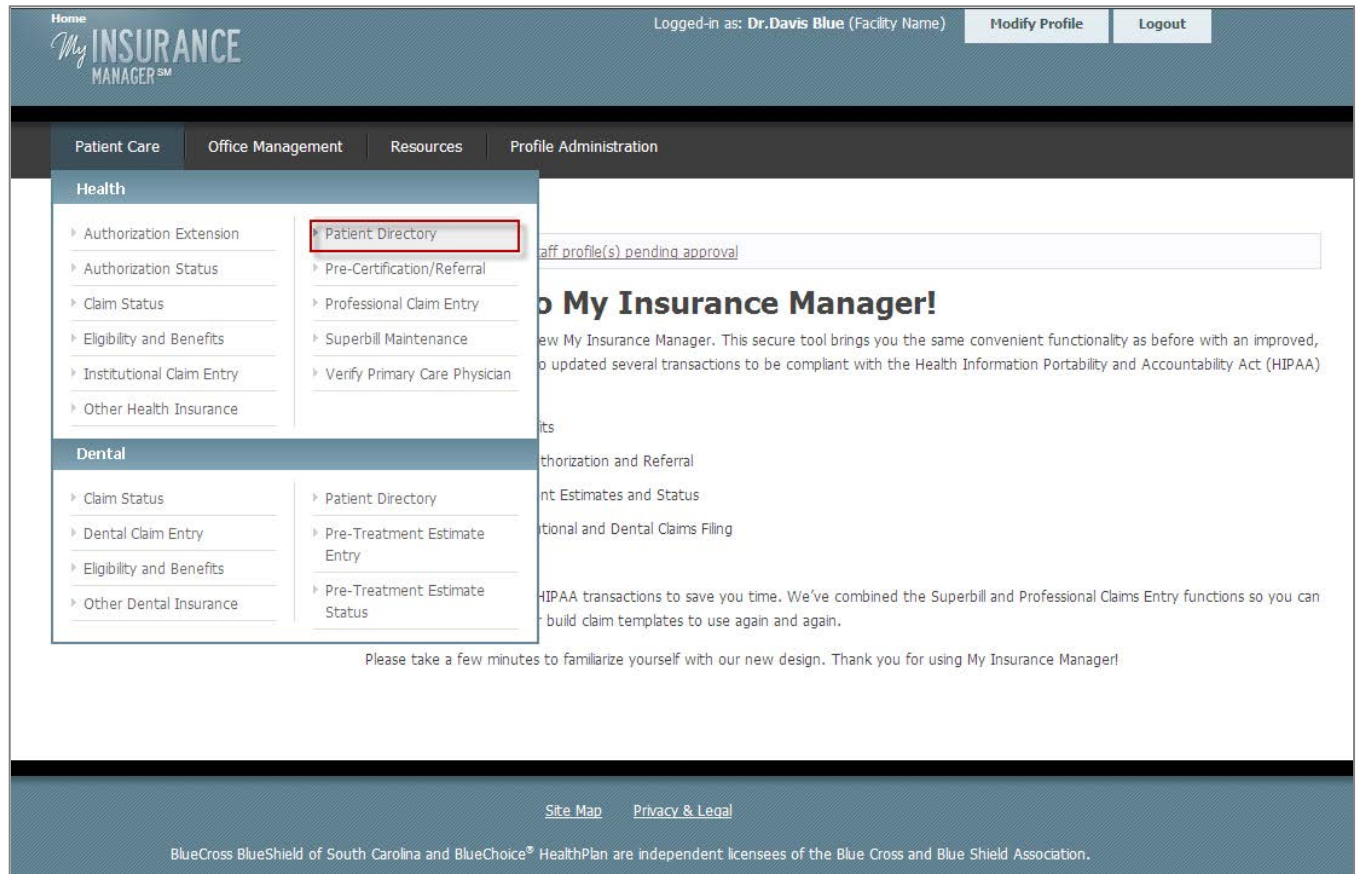


My **INSURANCE**
MANAGERSM

PATIENT DIRECTORY
USER GUIDE

Your Patient Directory allows you to add a patient's routine information, such as address and member ID, to a directory you manage. You can easily pre-populate many required fields for claims entry by selecting a patient from your directory. You can also add, delete and update patient information in your directory.

