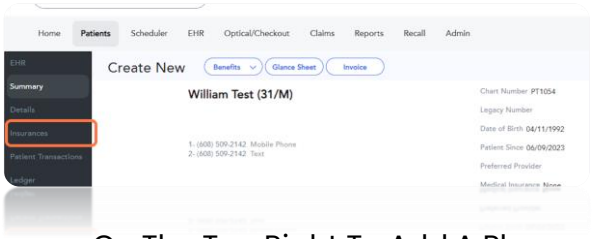
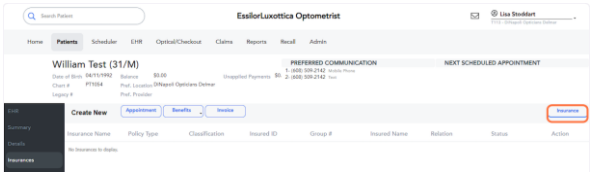
ATTACHING INSURANCE IN ECLiPS

TeamVision
Eye care, together.

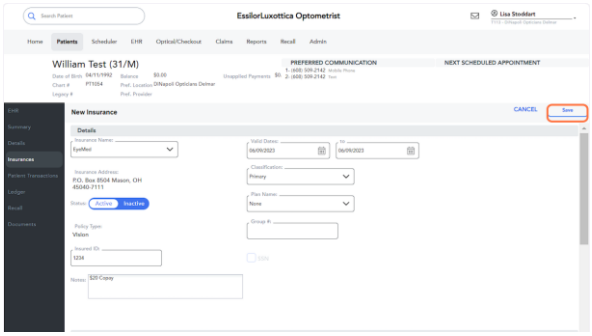
- ❑ Access The Patient Either From The **HOME** Or **PATIENT Tab**
- ❑ Once The Patient Is Pulled Up, Select Insurance On Left Side To Enter The Insurance Section



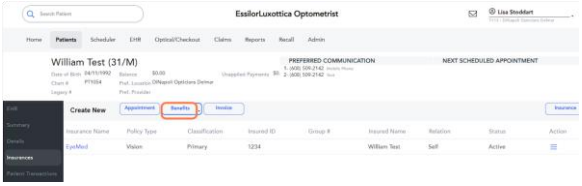
- ❑ Then Click Insurance On The Top Right To Add A Plan



- ❑ 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



- ❑ 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



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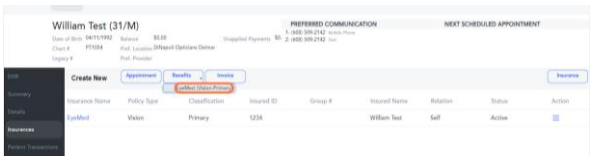
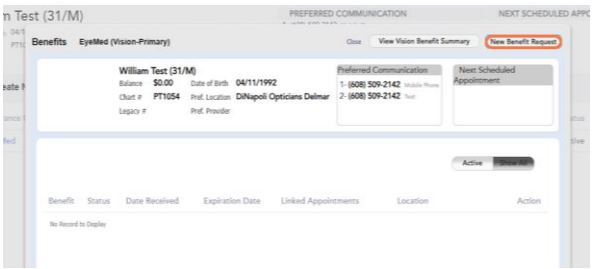
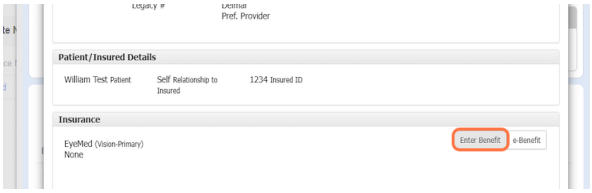
- ❑ On The Pulldown Bar, Select The Plan You'd Like To Update



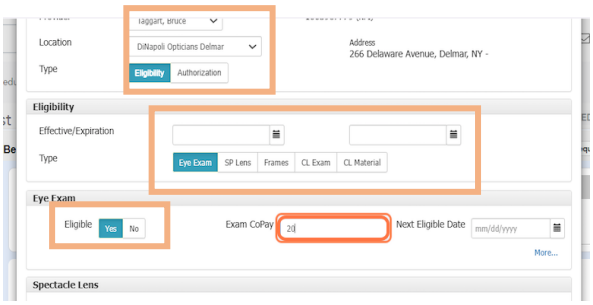
- ❑ Then Select New Benefit Request



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



- ❑ 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



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

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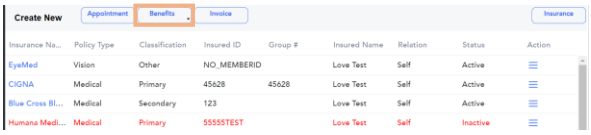
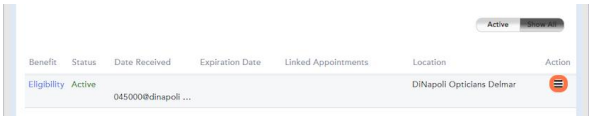
- From The Landing Page Within The Insurance Section, Select Benefits And The Plan The Patient Is Using From The Dropdown List

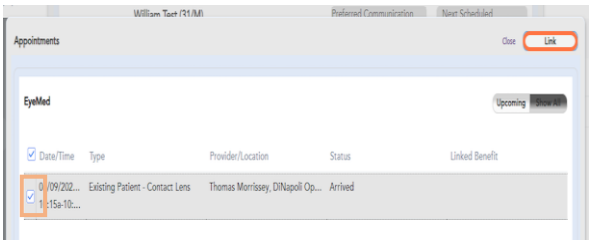


- Then Select The Hamburger To Link The Appointment

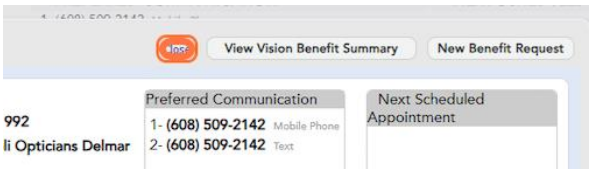
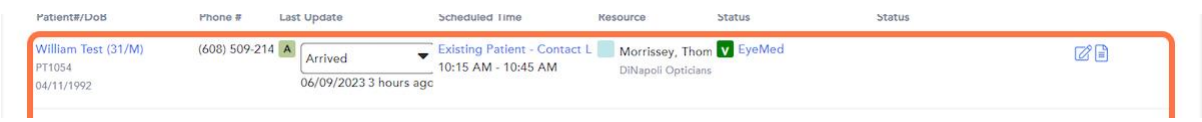


- Select Link Appointment

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



- Close The Pop-Up Window



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