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Key features about this user guide:

This user guide addresses how to enter Insurance information in the Health Management System.

Wide outside margins are provided for taking notes. Margins may also contain a relevant TIP about a task discussed on that page.

At the end of each section, a space is available for you to enter your local notes. You can enter your notes electronically or write them in a printed copy. Use this section to reference internal operating procedures or information unique to your CHD that would better explain how to use a particular feature or function. If you choose to use this section, please inform CHD staff to reference this section.

Bookmarks, along with page numbers, are provided for you to quickly reference another section of text within the document. Press [Ctrl] then click the hyperlink to go to the bookmarked text.

“Steps to” gives you step-by-step instructions to accomplish a task or function within HMS. Short sentences using verbs and objects are used in the steps. Asterisk (*) appearing at the left of the step indicate the step is optional and not required to complete the task.

Standard language is used to perform a task.
- Click button; e.g., Click Search.
- Press a key or key combination is shown in square brackets; e.g., Press [Enter] or Press [Ctrl+Alt+Delete].

The result of the action may appear after a step. Often a step may be done more than one way. Options follow the text “Do one of the following:” so you can choose the best way for you.

A NOTE supplies additional information pertinent to a particular step or action.

A TIP gives a shortcut or additional information referring to a task or step on that page and appears in the outside margin of the page.

Supplemental information or examples may be included in the Appendixes.

Getting Help

Please let us know how we can make our training materials more helpful to you. Email your questions, suggestions, or HMS training needs to dhmstrainingteam@flhealth.gov. You can also email us if you need help with HMS.
Section 1: General Information

Introduction

Entry of the client’s insurance information into the Health Management System (HMS) should be completed for all clients that have coverage.

This section addresses how to access the Insurance screen and the different fields on this screen.
Accessing the Client Insurance Page

The Client Insurance page is accessible from the legacy Billing module, Billing Portal and Client Information module. After selecting a client, you can access the page from any of these locations.
**Steps to Access Update Client Insurance Page**

1. Select HMS client.
2. Click one of the following:
   a. **Insurance** via the Legacy Billing module.
   b. **Add** via the Insurance tab within the Billing Portal.
   c. **Insurance** via the Client Information page.

**Exploring the Client Insurance Page**

The Client Insurance page allows you to enter First, Second, Medicaid and Other insurance information for the client. You can also verify insurance and suggest eligibility.

The Client Insurance page displays the client’s current insurance information including the insurance type, insurance company, coverage start and end dates, billing type, policy number, CRA/Sub-CRA number, last eligibility verification date, available eligibility forms and an option to verify eligibility.

Command buttons on the top right corner of the page allow you to add, delete or print insurance information. Clicking the X exits the Client Insurance page and returns to the previous page.
<table>
<thead>
<tr>
<th>Page No</th>
<th>Topic Heading</th>
<th>Note(s)</th>
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</tr>
</tbody>
</table>
Section 2: Entering Non-Medicaid Insurance Information

Introduction

Within HMS, insurances are categorized as First, Second and Other.

This section addresses how to access insurance categories, and how to add and update insurance information for First, Second and Other type insurance.

This section also addresses how to access and enter insurance authorizations.
Entering Non-Medicaid Insurance Information

**Adding Insurance Information**

To add insurance information for the client, click the blue plus (+) button from the top right corner of the Client Insurance page. The Add Insurance window displays.

![Add Insurance Window](image)

The Add Insurance window allows you to select the insurance type. Select an insurance from the **Insurance Type** drop down and click the green check. The Insurance Details page displays.

![Client Insurance](image)

The Insurance Detail page is divided into two components; Insurance Detail and Policy Holder. This allows you to enter medical and dental insurance information for a client.

**Entering Insurance Detail Information**

The Insurance Detail component contains fields related to the insurance company.

