

Insurance Addition to Encounters for Clinical and Clerical Staff

Cerner Revenue Cycle Ambulatory EDUCATION

Insurance must be added to billable encounters in Revenue Cycle. Insurance should be added to the patient perspective before adding the Insurance to an encounter.

Adding Insurance to Encounters

Insurance may be added to new encounters upon creation or to existing encounters.

Note: Insurance should be added to the patient perspective before adding the Insurance to an encounter. For steps on adding Insurance to the patient perspective, see Adding Insurance to Patient Perspective below.

1. Within Revenue Cycle, open the correct patient's chart.
2. Navigate to the Encounters perspective and select the Encounters tab.
3. Insurance information displays if it is associated to the encounter.
4. A new encounter may be created if needed, or an existing encounter modified to add insurance information.

The screenshot shows the 'Encounters' tab in the Cerner interface. A red box highlights the 'Encounters' tab, and another red box highlights the 'Encounter: AT0056128054, 10/10/2022 7:00 AM' header. A third red box highlights the 'Primary Health Plan' and 'Primary Payer' columns in the table below.

Encounter	Facility	Encounter Type	Begin Date	End Date	Resource	Guarantor	Client	Primary Health Plan	Primary Payer
AT0056128054	Munson Family Practice Center	Clinic	10/10/2022 7:00 AM		Lambert DO, Timothy R	AMBCERNED, BARBARA		Medicare Plus Blue	Blue Cross/Blue Shield
AT0056128014	Munson Family Practice Center	InBetween Visits	09/28/2022 12:00 AM		Lambert DO, Timothy R	AMBCERNED, BARBARA			

To add insurance information to a new encounter:

1. Click the blue plus to add a new encounter.

The screenshot shows the 'Encounters' tab in the Cerner interface. A red box highlights the blue plus icon in the top right corner of the tab, indicating where to click to add a new encounter.

2. Fill in the encounter Details, including the correct Encounter Type, Attending Physician and Start Date.

The screenshot shows the 'Add Encounter' form in the Cerner interface. The 'Details' tab is selected. The form contains the following fields:

- Location Details:**
 - Encounter Number: AT
 - Facility: MHC Munson Family Practice Center
 - Building: Munson Family Practice
 - Location: Munson Family Practice
- Encounter Type:** Phone Message Billable
- Confidentiality Level:** Routine
- Medical Service:** (empty)
- Physicians:**
 - Attending Physician: Test MD, Physician
 - Supervising Physician: (empty)
 - Referring Physician: (empty)

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3. Select the Insurance tab.
4. Click Select Profile.

Insurance Summary

Financial Responsibility

+ Add Modify Remove Sequence Insurances **Select Profile** Submit Eligibility Eligibility Details

Seq	Health Plan	Payer	Financial Class	Subscriber	Member Number	Group Number	Begin Date	End Date

5. Select the correct Insurance Profile by checking the box next to the Profile(s).
6. Click OK.

Select the insurance profile that you wish to copy from the patient to this encounter.

Profile	Plan Name	Payer	Financial Class	Subscriber	Member Number	Group Number	Begin Date
<input checked="" type="checkbox"/> Health Professional							
<input checked="" type="checkbox"/> Medicare Plus Blue	Medicare Plus Blue	Blue Cross/Blue Shield	MEDICARE ADVANTAGE	AMBCERNED	111111111111		09/22/2022
<input checked="" type="checkbox"/> Priority Health	Priority Health	Priority Health	PRIORITY HEALTH	AMBCERNED	111111111111		05/15/2023
<input type="checkbox"/> Confidential							
<input type="checkbox"/> Do Not Use Health Insurance Self Pay							
<input type="checkbox"/> Hospital							
<input type="checkbox"/> Liability							
<input type="checkbox"/> Mental Health							
<input type="checkbox"/> Prepay Contract							
<input type="checkbox"/> Self Pay							
<input type="checkbox"/> Veteran's Benefits							

