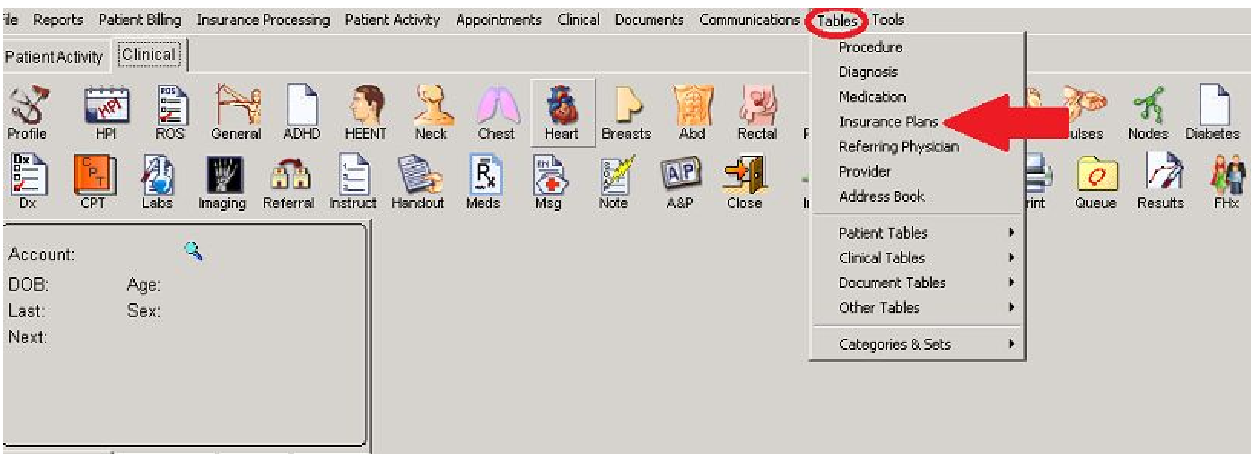
Employer Portal Registration

Process Overview:

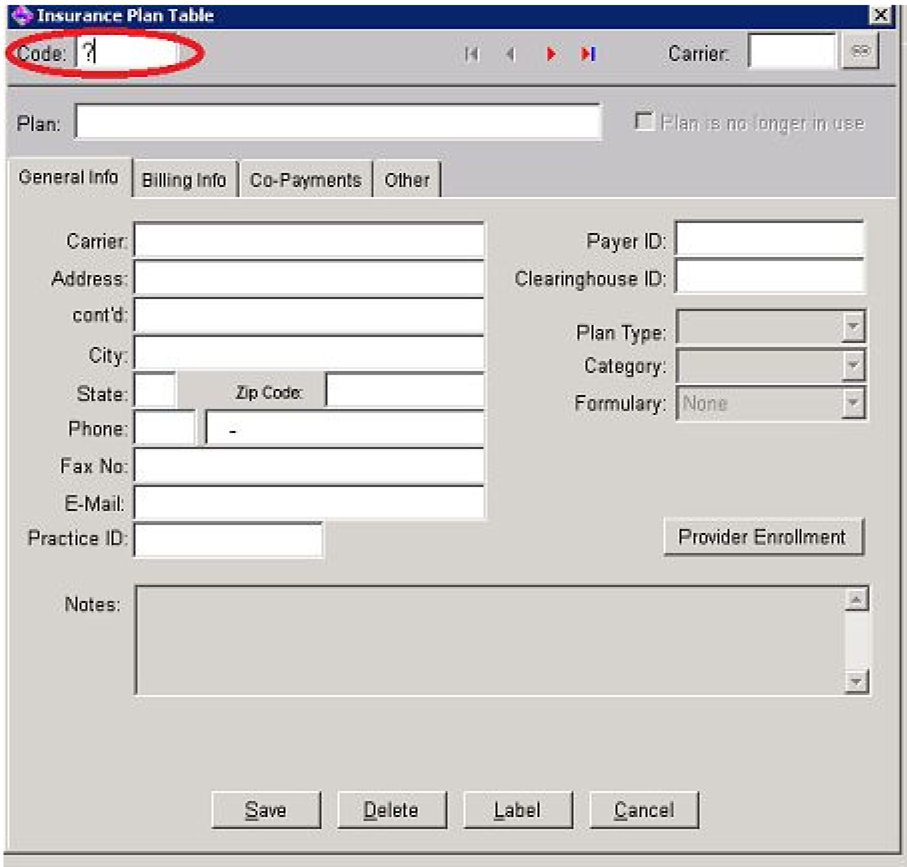
Enter employer in Insurance Plan Table
Enter employer in Address Book
Link employer to patient
Link Insurance Plan to patient

<u>Enter employer in Insurance Plan Table</u>

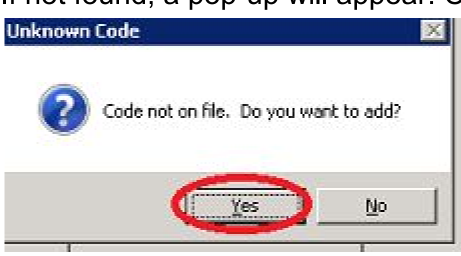
From the Clinical screen, choose Tables, Insurance Plans.