![Client Information: Insurance Detail Component](image)

The table below describes available fields in the Insurance Detail component:

<table>
<thead>
<tr>
<th>Field/Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**Entering Non-Medicaid Insurance Information**

<table>
<thead>
<tr>
<th>Company</th>
<th><strong>Required.</strong> Name of the Insurance Company.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Authorization Indicator</td>
<td>Checkbox that activates the Authorizations button. For more information on authorizations, see <a href="#">Entering Authorization Information</a>.</td>
</tr>
<tr>
<td>Policy Number</td>
<td><strong>Required.</strong> Policy number assigned by the insurance company.</td>
</tr>
<tr>
<td>Group Number</td>
<td>Policy holder group number.</td>
</tr>
<tr>
<td>Insurance Source – RW Clients Only</td>
<td>Source of insurance for HIV Ryan White clients. Options include: Private- Individual, Private- Employer, VA Other Military, Indian Health Services (IHS), Medicaid HMO and Medicare HMO.</td>
</tr>
<tr>
<td>Start Date</td>
<td><strong>Required.</strong> Insurance coverage start date. Type a date (dd/mm/yyyy) or click the calendar icon to select a date.</td>
</tr>
<tr>
<td>End Date</td>
<td>Insurance coverage end date. Type a date (dd/mm/yyyy) or click the calendar icon to select a date.</td>
</tr>
<tr>
<td>App Pending Status</td>
<td>Indicates whether the application status has been filed, declined or expired.</td>
</tr>
<tr>
<td>App Expiration</td>
<td>Date the application expired. Type a date (dd/mm/yyyy) or click the calendar icon to select a date.</td>
</tr>
<tr>
<td>Co-Insurance</td>
<td>Percentage the policy holder must pay based on the insurance policy.</td>
</tr>
<tr>
<td>Copay</td>
<td>Indicates the payment defined in the insurance policy and paid by the insured person each time a medical service is accessed. Allows a dollar amount of $0.01 - $100.00 to be entered.</td>
</tr>
</tbody>
</table>

**Entering Policy Holder Information**

The Policy Holder component allows you to enter the policy holder’s insurance information, date of birth, demographics, and the client’s address.

Select the policy holder from the required Policy Holder drop down or use the Search Policy Holder button to use the client search feature. The selected policy holders information populates.

**NOTE:** To add a new financial member, users must navigate to the Family Financial page.
## Entering Non-Medicaid Insurance Information

### Client Insurance: Policy Holder Component

The table below describes available fields in the Policy Holder component:

<table>
<thead>
<tr>
<th>Field/Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Policy Holder</td>
<td><strong>Required.</strong> Menu displaying the client and/or family member(s) for whom the insurance policy is listed under. Selecting a client from the drop down automatically populates the remaining policy holder fields.</td>
</tr>
<tr>
<td>Search Policy Holder</td>
<td>Searches the HMS database for an existing client to add as a policy holder.</td>
</tr>
<tr>
<td>Remove Policy Holder</td>
<td>Clears the policy holder fields from the policy holder component.</td>
</tr>
<tr>
<td>Last Name</td>
<td>Last name of the policy holder.</td>
</tr>
<tr>
<td>First Name</td>
<td>First name of the policy holder.</td>
</tr>
<tr>
<td>Middle Name</td>
<td>Middle name of the policy holder.</td>
</tr>
<tr>
<td>Suffix</td>
<td>Name suffix, if any, of the policy holder.</td>
</tr>
<tr>
<td>DOB</td>
<td>Date of birth of the policy holder. Type a date (dd/mm/yyyy) or click the calendar icon to select a date.</td>
</tr>
<tr>
<td>Gender</td>
<td>Gender of the policy holder.</td>
</tr>
</tbody>
</table>
Client Relationship to Policy Holder | **Required.** Drop down to indicate the client relationship to the policy holder. Options include: Spouse, Child and Other.

Use Client’s Mailing Address | Checkbox to indicated whether to use the client’s mailing address. If selected, the address fields automatically populate with the client’s address enter on the demographics page.

Address 1 | Address of the policy holder.

Zip | Zip code of the policy holder.

Ext | Zip code extension of the policy holder.

City | City of the policy holder.

State | State of the policy holder.

---

**Searching for a Policy Holder**

Clicking the **Search Policy Holder** button displays the HMS Client Search screen.

**Client Search**

Name: 
SSN: 
Family ID: 
DOB: 
MRN: 

---

**Search Policy Holder - Client Search**

You have the option to search by Name [(Last,First) or partial name], Social Security Number, Family ID, Date of Birth and Medical Record Number. Click the **search** button and the client displays in the search list.

**Client Search**

Name: pan
SSN: 
Family ID: 
DOB: 10/13/1986
MRN: 

**Found 1 Clients.**

<table>
<thead>
<tr>
<th>Name</th>
<th>SSN</th>
<th>Family ID</th>
<th>DOB</th>
<th>MRN</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAN, PETER</td>
<td>PXP-10-1386</td>
<td></td>
<td>10/13/1986</td>
<td></td>
<td>NON-CLIENT</td>
</tr>
</tbody>
</table>

**Policy Holder Component - Search Policy Holder**
Selecting the client from the list automatically populates the Policy Holder component.

