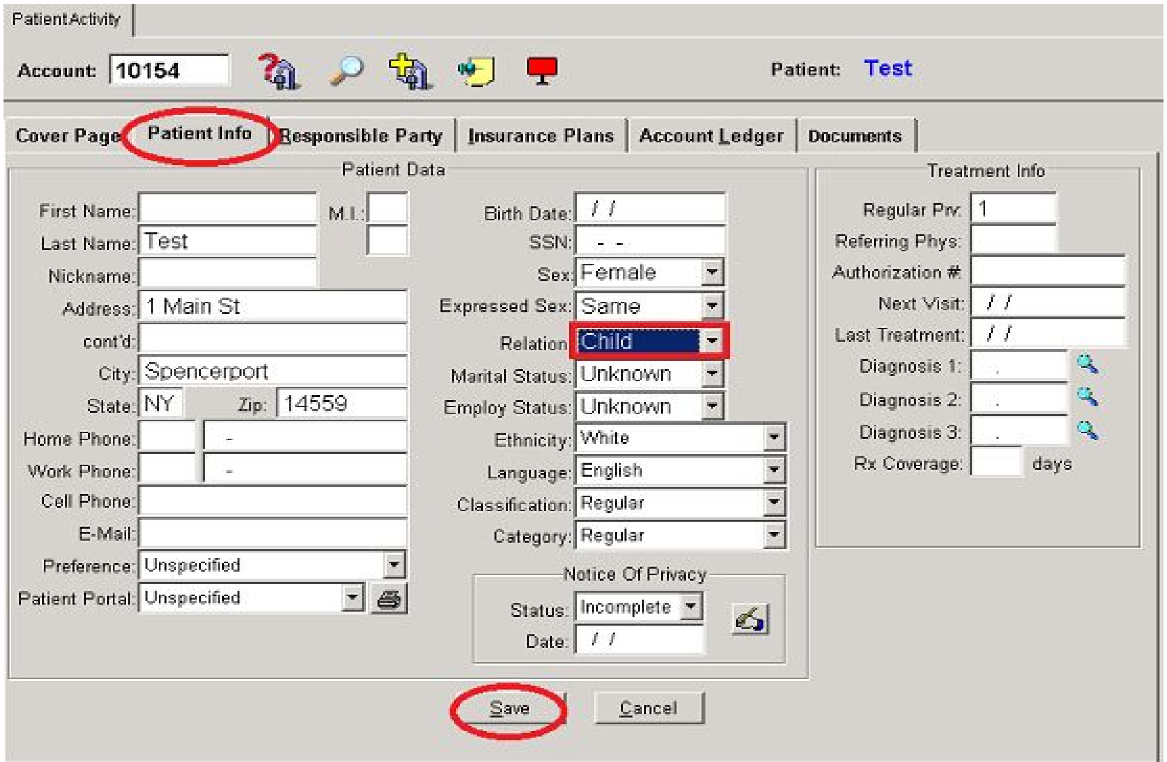
- Family accounting can only have one responsible party for all listed members.
- Patient number (00, 01, etc.) is assigned by order in which patients are registered.
- The responsible party on patient 00 will carry over as the responsible party on added family members (01, 02, etc.).
- Family members may have different insurances.
- Bills generated will be sent care of responsible party for all persons on family account.
- If a patient who is a minor has a different responsible party than the rest of the family, do not put them on the Family Account.

Adding a Family Member

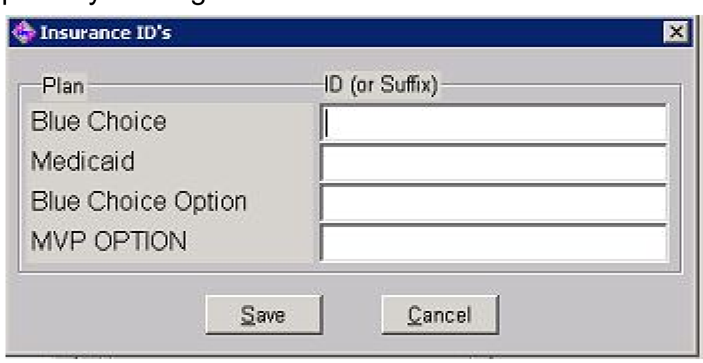
Create a new account if family is new to practice or search for previously established family member. Click **Add Family Member**.