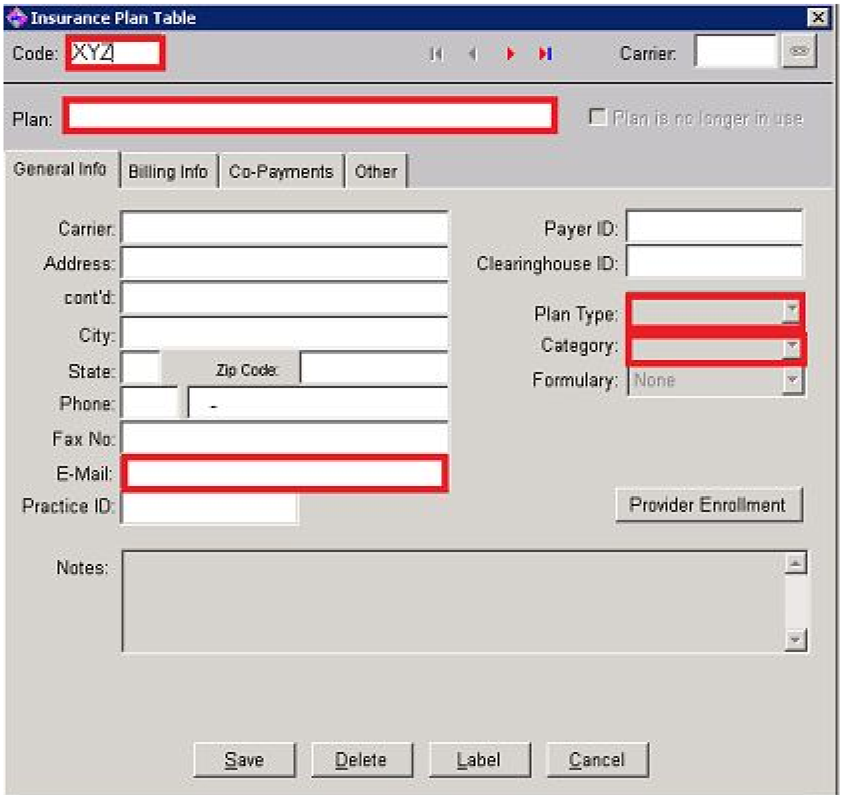
From the **Insurance Plan Table**, search the code field to make sure employer is not already entered. Search alphabetically or by entering a question mark. Enter.