Client Insurance: Policy Holder Component

- Click the **save** button to save the policy holders information.

Removing a Policy Holder

- Clicking the **Remove Policy Holder** button clears any client information from the Policy Holder fields.

- Once information has been removed, click the **save** button to save the changes.

Entering Comments

- Comments can be entered in the **Update Comments** text box. This is a free-text field with a max length of 250 characters.

- Once all information has been entered, click the green **Save** button in the top right corner of the page.

Steps to add insurance information

**NOTE**: An asterisk (*) indicates the step is required.

1. **Access** Client Insurance page.
2. **Click** blue plus (+) button
3. **Select** one of the following from the **Insurance Type** drop down:
   a. **First**.
   b. **Second**.
   c. **Medicaid**.
   d. **Other**.
4. **Click** green check button.
5. **Enter** or select the following **Insurance Detail** information:
   a. **Company**.
   b. **Authorization Indicator**.
c. *Policy Number.
d. Group Number.
e. Insurance Source – RW Clients Only.
f. *Start Date.
g. End Date.
h. App Pending Status.
i. App Expiration.
j. Co Insurance.
k. Copay.

6. Enter or select the following Policy Holder information:
   b. Last Name.
   c. First Name.
   d. Middle Name.
   e. Suffix.
   f. DOB.
   g. Gender.
   h. *Client Relationship to Policy Holder.
   i. Use Client’s Mailing Address.
   j. Address Line 1.
   k. Zip.
   l. Ext.
   m. City.
   n. State.

7. Click Search Policy Holder button.
8. Click Remove Policy Holder
9. Type comments in the Update Comments text box.
10. Click Save.

**Updating Current Insurance Information**

To update the client’s insurance information, highlight and select the insurance row from the Client Insurance page. The Insurance Details page displays.
Entering Non-Medicaid Insurance Information

Client Insurance Details

All insurance detail information can be updated as needed. Comments are required when making corrections to insurance information. Enter comments into the Update Comments field.

Once all information has been entered, click the green Save button in the top right corner of the page.

Steps to update insurance information

1. Access Client Insurance page.
2. Select insurance from the insurance list.
3. Modify information as needed.
4. Type comments in the Update Comments text box.
5. Click Save.

Entering Authorizations Information

You can update, copy and add new authorizations from the Authorization Search page. To access, click the blue Auth button located in the top right corner of the Insurance Detail page. The Authorization Search page displays.

NOTE: The Authorization button displays when the Authorization Indicator checkbox is selected and appears after insurance information has been saved.
Authorization Search Page

The Authorization Search page displays any current authorizations in the results list. You can search for an insurance type by selecting an insurance from the Authorization Insurance drop down list or by clicking the Search button.

Selecting an authorization from the results list enables the Update and Copy Auth buttons. To update an existing authorization, click the Update Auth button.

The Copy Auth button allows you to copy an existing authorization and modify existing information. **NOTE:** The copy function creates an additional authorization for the insurance company.

To add a new authorization to the client’s existing insurance information, click the New Auth button. The Authorization Details page displays.

Authorization Details Page

The table below describes available fields on the Authorization Details page:

<table>
<thead>
<tr>
<th>Field/Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provider Name</td>
<td><strong>Required.</strong> Name of the Insurance Company. Max limit of 45 characters.</td>
</tr>
<tr>
<td>Authorization Insurance</td>
<td>Display only field that indicates the Authorizing Insurance company.</td>
</tr>
<tr>
<td>Authorization #</td>
<td><strong>Required.</strong> Authorization Number which includes alphanumeric and special characters. Max limit of 25 characters.</td>
</tr>
<tr>
<td>Phone</td>
<td><strong>Required.</strong> Phone number for the provider.</td>
</tr>
</tbody>
</table>
Entering Non-Medicaid Insurance Information

<table>
<thead>
<tr>
<th>Start Date</th>
<th><strong>Required.</strong> Date in which the authorization is valid for service provision. Must be within the date range of the insurance.</th>
</tr>
</thead>
<tbody>
<tr>
<td>End Date</td>
<td>Date in which the authorization will expire for service provision. Must be within the date range of the insurance.</td>
</tr>
<tr>
<td>Contact Person</td>
<td><strong>Required.</strong> Name of the contact person.</td>
</tr>
<tr>
<td>Comments</td>
<td><strong>Required.</strong> Free text field allowing authorization detail information. Max of 250 characters.</td>
</tr>
</tbody>
</table>

Once all information has been entered, click the green **Save Page** button in the top right corner of the page.