Patient Info tab will open. Some information will prefill. *Enter what your practice normally captures for new patient registration such as birth date, gender, etc*. Change **Relation** field in dropdown box. This is relationship patient has to responsible party. Save.

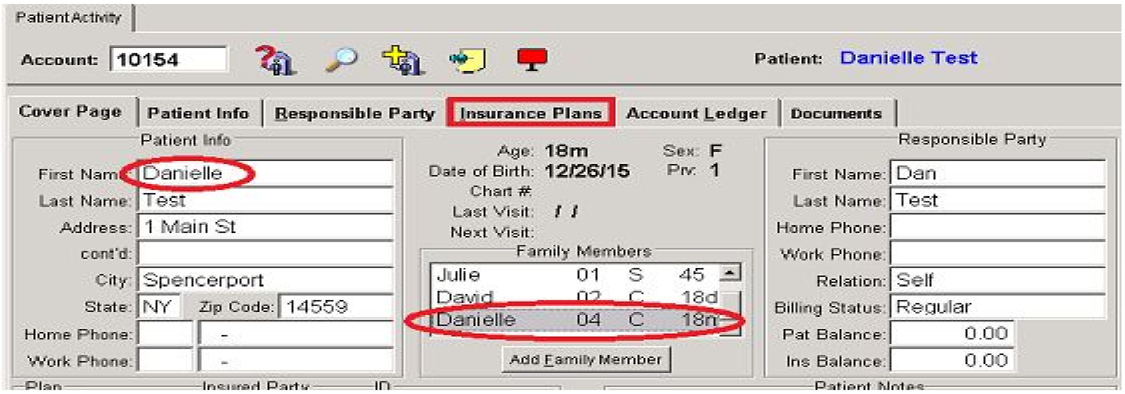


Clicking Save, will open the **Insurance ID** window. If new family member has been ***assigned a suffix on the insurance card,*** enter it here under the correct plan and save. Otherwise by pass by clicking cancel.



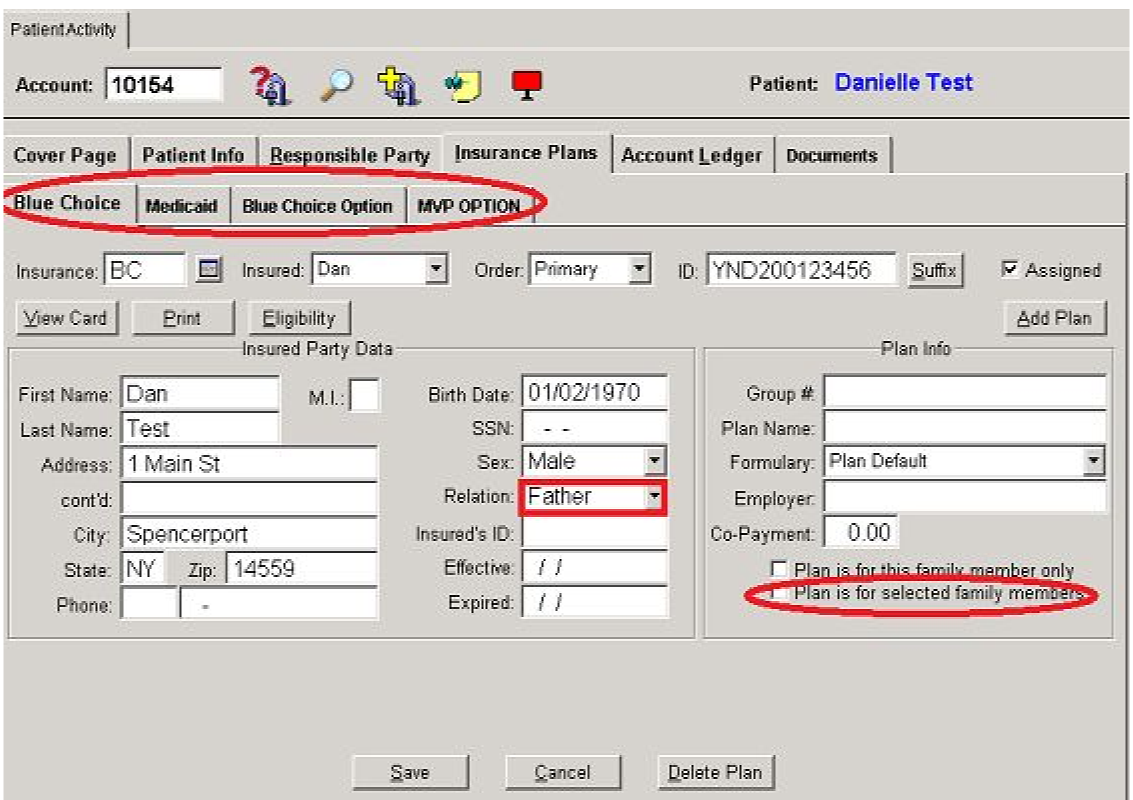
Linking Account Insurance Plan to New Family Member