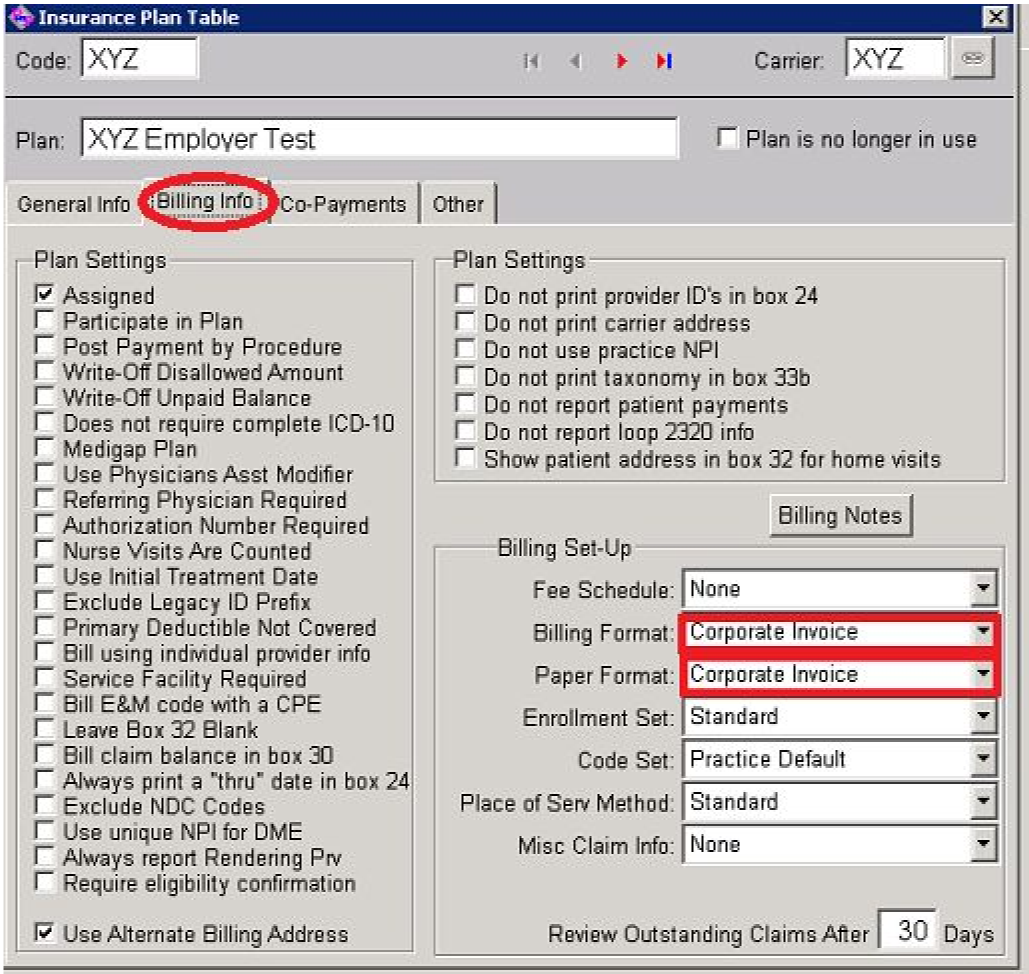
If not found, a pop-up will appear: Code not on file found. Do you want to add? Yes.



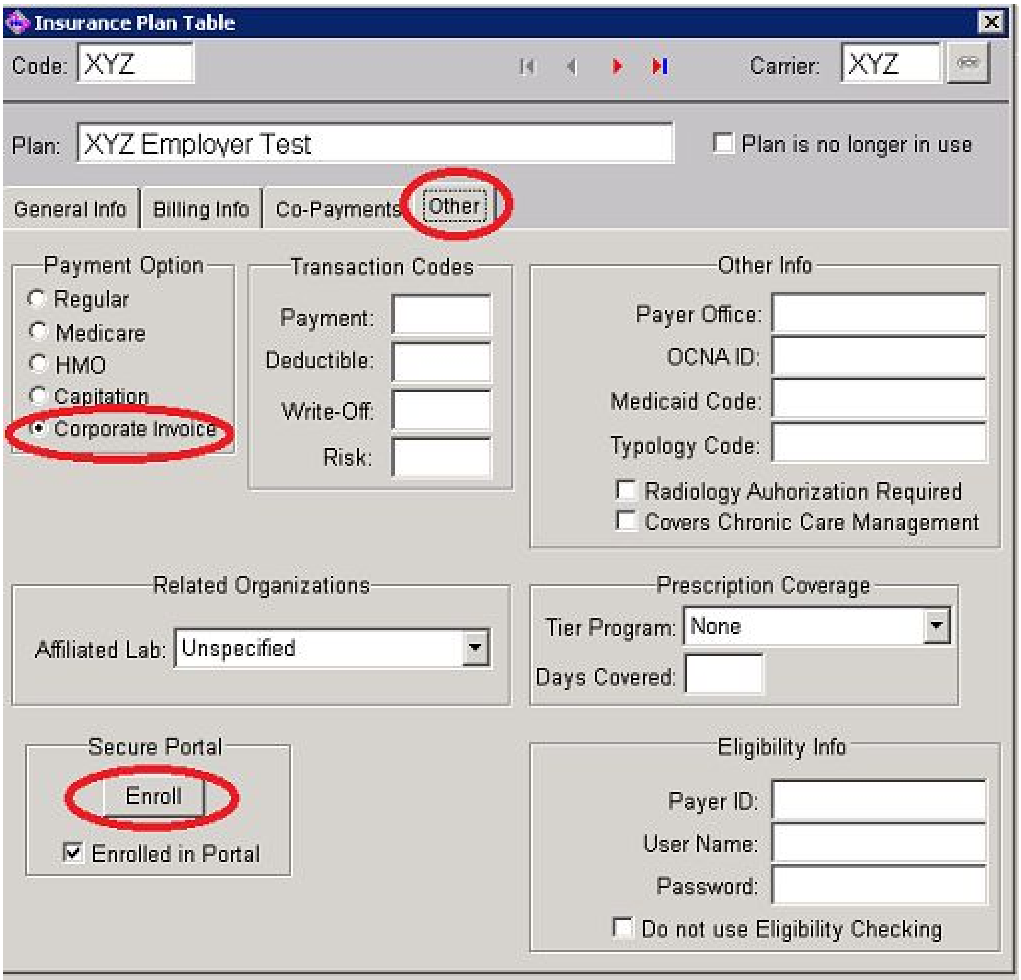
Enter **Code** you would like to use for Employer in that field. Tab through to **Plan** field and enter full name of employer. On the **General Info** tab, fill in employer information. You must **enter email address**. Change **Plan Type** to Corporate. This will also change **Category** field to Corporate.