OK Cancel

7. The selected Insurance profile(s) display.
8. Click Save.

Insurance Summary

Financial Responsibility

+ Add Modify Remove Sequence Insurances Change Profile Submit Eligibility Eligibility Details

Seq	Health Plan	Payer	Financial Class	Subscriber	Member Number	Begin Date	End Date	Elig Submitted	Elig Check Status
Health Professional									
1	Medicare Plus Blue	Blue Cross/Blue Shield	MEDICARE ADVANTAGE	AMBCERNED, BARBARA	111111111111	09/22/2022			
2	Priority Health	Priority Health	PRIORITY HEALTH	AMBCERNED, BARBARA	111111111111	05/15/2023			

Save Cancel

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To add insurance information to an existing encounter:

1. Select the correct encounter and double click on the encounter to open the Encounter Details.

Encounter	Facility	Encounter Type	Begin Date	End Date	Resource	Guarantor	Client	Primary Health Plan	Primary Payer
AT0056128054	Munson Family Practice Center	Clinic	10/10/2022 7:00 AM		Lambert DO, Timothy R	AMBCERNED, BARBARA		Medicare Plus Blue	Blue Cross/Blue Shield
AT0056128014	Munson Family Practice Center	InBetween Visits	09/28/2022 12:00 AM		Lambert DO, Timothy R	AMBCERNED, BARBARA			

2. Click the modify (green pencil) icon on the Encounter Details tab.

Modify Encounter

Location Details

Encounter Number: AT0056128054

Facility: Munson Family Practice Cen

Building: Munson Family Practice Cen

Location: Munson Family Practice Cen

Encounter Type: Clinic

Confidentiality Level: Routine

Medical Service:

3. Click the Insurance tab.
4. Click Select Profile to select an insurance to be added to the encounter.
 - a. If no insurance profiles display, the insurance must be added to the patient perspective first.

Insurance Summary

Financial Responsibility

+ Add Modify Remove Sequence Insurances **Select Profile** Submit Eligibility Eligibility Details

Seq	Health Plan	Payer	Financial Class	Subscriber	Member Number	Group Number	Begin Date	End Date	Elig Submitted

5. Select the correct Insurance Profile by checking the box next to the Profile(s).
6. Click OK.

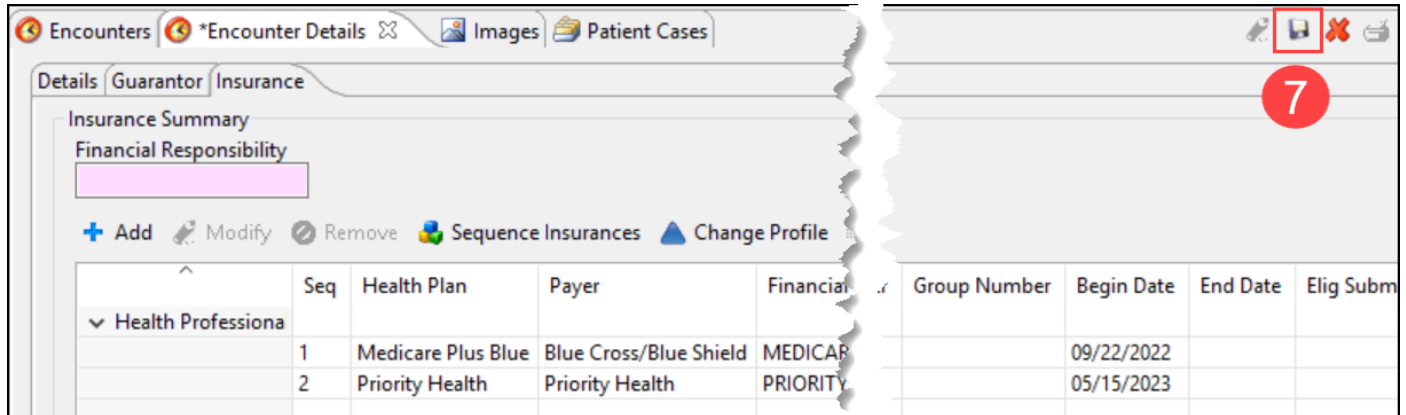
Select the insurance profile that you wish to copy from the patient to this encounter.

