Insurance and ICD-10 codes

Retriever User Guide V1

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How to Enter Patient Insurance Information

1. To enter Insurance for a new patient or a patient who currently does not have insurance entered in Retriever, first enter patient information, ordering provider and specimen information. Then click the *Insurance* button.

2. Click *Create New Insurance.*

3. The primary tab is displayed with the cursor in the *Insurance Plan* field. Begin typing the patient's insurance plan.

4. Numerous plans exist in Copia and will populate once you begin typing. If the plan is listed, select it by clicking the plan name.

   * If the plan is **not** listed go to step 6 for instructions on how to enter a new plan.

5. Verify the Insurance Plan Information is correct and click *Select*. (Skip to Step 9)

6. If the plan is not listed click the *New Company and Plan* button.

7. Complete all sections in RED, which are required.
8. Then click *Save and Select*.

9. Under the *Primary* tab, enter the primary plan information, all fields in RED are required and must be completed.

10. Select the appropriate drop down in the *Relationship to Insured** field:

    *Self, Spouse, Parent, Child, Other

    a. A pop up will be displayed.

    b. If *Self* was selected, it will ask "Should the patient's information be filled in for the insured's Information?"

    c. If *Spouse, Parent, Child, Other* was selected, it will ask "Should the patient's Phone and Address information be filled in for the insured's information?"

    d. YES will populate the patient information that was provided.

    e. NO leaves the fields ready for manual input of information.

    f. All Fields in RED must be completed and are required.

11. If Primary Insurance is the **only** insurance information provided:
    a. *With* Guarantor information provided, *skip to step 13*.
    b. *Without* Guarantor information provided, <u>Select Save</u> to apply the insurance to the patient.
    *If Secondary and/or Tertiary Insurance is provided skip to step 12

Secondary and Tertiary insurance is not required

12. To enter the Secondary Insurance information Click on the corresponding Tab and follow the same steps for entering primary insurance.

a. Tertiary Insurance information can only be added after the secondary insurance is entered.

13. To enter the Guarantor, click the corresponding tab and enter required fields in red.

a. *Fill with Primary Insured* can be selected if the Primary Insured is the guarantor.

b. A pop up stating to *Discard Previous Insurance Information* is displayed (this refers to information entered under this tab). If you want to use the same information as Primary insurance, Select Continue. If not select cancel and manually enter the information. All fields in red are required and must be completed.

14. Select Save to apply the insurance entered under all tabs to the patient and order.

15. You will be taken back to the orders page.
16. The *Insurance* button will be green and the Payor(s) field will display the insurance.

Making Edits to Insurance

Corrections **BEFORE** saving:

17. If the wrong Insurance has been entered prior to saving you may select *Remove*.

18. A pop up will appear asking to discard or keep the information on the tab you are under.
19. To delete the insurance information click *Discard Information*.

20. You will be taken back to the Insurance Plan field. Select a different insurance plan using the instructions above.

Corrections **AFTER** Saving Insurance information:

21. If the Payor(s) field displays the incorrect insurance or to make changes to insurance information, click on the *Insurance* Button.

22. Patient Insurance Summary will display the Current Insurance plans. To make changes to the order of the insurance plans, below *Rearrange* click on the arrow buttons to rearrange the plans. Click Save.

23. If changes within a plan need to be updated select the tab for the plan that needs to be edited. The plan that is selected will be listed at the top of the box.
24. Before making changes verify you are in the correct tab.
25. Make needed changes and Save.

REQUIRED ICD-10 codes

ICD-10 codes are required for insurance billing and must be provided

26. Select your Test under Order Choice.
27. In the diagnoses field you can search for the diagnoses/ICD-10 codes by clicking Search.

28. If you know the code, enter it and select search and the ICD-10 code will populate below diagnoses, next to the test and also above the diagnoses search field.

29. If you do not know the ICD-10 code, you will be directed to the Diagnoses Search screen. Type the Diagnoses in the search field and click Search.

30. Make your selection by clicking the box next to the ICD-10 code. Select all codes that apply.

31. Review the codes selected by clicking *Show Selected Items* at the bottom.
32. If you selected a code in error, click Remove, to remove the unwanted code.
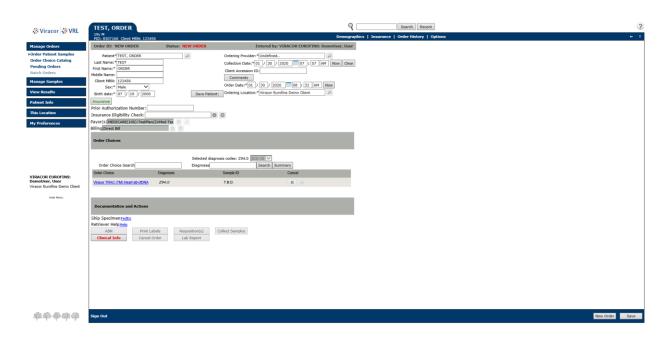33. Once all desired codes are selected click *Add All Selected Items.*

34. ICD-10 codes are displayed under Diagnoses, next to the test name and also shown above the Diagnoses search field.

35. To Remove ICD-10 code(s) from the order, click on the ICD-10 code needing to be removed.
36. Then select *Remove from this Order*.

37. The code will be removed.

38. Verify the Ordering Provider has been provided, as it is required for insurance billing.
39. Verify the rest of the order is correct and click *Save* to save your order.
40. Be sure to print your manifest to include with your specimen.