

ATTACHING INSURANCE IN ECLIPS

- ❑ Access The Patient Either From The **HOME** Or **PATIENT Tab**
- ❑ Once The Patient Is Pulled Up, Select Insurance On Left Side To Enter The Insurance Section

Home Patients Scheduler EHR Optical/Checkout Claims Reports Recall Admin

Create New Benefits Glance Sheet Invoice

William Test (31/M)

Chart Number PT1054
Legacy Number
Date of Birth 04/11/1992
Patient Since 06/09/2023
Preferred Provider
Medical Insurance Vision

- ❑ Then Click Insurance On The Top Right To Add A Plan

Search Patient EssilorLuxottica Optometrist Use Student

Home Patients Scheduler EHR Optical/Checkout Claims Reports Recall Admin

William Test (31/M)

Date of Birth 04/11/1992 Sex M Race White Insurance Plan Vision
Chart # PT1054 Prof. Location: Repeat Optician/Dentist
Legacy # Prof. Provider

PREPARED COMMUNICATION NEXT SCHEDULED APPOINTMENT

Create New Appointment Benefits Invoice Insurance

Insurance Name Policy Type Classification Insured ID Group # Insured Name Relation Status Action

No Insurance to display

- ❑ Then Add The Insurance Details From The Drop-Down Bars
- ❑ Complete: Type Of Insurance, Valid Dates, Classifications, Active Status, ID Number, Auth # If Relevant, Primary Member, Any Notes, Etc.
- ❑ When Finished, Click Save
- ❑ Note: If The Patient Hasn't Completed DIF You Will Need To Complete The Address

Search Patient EssilorLuxottica Optometrist Use Student

Home Patients Scheduler EHR Optical/Checkout Claims Reports Recall Admin

William Test (31/M)

Date of Birth 04/11/1992 Sex M Race White Insurance Plan Vision
Chart # PT1054 Prof. Location: Repeat Optician/Dentist
Legacy # Prof. Provider

PREPARED COMMUNICATION NEXT SCHEDULED APPOINTMENT

Create New Appointment Benefits Invoice Insurance

New Insurance

Details

Insurance Name Vision Start Date 06/09/2023 End Date 06/09/2023
Insurance Address P.O. Box 8004 Mason, OH 45040-7111
Policy Type Vision

Classification

Classification Primary Plan Name None Group #
Insured ID 1234

Save

- ❑ Repeat A Second Time If You Have A Second Plan To Enter (Medial + Routine)
- ❑ Once Saved, Select Benefits To Tell ECLIPS What The Benefits Are

Search Patient EssilorLuxottica Optometrist Use Student

Home Patients Scheduler EHR Optical/Checkout Claims Reports Recall Admin

William Test (31/M)

Date of Birth 04/11/1992 Sex M Race White Insurance Plan Vision
Chart # PT1054 Prof. Location: Repeat Optician/Dentist
Legacy # Prof. Provider

PREPARED COMMUNICATION NEXT SCHEDULED APPOINTMENT

Create New Appointment Benefits Invoice Insurance

Insurance Name Policy Type Classification Insured ID Group # Insured Name Relation Status Action

EyeMed Vision Primary 1234 William Test Self Active

ATTACHING INSURANCE IN ECLIPS

- ❑ On The Pulldown Bar, Select The Plan You'd Like To Update

William Test (31/M)
Date of Birth: 04/11/1992 Balance: \$0.00 Date of Birth: 04/11/1992
Chart #: PT1054 Ref. Location: D'Napoli Opticians Delmar Ref. Provider: [Redacted]
Legacy # [Redacted]

CREATE NEW Appointments **Benefits** Services Insurance

Insurance Name Policy Type Classification Insured ID Group # Insured Name Relation Status Action
EyedMed (Vision-Primary) Vision Primary 1234 [Redacted] William Test Self Active [Redacted]

- ❑ Then Select New Benefit Request

William Test (31/M)
Date of Birth: 04/11/1992 Balance: \$0.00 Date of Birth: 04/11/1992
Chart #: PT1054 Ref. Location: D'Napoli Opticians Delmar Ref. Provider: [Redacted]
Legacy # [Redacted]

CREATE NEW Appointments Benefits **New Benefit Request** Services Insurance

Insurance Name Policy Type Classification Insured ID Group # Insured Name Relation Status Action
EyedMed (Vision-Primary) Vision Primary 1234 [Redacted] William Test Self Active [Redacted]

- ❑ Select The Enter Benefits Button To Edit Patient Insurance Benefits

Legacy # [Redacted] License # [Redacted]
Patient/Insured Details
William Test Patient Self Relationship to Insured 1234 Insured ID
Insurance
EyedMed (Vision-Primary) None **Enter Benefit** e-Benefit