Profile	Plan Name	Payer	Financial Class	Subscriber	Member Number	Group Number	Begin Date
<input checked="" type="checkbox"/> Health Professional	Medicare Plus Blue	Blue Cross/Blue Shield	MEDICARE ADVANTAGE	AMBCERNED	111111111111		09/22/2022
<input checked="" type="checkbox"/>	Priority Health	Priority Health	PRIORITY HEALTH	AMBCERNED	111111111111		05/15/2023
<input type="checkbox"/> Confidential							
<input type="checkbox"/> Do Not Use Health Insurance Self Pay							
<input type="checkbox"/> Hospital							
<input type="checkbox"/> Liability							
<input type="checkbox"/> Mental Health							
<input type="checkbox"/> Prepay Contract							
<input type="checkbox"/> Self Pay							
<input type="checkbox"/> Veteran's Benefits							

OK Cancel

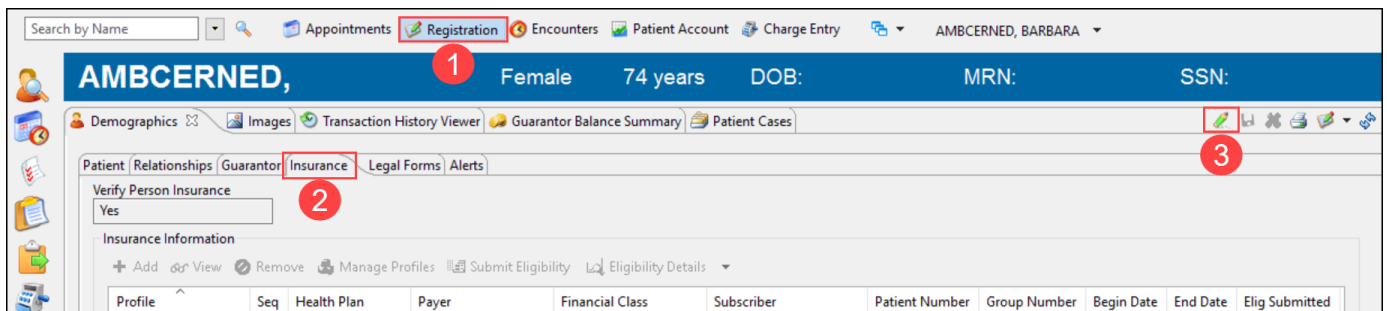
Insurance Addition to Encounters for Clinical and Clerical Staff

7. Click the Save icon.

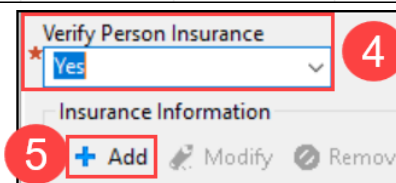


Adding Insurance to Patient Perspective

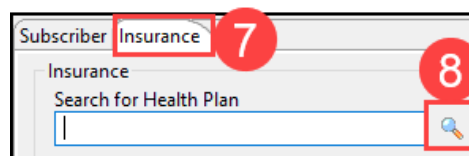
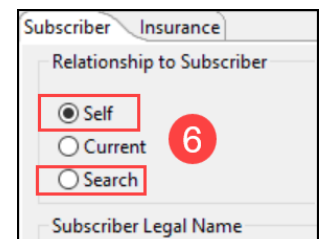
1. Within the patient's chart, navigate to Registration perspective.
2. Select the Insurance tab.
3. Click the Modify (green pencil) icon.