**Steps to add Authorization information**

1. Access existing insurance from the Client Insurance page.
2. Click blue **Auth** button.
3. Click **New Auth** to create a new insurance authorization.
4. Type the following authorization detail information:
   a. **Provider Name**.
   b. **Authorization #**.
   c. **Phone**.
   d. **Start Date**.
   e. **End Date**.
   f. **Contact Person**.
   g. **Comments**.
5. Click **Save Page**.

**Adding Historical Insurance Information**

To add historic insurance information, click the blue plus (+) button from the top right corner of the Client Insurance page. The Add Insurance window displays.
The Add Insurance window allows you to indicate a historical insurance type. To enter historical insurance information, the client must have existing information documented.

Select the **Historic Coverage** checkbox, the type of historic insurance from the **Insurance Type** drop down and click the green check. The Insurance Details page displays.

**Client Insurance Details**

Enter insurance information in the corresponding Insurance Detail and Policy Holder components. Historic insurance information must include an end date.

- Once all information has been entered, click the green **Save** button in the top right corner of the page.

Historical insurance information displays on the Update Ins Co/Alt Payor page.

**Update Ins Co/Alt Payor Page**

To access the client’s historical address list, click the blue **Update Insurance History** button. The Update Ins Co/Alt Payor page displays.
Entering Non-Medicaid Insurance Information

Update Ins Co/Alt Payor Page

Updating Insurance History

To update insurance history, highlight and select the record. The Update Insurance Information window displays below the historical list.

Verify and make insurance updates as needed. Click on the green **Save Page** button to save the changes.

Steps to add historical insurance information

1. Access **Client Insurance** page.
2. Click **blue plus (+) button**
3. Select **Historic Coverage** checkbox.
4. Select one of the following from the **Insurance Type** drop down:
   e. **First**.
   f. **Second**.
   g. **Medicaid**.
   h. **Other**.
5. Click **green check button**.
6. Enter insurance information in the corresponding fields.
7. Click **Save**.
Step to access Update Ins Co/Alt Payor Page

- Click **Update Insurance History**.

Steps to update historical insurance information

1. Access Client Insurance page.
2. Click **Update Insurance History**.
3. Select insurance from the Historical Insurance results list.
4. Modify insurance information in the corresponding fields.
5. Click **Save**.
## Local Notes Section

<table>
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<th>Page No</th>
<th>Title Heading</th>
<th>Notes</th>
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</tbody>
</table>
Section 3: Entering Medicaid Insurance

Introduction

This section addresses how to access the Medicaid insurance option, explores the fields on the page and how to add or update information.
Entering Medicaid Insurance Information

To add Medicaid information, click the plus (+) button in the top right corner of Client Insurance page. The Add Insurance window displays.

Select Medicaid from Insurance Type dropdown and click the green check button. The Medicaid Insurance Detail page displays.

**NOTE:** To add new insurance information, the current Medicaid information must have an end date.

The Medicaid Details page includes 9 data fields and one comment box. Certain fields are required based on the selection of other fields. Required fields are denoted by a red star.

The table below describes available fields on the Medicaid Details page:

<table>
<thead>
<tr>
<th>Field/Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medicaid Number</td>
<td>Required. 10-digit number assigned to the client by Medicaid.</td>
</tr>
<tr>
<td>Medipass Ind</td>
<td>Indicate if the Medicaid type is Medipass Ind. The HMO Ind checkbox disables when this box is selected. The Authorization button displays when this box is selected, but is not required.</td>
</tr>
<tr>
<td>HMO Ind</td>
<td>Checkbox to indicate the Medicaid type is an HMO. The Medipass Ind checkbox is disabled when this box is selected. The Authorization button displays when this box is selected, but is not required.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Medicaid Start</td>
<td>Required. Medicaid Eligibility start date. Date must be prior to the earliest service date.</td>
</tr>
<tr>
<td>Medicaid End</td>
<td>Medicaid Eligibility end date.</td>
</tr>
<tr>
<td>Insurance Source - RW Clients Only</td>
<td>Source of insurance for HIV Ryan White clients. Options include: Private- Individual, Private- Employer, VA Other Military, Indian Health Services (IHS), Medicaid HMO and Medicare HMO.</td>
</tr>
<tr>
<td>App. Expiration Date</td>
<td>Medicaid application expiration date. NOTE: Date is required if App. Pending Status field is populated.</td>
</tr>
<tr>
<td>Medicaid Type</td>
<td>Listing of Medicaid types from FIMMIS.</td>
</tr>
<tr>
<td>Update Comments</td>
<td>Required if completing a correction to the insurance information.</td>
</tr>
</tbody>
</table>