From Patient Activity Screen, search for correct family member. Click on **Insurance Plans** tab.



Insurance plan the new family member is covered under may already be on family account. If so, choose correct one from the tabular list.

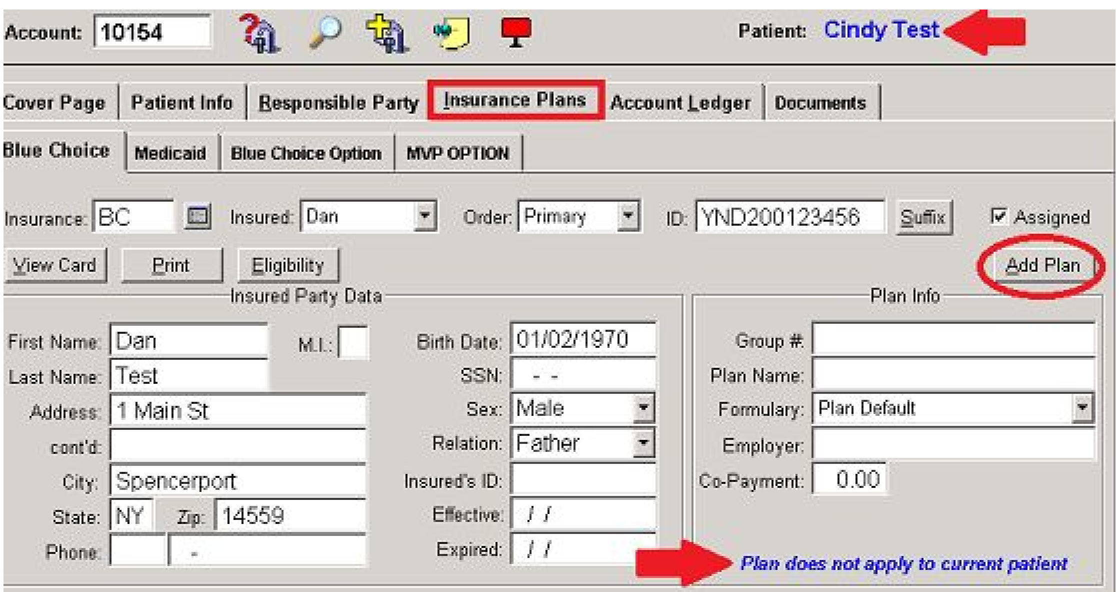
Make sure Insured Party info is correct. Update **Relation** dropdown box to reflect the subscribers' (insured party) relation to the the patient. In this example, Dan is father of new family member, Danielle.