4. Select Yes to Verify Person Insurance.
5. Click Add.



6. Select the Subscriber. Select Self to add the patient as the subscriber, or Search to search for an alternative subscriber.
7. Select the Insurance tab.
8. Click on the magnifying glass to search for a Health Plan.



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9. Search for the plan by typing in the search field and clicking Search.
10. Click the arrow next to the Health Plan name to expand the details.
11. Select the correct Address for the plan.
12. Click Select Health Plan.

Health Plan Search

Search By Starts With Contains

Plan Name 9

Health Plan	Insurance Office	Type	Address	Payer	Financial Class	Plan
> Priority Caid HMP				Priority Health	MEDICAID HMO HMP	Heal
10 > Priority Health				Priority Health	PRIORITY HEALTH	Heal
		Business	PO Box 232 Grand Rapids MI 49501 (800) 942-4765			
			<Unspecified Address>			

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13. Enter all required Plan Details.
14. Click OK.

Subscriber Insurance

Insurance

Search for Health Plan

Payer

Health Plan Name

Health Plan Business Address

Other Health Plan

Address Line 1 Address Line 2

Country Zip Code City State

Plan Details

Begin Date End Date

Subscriber Member Number Group Number Medicare HIC#

[▶ Additional Plan Details](#)

[▶ Insured Name on Card](#)

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15. Click on Manage Profiles.

Patient Relationships Guarantor Insurance Legal Forms Alerts

Verify Person Insurance

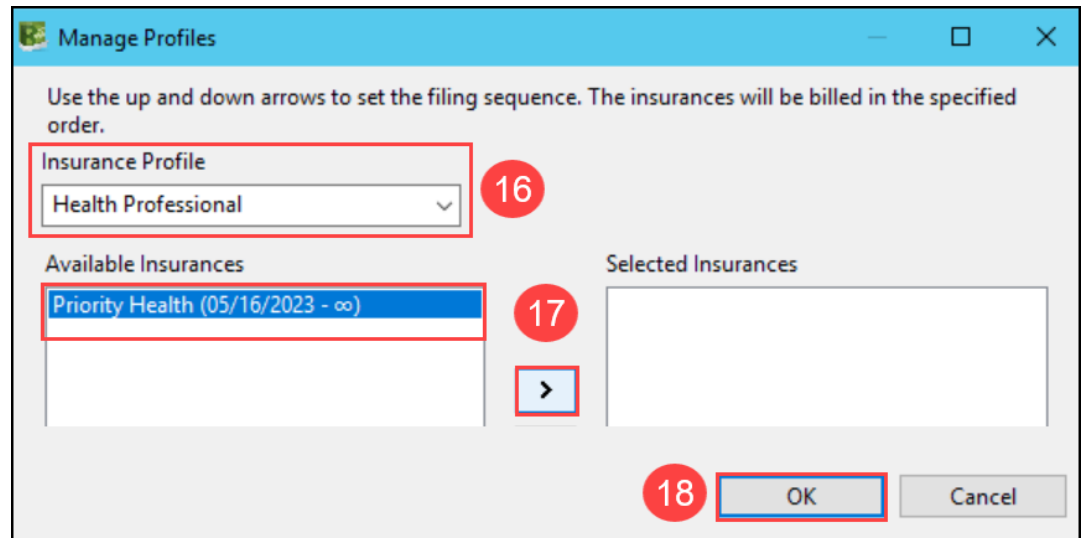
Insurance Information


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Profile	Seq	Health Plan	Payer	Financial Class
> Unassociated				
		Priority Health	Priority Health	PRIORITY HEALTH

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16. Select the Insurance Profile.
17. Click on the correct Available Insurances and click the Arrow to add it to the Selected Insurances.
18. Click OK.



19. Click the Save icon. 

For full instructions on registering a patient, refer to the document Patient Registration on the [Clinical EHR Education website](#).