- ❑ Complete Provider And All Benefit Details
- ❑ Note: Other Than Medicare Materials, All Other Materials Are Billed In Ciao So You Can Leave Material Copays Out, Your Choice

Location: D'Napoli Opticians Delmar Address: 266 Delaware Avenue, Delmar, NY -
Type: [Redacted] Eligibility Authorization
Eligibility
Effective/Expiration: [Redacted]
Type: Eye Exam SP Lens Frames CL Exam CL Material
Eye Exam
Eligible: **Yes** No Exam CoPay: 20 Next Eligible Date: mm/dd/yyyy
Spectacle Lens

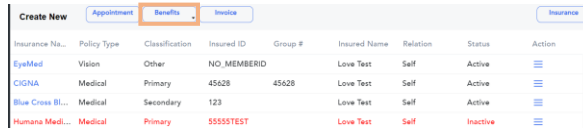
- ❑ Save On The Bottom Right And Close Top Of Open Screen

Save Close

Close Print Edit

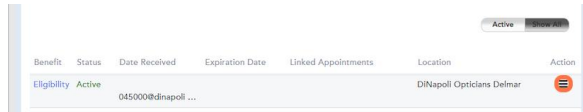
ATTACHING INSURANCE IN ECLIPS

- ❑ From The Landing Page Within The Insurance Section, Select Benefits And The Plan The Patient Is Using From The Dropdown List



Insurance Na...	Policy Type	Classification	Insured ID	Group #	Insured Name	Relation	Status	Action
EyeMed	Vision	Other	NO_MEMBERID		Love Test	Self	Active	
CIGNA	Medical	Primary	45628	45628	Love Test	Self	Active	
Blue Cross Bl...	Medical	Secondary	123		Love Test	Self	Active	
Humana Medi...	Medical	Primary	5555TEST		Love Test	Self	Inactive	

- ❑ Then Select The Hamburger To Link The Appointment



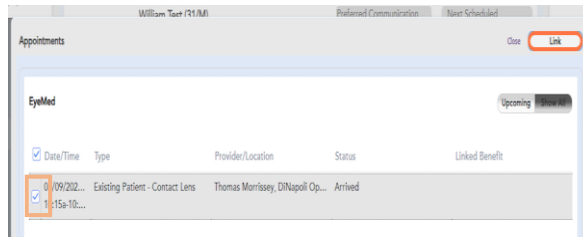
Benefit	Status	Date Received	Expiration Date	Linked Appointments	Location	Action
Eligibility	Active	04/5000@dinapoli...			DINapoli Opticians Delmar	

- ❑ Select Link Appointment



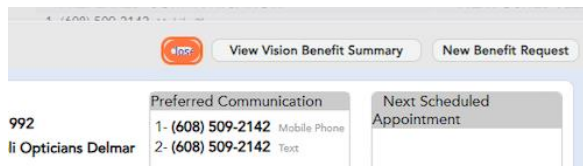
Benefit	Status	Date Received	Expiration Date	Linked Appointments	Location	Action
Eligibility	Active	04/5000@dinapoli...			DINapoli Opticians Delmar	

- ❑ Select The Appointment You Want To Link With The Box On The Left Of The Appointment
- ❑ Select Link Appointment



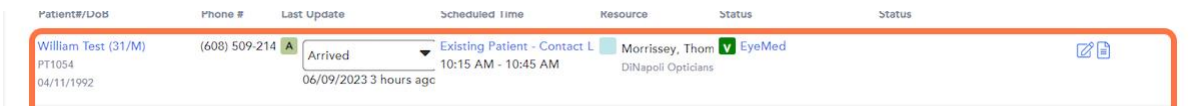
Date/Time	Type	Provider/Location	Status	Linked Benefit
06/09/2023 10:15-10:45 AM	Existing Patient - Contact Lens	Thomas Morrissey, DINapoli Op...	Arrived	

- ❑ Close The Pop-Up Window



Patient# / DoS	Phone #	Last Update	Scheduled Time	Resource	Status	Status
William Test (31/M)	(608) 509-214	Arrived	Existing Patient - Contact L	Morrissey, Thom	EyeMed	

- ❑ If Linked Correctly, The Insurance Will Now Have A Green Box On The HOME Tab



Patient# / DoS	Phone #	Last Update	Scheduled Time	Resource	Status	Status
William Test (31/M)	(608) 509-214	Arrived	Existing Patient - Contact L	Morrissey, Thom	EyeMed	