**Steps to enter Medicaid Insurance Information**

1. Access The Update Ins Co/Alt Payor page.
2. Select Medicaid from the results list.
3. Select one of the following:
   a. Correction to Current Insurance.
   b. Add a new Insurance Coverage.
   c. Add a Historic Coverage.
4. Enter Medicaid information into the applicable fields.
5. Click Save Page.
### Local Notes Section

<table>
<thead>
<tr>
<th>Page No</th>
<th>Topic Heading</th>
<th>Note(s)</th>
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</tbody>
</table>
Section 4: Working with Eligibility

Entering Medicaid Insurance

This section addresses how to view client eligibility forms, as well as verify and suggest eligibility.
Viewing Eligibility Forms

The 271, AAA, 999 and TA1 error reports can be viewed by clicking the corresponding buttons from the View Elig. column of the Client Insurance page.

The Eligibility, Coverage or Benefit Information Report (271) displays payer, policy, dependent, and benefits and coverage information along with whether errors were returned.

271 Form

The Eligibility, Coverage or Benefit Information Report – 271 with AAA Errors report displays payer information, the error rejection reason and follow-up action.
Entering Medicaid Insurance Information

The **Interchange Acknowledge Report (999)** displays errors and pinpoints the Electronic Data Interchange (EDI) location error example: IK3 or IK4.

<table>
<thead>
<tr>
<th>Payer Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payer Name:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Error Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>999 IK3 Error Identification</td>
</tr>
<tr>
<td>Segment ID Code</td>
</tr>
<tr>
<td>NM1</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>999 IK4 Error Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position in segment</td>
</tr>
<tr>
<td>9</td>
</tr>
</tbody>
</table>

**999 Form**

The **TA1** error report is returned when the login credentials in the background have expired for Change Healthcare. If you receive this error, contact [DL HMS Support](#).

**Steps to view eligibility forms**

1. Access Client Insurance page.
2. Select forms button from **View Elig** column.

**Verifying Eligibility**

To verify eligibility, click the **Verify** button from the Client Insurance page. The Eligibility Service Type Code window displays.

**Eligibility Service Type Code Screen**

The Eligibility Service Type Code window includes the ability to select an eligibility service type and service date.
The payer uses the eligibility service type code to determine what kind of service(s) the client is eligible for. Select a code from the **Eligibility Service Type Code** drop down.

The **Service Date** indicates the date for which real-time eligibility verification is being performed. Type a date to click the calendar icon to select a date.

**NOTE**: A future date cannot be used for the Service Date.

Click **Transmit Eligibility Request** to submit the eligibility request based on the service code and date selected. The Eligibility, Coverage or Benefit Information Report displays.

---

### Health Management System

**Eligibility, Coverage or Benefit Information Report**

```
BROWNING, LINDSAY T
DOB: 05/03/1991
State ID: 52-86497692
Medical Record: 119701
```

**Payer Information**

- **Payer Name**: AMERIGROUP
- **Plan Coverage Dates**: 02/01/2018 - 12/31/2018

**Coverage**: Active

**Plan**: See Benefits and Coverage Information Section

**Policy Holder Information**

- **Policy Holder**: BROWNING, LINDSAY T
- **Member ID**: 717387047
- **DOB**: 05/03/1991
- **Gender**: Female
- **Address**: PO BOX 16732
- **City**: CLEARWATER
- **State**: FL
- **Zip**: 33765-8732

**Plan Number**: FLTANF000; FL MMA TANF
**Group Number**: FLMC000; FLORIDA MEDICAID
**Case Number**: FLBA020

---

### Steps to verify eligibility

1. Access **Client Insurance page**.
2. Click **Verify** from the View Elig column.
3. Select service code from the **Service Type Code** drop down.
4. Do one of the following for the **Service Date**:
   a. Type date.
   b. Select calendar icon to select a date.
5. Click **Transmit Eligibility Request**.

