

CAREWare includes options to customize the insurance list for the *Annual Review Insurance Assessment*. In prior builds, the option *Other* was selected with the name of the insurance entered in a text box. Users can now update the list of insurance options to match their program's needs.

Here we can see the list of HRSA-defined insurance options and Other.

Find Client > Search Results > Demographics > Annual Data > Insurance Assessments > Add

Save Cancel

Add

Insurance Assessment Date: 06/10/2021

Primary Insurance: [Dropdown]

RSR

Medicare (unspecified):

Medicaid:

No Insurance:

Other:

Medicare Part A/B:

Medicare Part D:

Private - Employer:

Private - Individual:

VA, Tricare and other military health care:

IHS:

Full LIS:

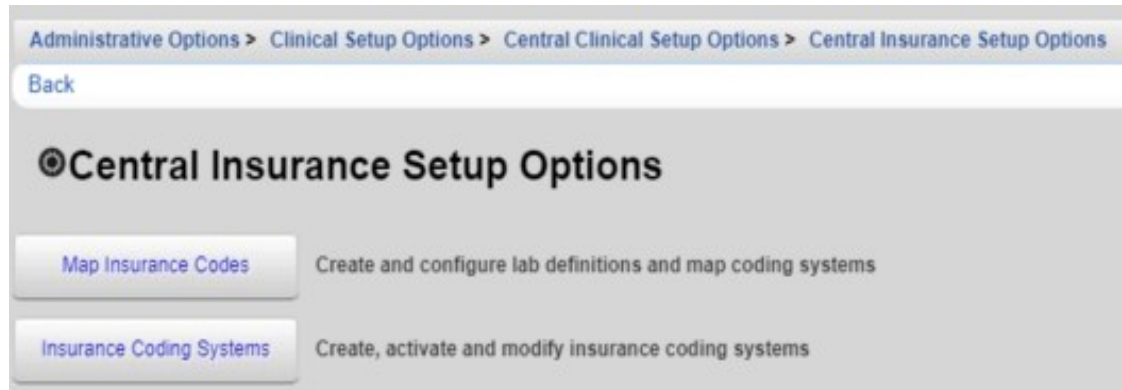
Other Insurance Specify: [Text Box]

High Risk Insurance Pool:

Insurance Setup can be used to include more options on the insurance assessment list, map insurance options to the *RSR*, and group insurance options together. *Insurance Setup* is completed in *Central Administration* under *Clinical Setup*.

To navigate to *Insurance Setup*, follow these instructions:

1. Log into Central Administration.
2. Click *Administrative Options*.
3. Click *Clinical Setup*.
4. Click *Central Clinical Setup*.
5. Click *Insurance Setup*.



Map Insurance Codes – Users can group insurance options together in a custom-created system and make choices about how that insurance option is used.

Insurance Coding Systems – Users add insurance systems and codes, expanding the list of insurance options.

To add a new insurance system, follow these instructions:

1. Click *Insurance Coding System*.
2. Click *Add System*.
3. Enter a *Name*.

Administrative Options > Clinical Setup Options > Central Clinical Setup Options > Central Insurance Setup Options > Insurance Coding Systems

Activate Deactivate **Add System** Edit System Info Manage Codes Delete Back Print or Export

Insurance Coding System Manager

Search:

Active	Name
Yes	RSR

4. Click Save.

Administrative Options > Clinical Setup Options > Central Clinical Setup Options > Central Insurance Setup Options > Insurance Coding Systems

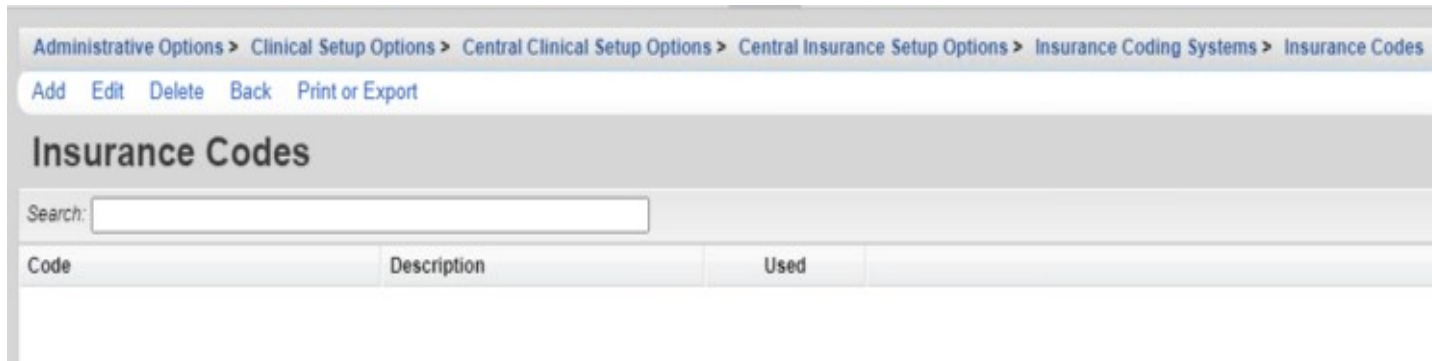
Activate Deactivate Add System Edit System Info Manage Codes Delete Back Print or Export