After logging into My Insurance Manager, you can access the Patient Directory from several locations.



In this example, under Patient Care, choose Patient Directory.

PLAN AND LOCATION SELECTION

Your Patient Directory

* Indicates required field.

Plan Information

Please select a Plan and enter the Date of Service for your search.

* Health/Dental Plan:

BlueCross BlueShield Plans

—Please Choose One—

BlueCross BlueShield Plans

BlueChoice HealthPlan

State Health Plan

mm/dd/yyyy

Location Information

Please select a Location.

Provider Name:

Select

Provider ID:

Search/Edit Patient

Add A Patient

Under Plan Information, choose the patient's Health Plan from the list. Then choose the Date of Service.

Your Patient Directory

* Indicates required field.

Plan Information

Please select a Plan and enter the Date of Service for your search.

* Health/Dental Plan:

BlueCross BlueShield Plans

* Date of Service:

📅

mm/dd/yyyy

Location Information

Please select a Location.

Provider Name:

Select

Provider ID:

222332222

Search/Edit Patient

Add A Patient

Under Location Information, click Select to pick the Provider's Name for the patient's visiting location. The Provider ID field will automatically populate.


Note: From this page you can either Search, Edit or Add a Patient.

PATIENT DIRECTORY SEARCH

Total Patients: 963 ✕


Patient Directory Search

Search Last Name Alphabetically

 Browse your directory alphabetically by the first letter of the patient's last name.

ABCDEFGHIJKLMNOPQRSTUVWXYZ

Patient Search

 You can search either by Member ID, Patient's Account Number or Patient's Last Name.

Member ID: <input type="text"/>	Patient's Account Number: <input type="text"/> <small>(Include alpha prefix, if applicable)</small>
Patient's Last Name: <input type="text"/>	Patient's First Name: <input type="text"/>

Once you select Search/Edit Patient, the Patient Directory Search window will appear. You will have several different patient search options. You can search by the:

- First letter of the Patient's Last Name
- Member ID number or Social Security Number
- Patient's Account Number (ID Card Number)
- Patient's Last Name
- Patient's First Name

PATIENT DIRECTORY SEARCH

Patient Directory Search Total Patients: 963

Results Patients Found: 5

Select	Name ▲	Member ID	Date of Birth	Created	Last Updated	Action
<input type="radio"/>	ZALEWSKI, REBECCA	123-45-6789	01/01/1956	06/08/2009	06/08/2009	Edit Delete
<input type="radio"/>	ZANFARDINO, MICHAEL J	234-56-7890	02/01/1957	06/13/2008	06/13/2008	Edit Delete
<input type="radio"/>	ZIEBA, KRISTINA	345-67-8901	03/01/1956	06/30/2011	06/30/2011	Edit Delete
<input type="radio"/>	ZIMOVAN, GARY	111-22-3333	04/01/1968	11/29/2010	11/29/2010	Edit Delete
<input type="radio"/>	ZZERESKO, PAUL	222-33-4444	05/01/1968	09/27/2011	09/27/2011	Edit Delete

[Continue](#) or [Back](#)

If you choose to search by the first letter of the patient’s last name, you will receive a list of all patients whose last names start with that letter. For this example, we used “Z.” From this screen, you can select the patient and choose to Continue, Edit or Delete the patient’s information.

If you select Continue, you must indicate if you want to start a dental, institutional or professional claim entry.

Your Patient Directory

* Indicates required field.

Plan Information

Please select a Plan and enter the Date of Service for your search.

* Health/Dental Plan:

* Date of Service:

mm/dd/yyyy

Location Information

Please select a Location.

Provider Name:
 [Select](#)

Provider ID:

[Search/Edit Patient](#)
[Add A Patient](#)

Selected Patient

Patient Name: Member ID: Date of Birth:

Start dental claim entry

Start institutional claim entry

Start professional claim entry

[Continue](#)

EDIT OR ADD PATIENT INFORMATION

Your Patient Directory

Patient Details

Required fields feature an asterisk (*).