Checking **“Plan is for selected family members**” in the bottom right corner will bring up **Select Family Members** window. Choose family members covered under plan, (in this example, Blue Choice) and click OK.

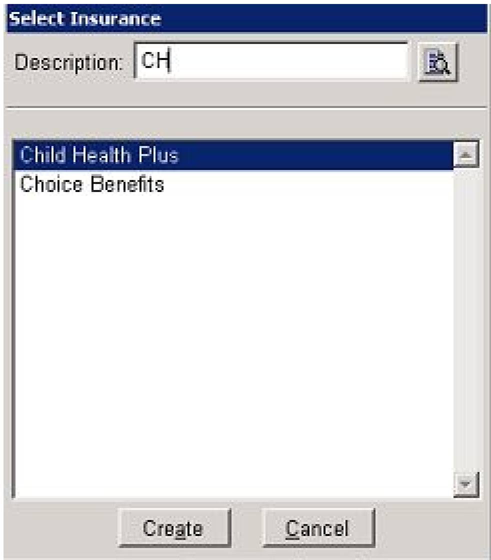
<u>Adding New Insurance Plan for New Family Member</u>

From Insurance Plans screen, click on **Add Plan**.

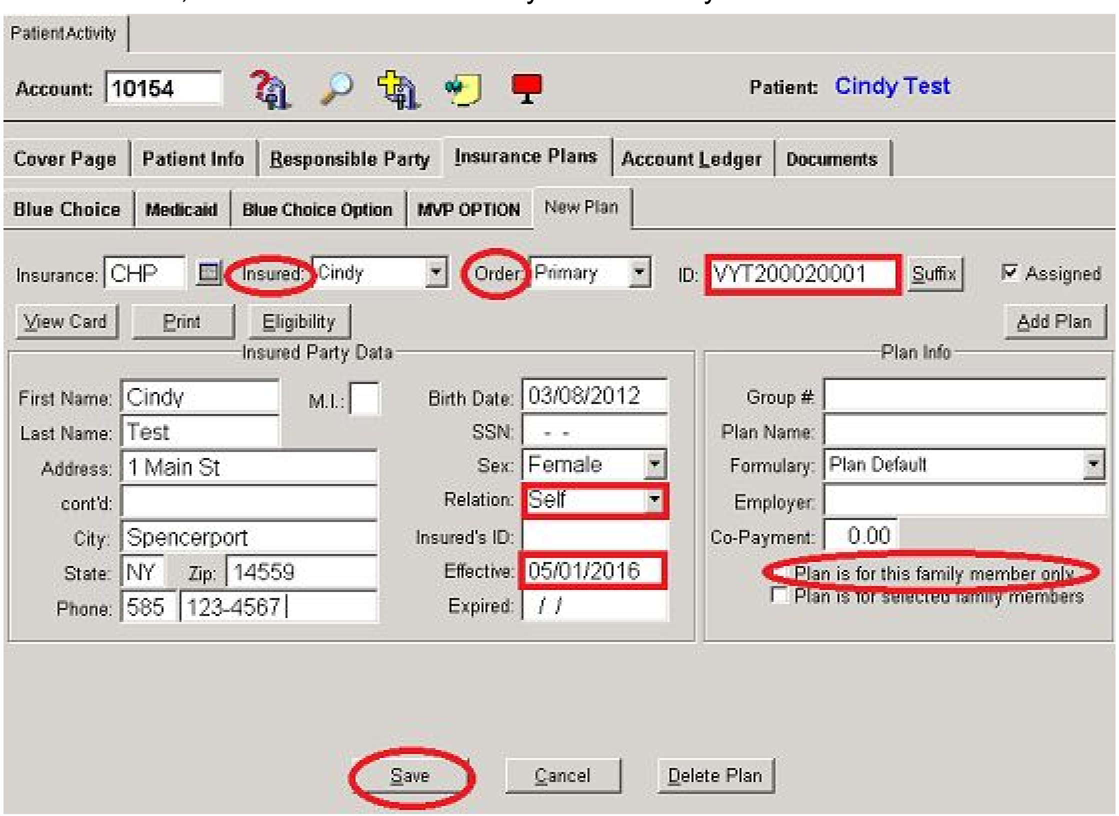


In this example, we have added New Family Member, Cindy Test who has CHP. BC plan will prefill but message in bottom right will show “Plan does not apply to current patient” so click Add Plan.