---

### Suggesting Client Eligibility

To suggest client eligibility, click on the blue **Suggest Eligibility** button from the Client Insurance page. The Suggested Client Eligibilities window displays.
The Suggested Client Eligibilities page displays the client's eligibility status, insurance company, eligibility description and billable information.

The view drop down allows you to select which types of records to display in the Eligibilities list. Select All, Eligible or Not Eligible from the View drop down.

By click on the record the Client Insurance Page displays to make changes.

Clicking the (X) icon closes the page.

Steps to suggest client eligibilities

1. Access Client Insurance page.
2. Click Suggest Eligibility.
3. Select record type from the View drop down.
4. Select record from the results list.
<table>
<thead>
<tr>
<th>Page No</th>
<th>Topic Heading</th>
<th>Note(s)</th>
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Appendix A: Summary of Steps

✓ Section 1: General Information

Steps to Access Update Ins Co/Alt Payor Page
1. Select HMS Client.
2. Click one of the following:
   a. *Insurance* via the Legacy Billing module.
   b. *Add* via the Insurance tab within the Billing Portal.
   c. *Insurance* via the Client Info page.

✓ Section 2: Entering Non-Medicaid Insurance Information

Steps to add insurance information

NOTE: An asterisk (*) indicates the step is required.
1. Access Client Insurance page.
2. Click blue plus (+) button
3. Select one of the following from the Insurance Type drop down:
   a. *First.*
   b. *Second.*
   c. *Medicaid.*
   d. *Other.*
4. Click green check button.
5. Enter or select the following Insurance Detail information:
   a. *Company.*
   b. Authorization Indicator.
   c. *Policy Number.*
   d. Group Number.
   e. Insurance Source – RW Clients Only.
   f. *Start Date.*
   g. End Date.
   h. App Pending Status.
   i. App Expiration.
Summary of Steps

j. Co Insurance.
k. Copay.

6. Enter or select the following Policy Holder information:
   b. Last Name.
   c. First Name.
   d. Middle Name.
   e. Suffix.
   f. DOB.
   g. Gender.
   h. *Client Relationship to Policy Holder.
   i. Use Client’s Mailing Address.
   j. Address Line 1.
   k. Zip.
   l. Ext.
   m. City.
   n. State.

7. Click Search Policy Holder button.
8. Click Remove Policy Holder
9. Type comments in the Update Comments text box.
10. Click Save.

Steps to update insurance information
1. Access Client Insurance page.
2. Select insurance from the insurance list.
3. Modify information as needed.
4. Type comments in the Update Comments text box.
5. Click Save.

Steps to add Authorization information
1. Access existing insurance from the Client Insurance page.
2. Click blue Auth button.
3. Click New Auth to create a new insurance authorization.
4. Type the following authorization detail information:
   a. Provider Name.
   b. Authorization #.
   c. Phone.
Summary of Steps

Steps to add historical insurance information
1. Access Client Insurance page.
2. Click blue plus (+) button
4. Select one of the following from the Insurance Type drop down:
   a. First.
   b. Second.
   c. Medicaid.
   d. Other.
5. Click green check button.
6. Enter insurance information in the corresponding fields.
7. Click Save.

Step to access Update Ins Co/Alt Payor Page
• Click Update Insurance History.

Steps to update historical insurance information
1. Access Client Insurance page.
2. Click Update Insurance History.
3. Select insurance from the Historical Insurance results list.
4. Modify insurance information in the corresponding fields.
5. Click Save.

Section 3: Entering Medicaid Insurance Information

Steps to Enter Medicaid Insurance Information
1. Access The Update Ins Co/Alt Payor page.
2. Select Medicaid from the results list.
3. Select one of the following:
   a. Correction to Current Insurance.
   b. Add a new Insurance Coverage.
c. **Add a Historic Coverage.**

4. Enter Medicaid information into the applicable fields.
5. Click **Save Page.**

✔ **Section 4: Working with Eligibility**

**Steps to view eligibility forms**
1. Access Client Insurance page.
2. Select forms button from **View Elig** column.

**Steps to verify eligibility**
1. Access Client Insurance page.
2. Click **Verify** from the View Elig column.
3. Select service code from the **Service Type Code** drop down.
4. Do one of the following for the **Service Date**:
   a. Type date.
   b. Select calendar icon to select a date.
5. Click **Transmit Eligibility Request.**

**Steps to suggest client eligibilities**
1. Access Client Insurance page.
2. Click **Suggest Eligibility.**
3. Select record type from the **View** drop down.
4. Select record from the results list.