



## \*\*\* Important Reminders Concerning Insurance Records in ESM \*\*\*

- There can only be one active insurance record per client. It is important for all past insurances to have an end date. If an Insurance record does not have an end date, EIM will consider it active and may reject any billing to DPH.
- There must not be any overlap in Insurance dates.
- No insurance record should ever be overwritten, unless you have entered an error and are making a correction.
- The original data cannot be restored once an overwritten record has been saved.

## Closing Insurance Records when there are Multiple Open Records

1. Select [Client] Module.
2. Search for client using [ID/ID Type] or [Last Name/First Name].
3. From the Search Results, select the Client by clicking on [Last Name] link.
4. From the Client Face Sheet Summary, scroll down to Insurance section.
5. Identify insurance record(s) that need to be 'Closed' with 'Effective To' date

Insurance						
Insurance Name	Type	Policy Number	Group Number	Effective From	Effective To	Primary
Fallon_Community_Health_Plan	HMO			01/01/2009		No
Medicaid	Medicaid HMO			02/01/2008		No
No Insurance	Uninsured			02/10/2007		No

6. Select [Insurance] from left-hand navigation menu.
7. Click on the [Insurance Name] link that needs the Effective To date filled in.

**Note:** All insurance records will display, but note that the Effective From date does not display on this page.

Home	Clients	Case Management	Billing	Credentials	Report	Help	Logout												
Current Location: Client > Client Search > Face Sheet > Insurance																			
<b>Manage Client</b> » Face Sheet » Client Summary » Personal Info » Referrals » Relations » Insurance » Consents » Single Activity Eligibility » Enrollments » Waivers » Services » Primary Care Provider		<b>Client #253890 : Jane C. Fog</b> <b>Insurance</b> <table border="1"> <thead> <tr> <th>Insurance Name</th> <th>Insurance Type</th> <th>Primary Insurance</th> </tr> </thead> <tbody> <tr> <td><a href="#">Fallon_Community_Health_Plan</a></td> <td>HMO</td> <td>No</td> </tr> <tr> <td><a href="#">Medicaid</a></td> <td>Medicaid HMO</td> <td>No</td> </tr> <tr> <td><a href="#">No Insurance</a></td> <td>Uninsured</td> <td>No</td> </tr> </tbody> </table> <p>  Display 1 to 3 of 3  </p> <p style="text-align: right;"><a href="#">Add Insurance</a></p>						Insurance Name	Insurance Type	Primary Insurance	<a href="#">Fallon_Community_Health_Plan</a>	HMO	No	<a href="#">Medicaid</a>	Medicaid HMO	No	<a href="#">No Insurance</a>	Uninsured	No
Insurance Name	Insurance Type	Primary Insurance																	
<a href="#">Fallon_Community_Health_Plan</a>	HMO	No																	
<a href="#">Medicaid</a>	Medicaid HMO	No																	
<a href="#">No Insurance</a>	Uninsured	No																	

8. Fill in the [Effective To] date to close this record. (**Note:** The insurance must be closed out with a date prior to when the new Insurance begins.)

**For example:**

Insurance Name	Effective From	Effective To
Fallon Community Health Plan	01/01/2009	
Medicaid	02/01/2008	12/31/2008
No Insurance	02/10/2007	01/31/2008



9. Select **[Save Changes]** button.

Home | Clients | Case Management | Billing | Credentials | Report | Help | Logout

Current Location: Client > Client Search > Face Sheet > Insurance > Update Insurance

Manage Insurance

- » Insurance
- » Insurance Benefits

Client #253890 : Jane C. Fog

Edit Insurance

\*Insurance Type: Uninsured Primary Insurance: ☐

\*Insurance Name: Void

Insurance Plan Name:

Insurance Policy Number:

Insurance Group Number:

\*Effective From: 02/10/2007 Effective To: 01/31/2008

Comments:

Date Added: 06/01/2007 10:20:44 AM Created By: ddph

Date Modified: 06/01/2007 11:56:43 AM Modified By: edph

Save Changes

### Adding a New Insurance Record if there is no Pre-existing Record

1. Select **[Client]** Module.
2. Search for client using **[ID/ID Type]** or **[Last Name/First Name]**.
3. From the Search Results, select the Client by clicking on **[Last Name]** link.
4. From the Client Face Sheet Summary, select **[Insurance]** from left-hand navigation menu.  
**Note:** A blank screen will display with message in red that says 'No Insurance Information Found. Please [add insurance](#).
5. Click **[Add Insurance]** link.

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Current Location: Client > Client Search > Face Sheet > Insurance

Manage Client

- » Face Sheet
- » Client Summary
- » Personal Info
- » Referrals
- » Relations
- » Insurance
- » Consents
- » Single Activity Eligibility
- » Enrollments
- » Waivers
- » Services
- » Primary Care Provider

Client #261613 : Eleanor Roosevelt

Insurance

No Insurance Information found. Please [add Insurance](#)

6. Select 'Insurance' Type from drop-down menu (**Note:** If the Client has no insurance select 'Uninsured' from drop-down menu.)

### Definitions of Insurance Type Codes Listed in Table

Insurance Type Codes	
Code Value	Description
Uninsured	Uninsured
AP	Auto Insurance Policy
C1	Commercial
CP	Medicare Conditionally Primary



GP	Group Policy
HM	Health Maintenance Organization (HMO)
IP	Individual Policy
LD	Long Term Policy
LT	Litigation
MB	Medicare Part B
MC	Medicaid
MI	Medigap Part B
MP	Medicare Primary
OT	Other
PP	Personal Payment (Cash - No Insurance)
SP	Supplemental Policy

7. Select **[Insurance Name]** (**Note:** Not needed if client is uninsured.)
8. Check box if the insurance being entered is the **[Primary Insurance]** (**Note:** There must be one primary insurance on file per client.) (Note: the system will not allow you to select an "Uninsured" record as primary.)
9. Type in **[Insurance Plan Name\*]**.
10. Type in **[Insurance Policy Number\*]**.
11. Type in **[Insurance Group Number\*]**.
12. Type in **[Effective From]** date.
13. Leave **[Effective To]** date blank if the insurance is active.
14. Select **[Save New Insurance]** button.

\*If this information is not available, the record can still be saved.

Home Clients Case Management Billing Credentials Report Help Logout

Current Location: Client > Client Search > Face Sheet > Insurance > Add Insurance

Manage Client

- » Face Sheet
- » Client Summary
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- » Insurance
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- » Single Activity Eligibility
- » Enrollments
- » Waivers
- » Services
- » Primary Care Provider

Client #261613 : Eleanor Roosevelt

Add Insurance

\*Insurance Type: IP Primary Insurance: ☒

\*Insurance Name: Blue Cross Blue Shield of MA

Insurance Plan Name:

Insurance Policy Number:

Insurance Group Number:

\*Effective From: 01/01/2009 Effective To:

Comments:

Save New Insurance

For system and access questions call:

**Virtual Gateway Customer Service ([www.Mass.Gov/vg](http://www.Mass.Gov/vg)): 1-800-421-0938**

For program policy or data forms questions call:

**DPH Resource Center: 1-800-232-0093**