Select Insurance window will open. Type in description of plan and click on correct one or choose create to enter a new plan.

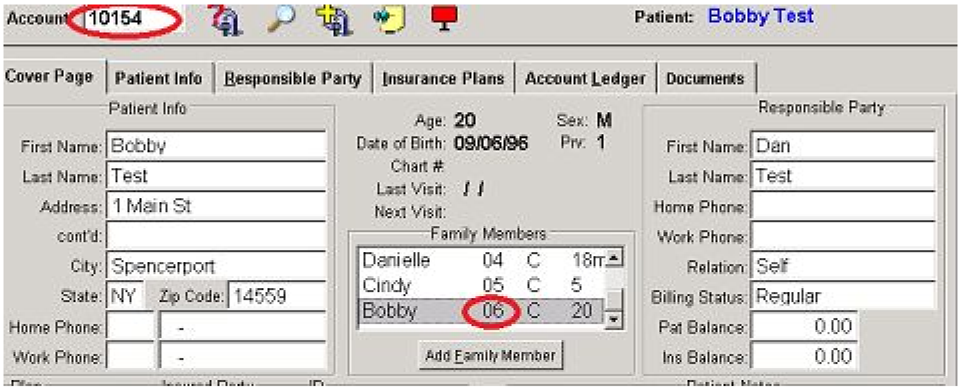


In this case, by clicking on Child Health Plus, CHP will appear as insurance for new family member, Cindy.   Fill in all Insured Party Data including choosing **Insured** from dropdown box as well as choosing **Order** and entering **Insurance ID #.** Make sure **Relation** box is updated. Enter **Effective** date of insurance from card. If new family member is the only one covered on this insurance, click “Plan is for this family member only”. Save.

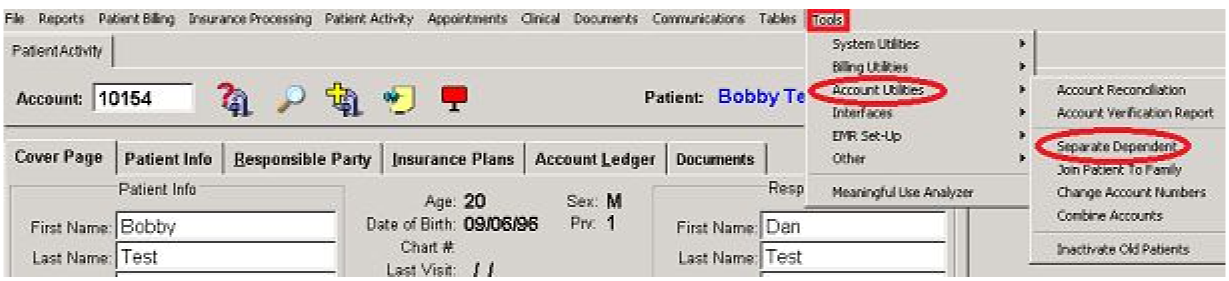


Separating a Patient from a Family Account

Identify account # and **suffix** of family member that needs to have their own account.

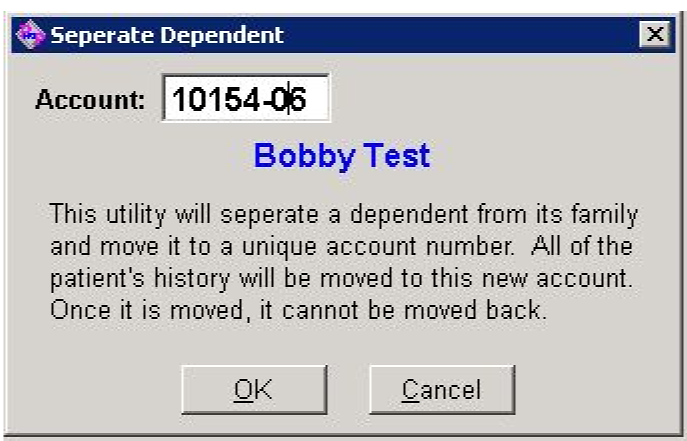


Choose Tools, Account Utilities, **Separate Dependent**.