Insurance Coding System Manager

Search:

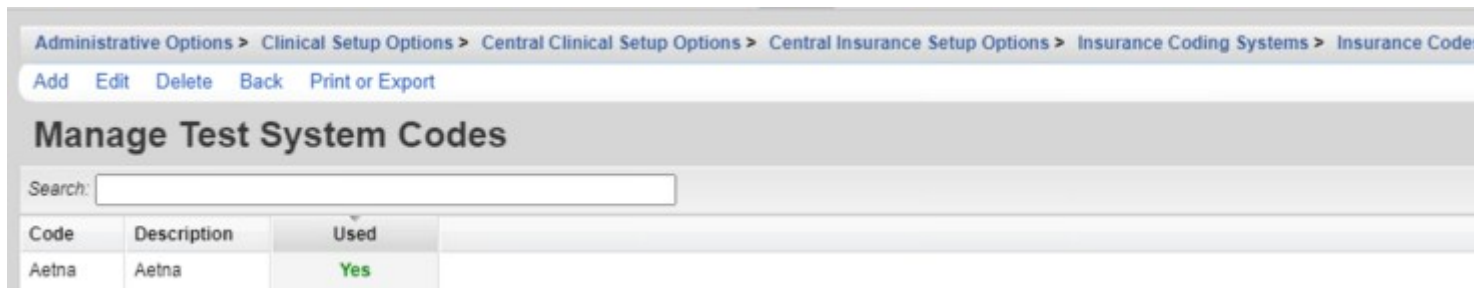
Active	Name
Yes	RSR
Yes	Test System

New insurance options can be added to the new system by clicking *Manage Codes*.



To add new insurance options, follow these instructions:

1. Click *Add*.
2. Enter a *Code*.
3. Enter a *Description*.
4. Click *Save*.



Now that a new insurance option has been added to the list, that insurance option can be activated under *Map Insurance Codes*.

Note: The new insurance code was added under the new system. When managing codes, that insurance code appears when that system is selected.

To activate a new insurance option and determine use, follow these instructions:

1. Click *Map Insurance Codes*.
2. Select an *Insurance Type*.
3. Click *Coding*.

Administrative Options > Clinical Setup Options > Central Clinical Setup Options > Central Insurance Setup Options > Map Insurance Codes

Coding Back Print or Export

Insurance Setup

Search:

Insurance Type	RSR	Test System
IHS	IHS	
Medicaid	Medicaid	
Medicare (unspecifi	Medicare (unspecifi	
Medicare Part A/B	Medicare Part A/B	

4. Click *Add*.

Administrative Options > Clinical Setup Options > Central Clinical Setup Options > Central Insurance Setup Options > Map Insurance Codes > Coding

Add Edit Delete Back Print or Export

Manage undefined Codes

Search:


System	Code	Description	Use
RSR	Medicare (unspecifi	Medicare (unspecifi	Unique
RSR	Medicaid	Medicaid	Unique


5. Select a *System*.
6. Select a *Code*.
7. Select a *Use*.
8. Click *Save*.


Administrative Options > Clinical Setup Options > Central Clinical Setup Options > Central Insurance Setup Options > Map Insurance Codes > Insurance Codes

Save Back

Add

System: 

Code: 

Use: 

The new insurance code has been added to the list.

In this example, Aetna has been mapped to the *Private – Employer* and *Private – Individual* insurance for the *RSR*.

Administrative Options > Clinical Setup Options > Central Clinical Setup Options > Central Insurance Setup Options > Insurance Codes

Coding Back Print or Export

Insurance Setup

Search:

Insurance Type	RSR	Test System
Aetna		
IHS	IHS	
Medicaid	Medicaid	
Medicare (unspecified)	Medicare (unspecified)	
Medicare Part A/B	Medicare Part A/B	
Medicare Part D	Medicare Part D	
No Insurance	No Insurance	
Other	Other	
Private - Employer	Private - Employer	Aetna

When the new insurance option is selected from the drop down list, the *RSR* insurance option it is mapped to is automatically checked in addition to that new insurance.

Find Client > Search Results > Demographics > Annual Data > Insurance Assessments > Edit

Save Cancel

Edit

Insurance Assessment Date: 06/10/2021

Primary Insurance: Aetna

RSR

Medicare (unspecified):

Medicaid:

No Insurance:

Other:

Medicare Part A/B:

Medicare Part D:

Private - Employer:

Private - Individual:

VA, Tricare and other military health care:

IHS:

Test System

Aetna:

Full LIS:

In this example, a client with Aetna insurance is counted in the RSR as having *Private – Employer* insurance.