Patient Information

Last Name: * First Name: * MI: Suffix: Sex: * Date of Birth: * / / (mm/dd/yyyy)

Relationship to Member: * Member ID: * (As shown on the member's ID card.)

Address Line 1: * Address Line 2:

City: * State: * ZIP/Postal Code: * -

Country: (If outside US) Patient Account Number:

Health Plan: *

Release of Information *

Patient Signature Source: *

Payment Assigned *

Member Information

Please update or add missing information.

Last Name: * First Name: * MI: Suffix:

Address Line 1: * Address Line 2:

City: * State: * ZIP/Postal Code: * -

Country: (If outside US)

Date Created: **06/08/2009** Time Created: **16:40:30** Last Updated: **06/08/2009** Time Updated: **16:40:30**

When you choose Edit or Add from the Patient Directory Search, you will see this page. Enter the patient's information and click Update to save.

ACCESSING THE PATIENT DIRECTORY FROM CLAIMS ENTRY

My INSURANCE MANAGERSM

Logged-in as: Dr. Blue (Lexington Test Admin) [Modify Profile](#) [Logout](#)

Patient Care | Office Management | Resources | Profile Administration

Health

- ▶ Claim Status
- ▶ Eligibility and Benefits
- ▶ Other Health Insurance
- ▶ Patient Directory
- ▶ Professional Claim Entry
- ▶ Verify PCP
- ▶ Authorization Extension
- ▶ Authorization Status
- ▶ Institutional Claim Entry
- ▶ MIM 1.0 Authorization/Pre-Certification/Referral
- ▶ Pre-Certification/Referral
- ▶ Superbill Maintenance

Dental

- ▶ Claim Status
- ▶ Dental Claim Entry
- ▶ Eligibility and Benefits
- ▶ Other Dental Insurance
- ▶ Patient Directory
- ▶ Pre-Treatment Entry
- ▶ Pre-Treatment Estimate Status

Welcome to My Insurance Manager!

We have recently updated and improved My Insurance Manager. This secure provider portal continues to offer the same functionality as our previous version, but with new HIPAA-compliant transactions, now updated for compliance with HIPAA version 5010:

- ▶ Authorization and Referral
- ▶ Pre-Treatment Estimate and Status
- ▶ Superbill Maintenance, Institutional, and Dental Claims Filing

To access these transactions, click on the top menu to access these transactions. Under Patient Care you will also find tools to check authorization status, verify other health/dental insurance and primary care physician information for patients, and verify claim templates.

To view remittances and Your Mailbox, click on Office Management.

To find My Insurance Manager user guides and links to provider education and reference materials.

If you are a Profile Administrator for your location, click on Profile Administration to manage the My Insurance Manager user profiles for your office staff.

In addition to updating the look and feel of the site, we have streamlined our HIPAA transactions to save you time. We have combined the Superbill and Professional Claim Entry functions, allowing you to key a claim from scratch, or to build claim templates to use again and again. Look for more improvements in the coming months.

You can also access the Patient Directory under Patient Care by choosing either Professional or Institutional Claim Entry.

After going through the Welcome and Provider Information screens, you'll see the Patient Information screen.

ACCESSING THE PATIENT DIRECTORY FROM CLAIMS ENTRY

Provider Information
Patient Information
Claim Information
Claim Lines
Review
Confirmation

Date of Service
10/09/2011

Insurance
Plan Name:
BlueCross BlueShield Plans

* Indicates required field.

Patient Information

Patient Details

[Choose a Patient](#) or enter the information below.

* Member ID: (include alpha prefix, if applicable) * Relationship to Member: * Patient Account Number:

* Last Name: First Name: M.I.: Suffix:

* Date of Birth: mm/dd/yyyy * Gender:

* Country: (If outside US)

* Address Line 1: Address Line 2:

* City: * State: * ZIP Code: -

Click Choose a Patient. This will take you the Patient Directory Search screen shown on page 4. To search for or add a patient, follow the steps on pages 4-6.