Enter Account # with Suffix which will bring up patient's name. Warning: Once patient account is moved, it cannot be rejoined to Family Account.

Click OK.



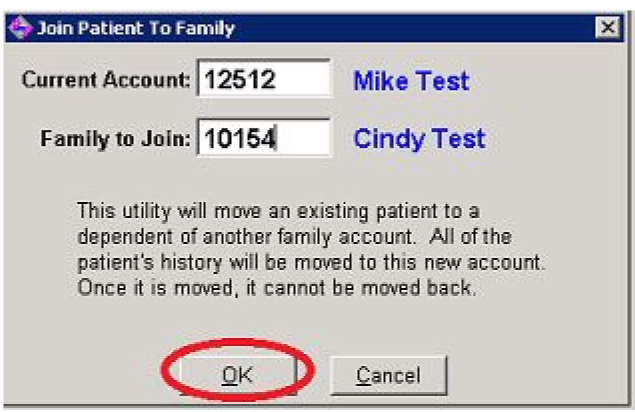
A search for Separated Patient will now bring up the new account number and list him as the responsible party.

Joining a Patient to an Account

Find account #'s of joining patient and of family account. Joining patient's account will no longer be available after joining family account.

From toolbar choose Tools, Account Utilities, **Join Patient to Family.**

Enter joining patient account # in **Current Account** field. Enter family account # in **Family to Join** field.
*Please note warning!
OK

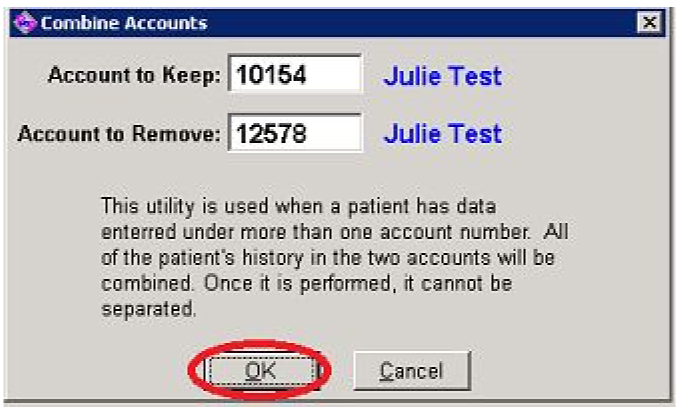


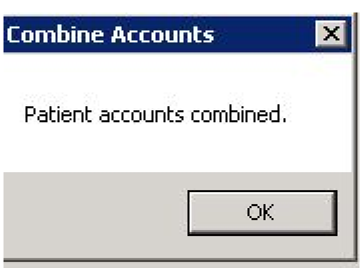
Merging Accounts

Information on the two individual accounts to be merged must match. Name, birthdate and SS# must match exactly. One account can not have a SS# when the other one does.

From toolbar choose Tools, Account Utilities, **Combine Accounts.**

Enter account information in corresponding fields.
Please note warning!
OK.





Using/Searching for Family Account #'s

To open the correct family member's chart on both the clinical side and patient activity side, the **family account # plus the suffix** must be used. **If only the account # is used, patient 00** will open.

In the example above, entering Account #10154-04 brings up Danielle Test's chart.

Entering only #10154 with no suffix would bring up Dan Test's chart.

The same applies on the **Patient Activity** side. You must enter **Family account # with suffix** to bring up correct patient. You may also still **search by first and last name** of patient or bring up Family Account and search for correct patient in **Family Members** section. Click on correct patient to bring up their information.