Click on **Billing Info** tab. Change both **Billing Forma**t and **Paper Format** to Corporate Invoice.



Click on **Other** tab. Under **Payment Option**, choose Corporate Invoice. **Enroll**.

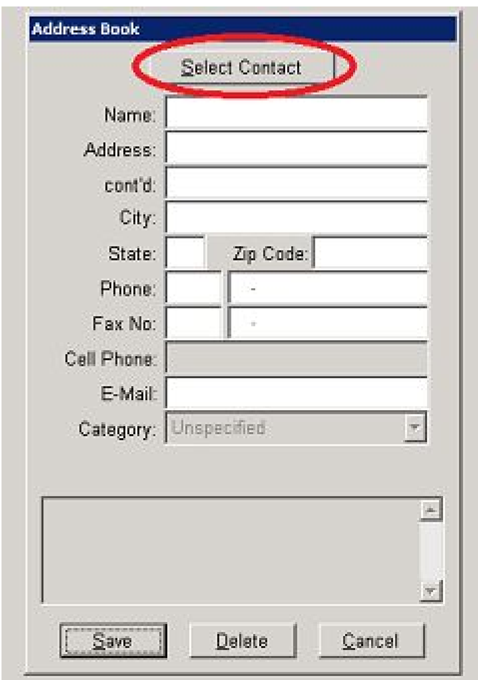


Print **Secure Portal Information form**. Mail to the employer.

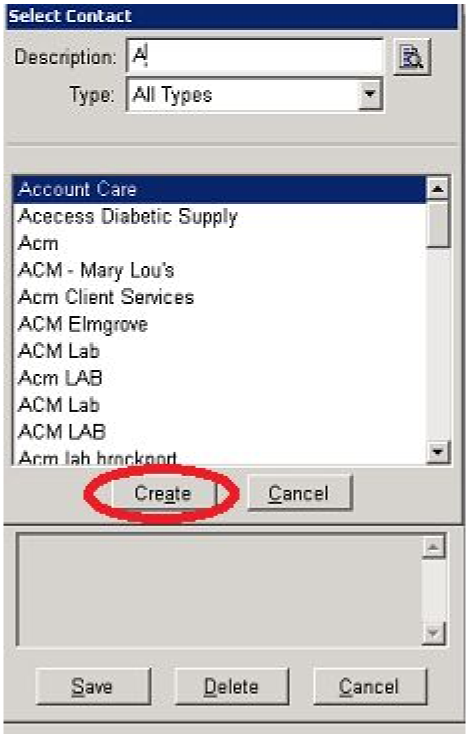
Enter Employer in Address Book

Choose **Tables**, **Address Book**.

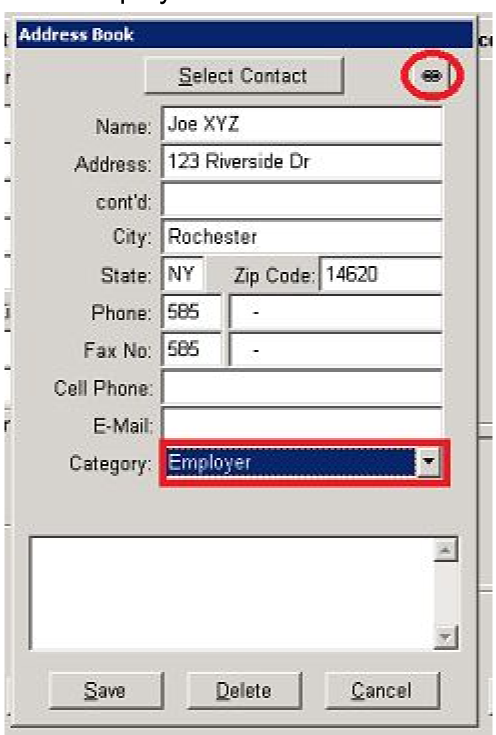
Select Contact.



