Adding a Patient’s Insurance

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Overview

How to add a patient's insurance

Detailed Instructions

1. Click the **Insurance** tab on the patient’s page.
2. Select insurance company for the patient from the **Pick Carrier** or **Pick Profile** drop down box.
3. Then, select the proper **Subscriber** by clicking the drop down arrow.
4. Complete subscriber’s information if any information is missing, for example "Employer" or “Group Number”
5. Add any additional notes.

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