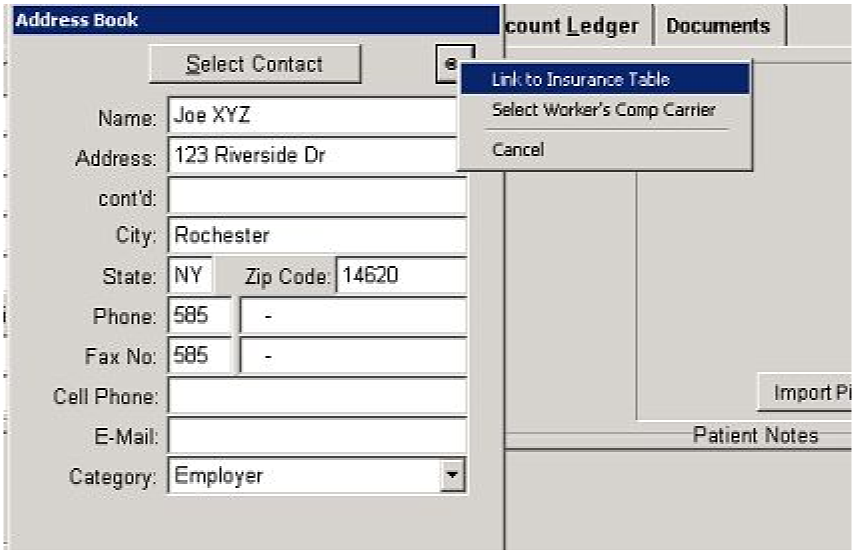
Search to make sure Employer is not already in Address Book. If not found, click **Create**.



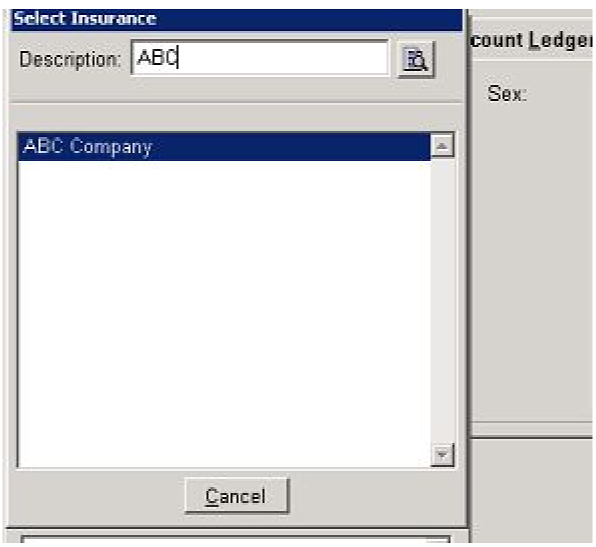
Enter employer name and information. Change **Category** to Employer. Click on **Link** icon.



Choose **Link to Insurance Table**.

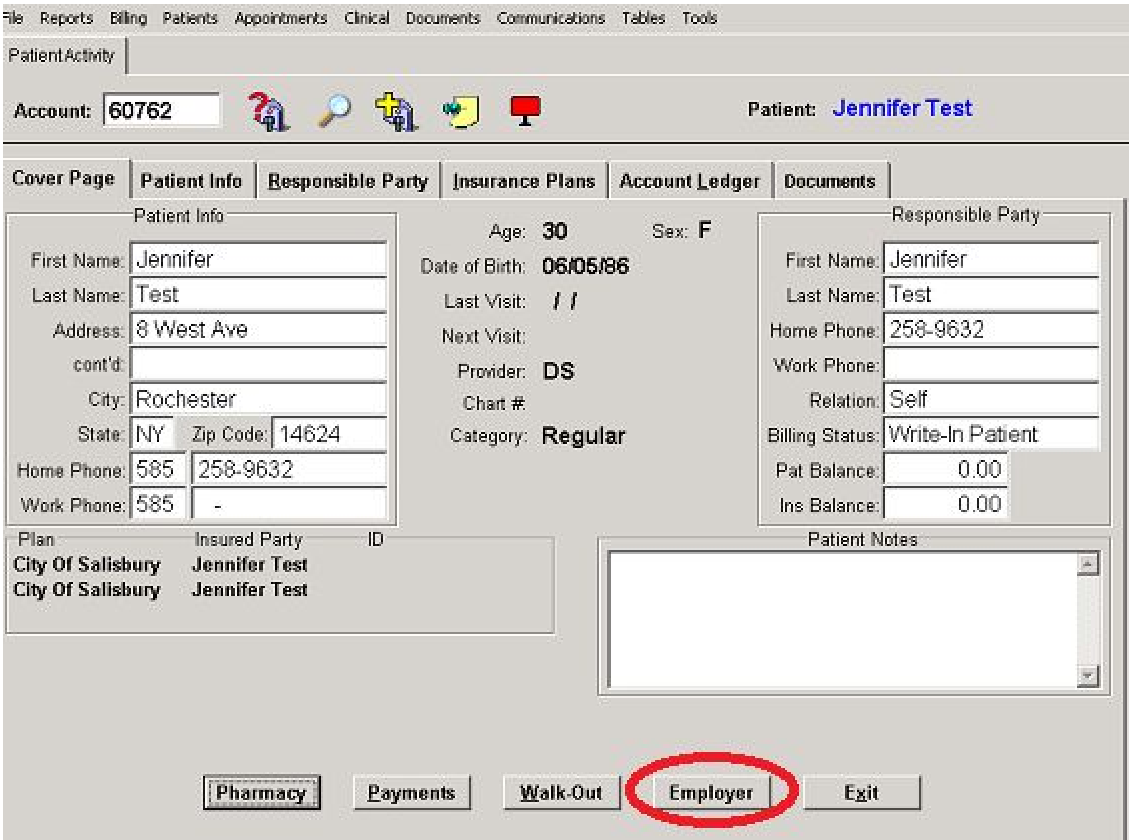


From **Select Insurance** window, search for company you previously added in Step 1. Click on it. **Save.**

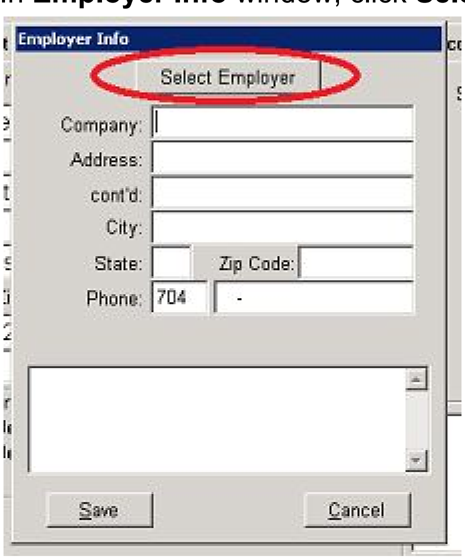


Link Employer to Patient

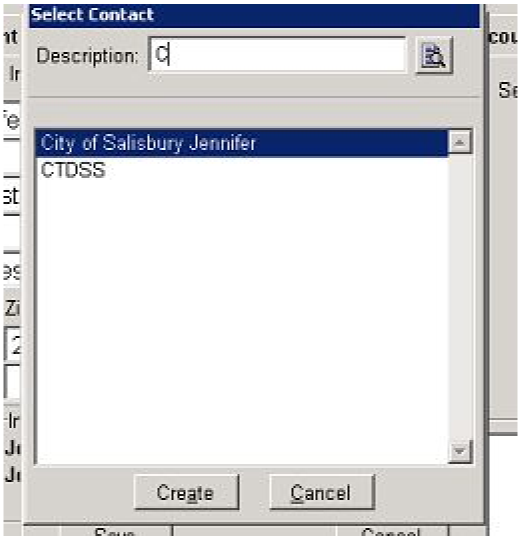
From **Patient Activity** screen, click on **Employer**.



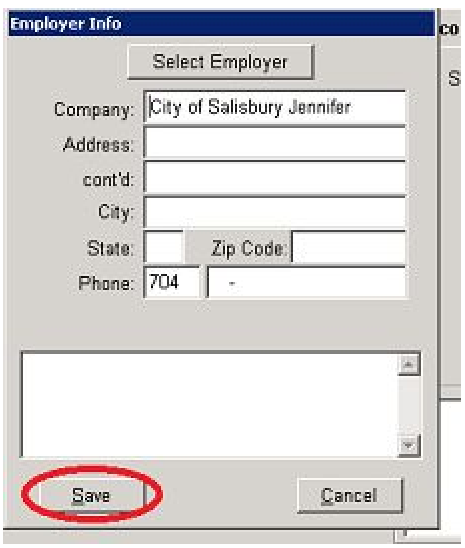
In **Employer Info** window, click **Select Employer**.



Search in **Description** field for employer. Click on correct one.

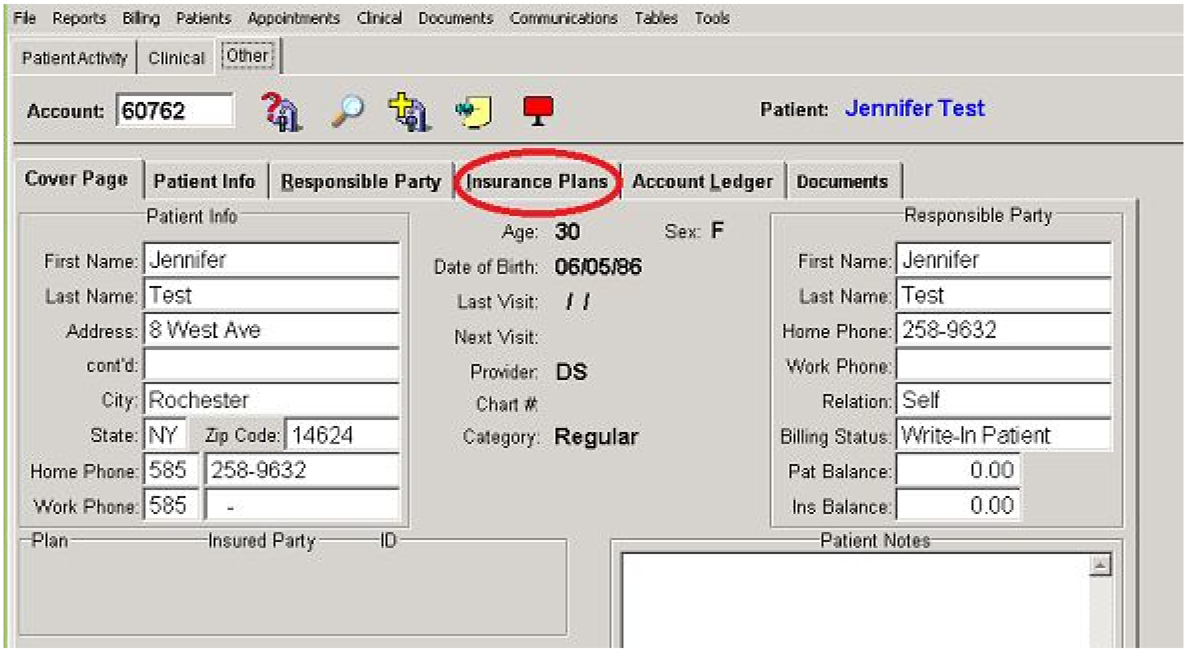


Save.

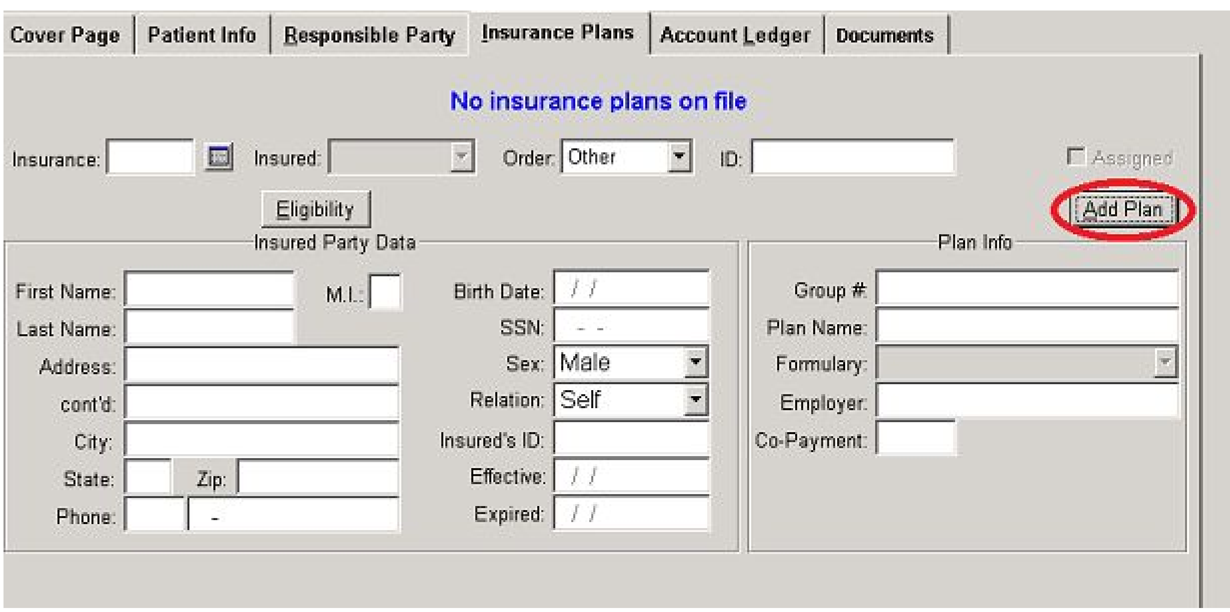


Link Insurance Plan to Patient

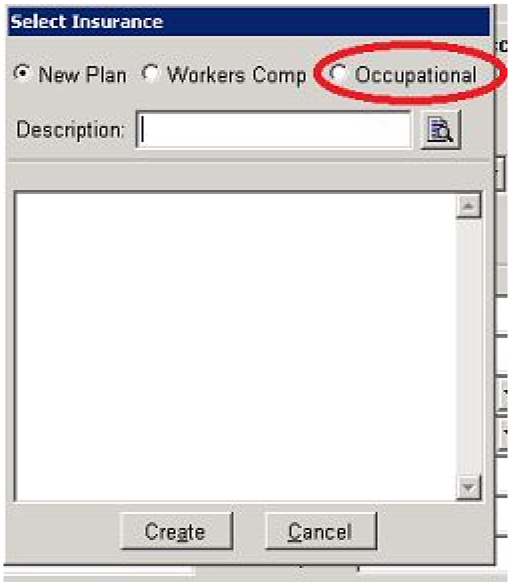
From **Patient Activity** screen, locate patient. Click on **Insurance Plans** tab.



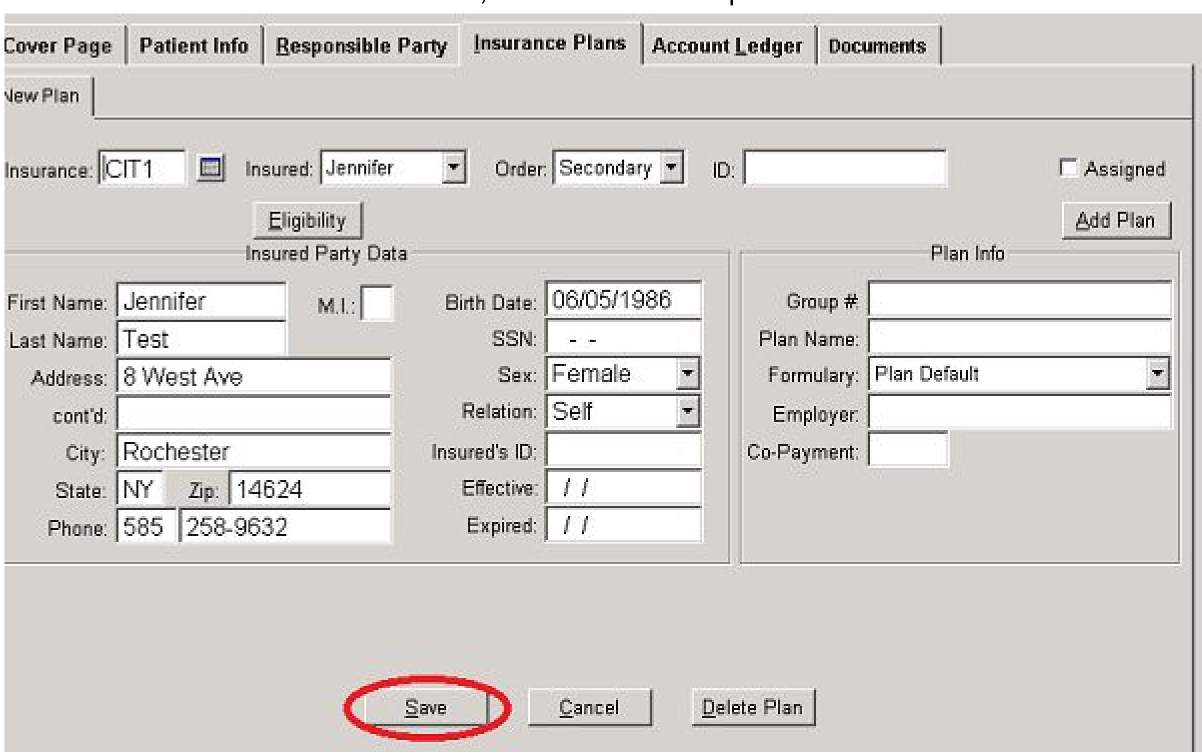
Click **Add Plan**.



Click **Occupational**. Because insurance has been linked, correct insurance plan will auto-fill. *Note: Follow same steps to link Workers Comp to a patient. Just choose Workers Comp instead of Occupational.



Because insurance has been linked, correct insurance plan will auto-fill.



Employer is now registered in Employer Portal.