Remove a Secondary Insurance from the Encounter

Clerks

If a patient no longer has an insurance there are 2 ways to remove the insurance from the file.

1. You can go to the additional Insurances tab and clear the **Relationship to Patient** field.

2. A pop-up will appear "**Changing the relation type will remove all information for this related person. Do you want to continue?**" Select **YES**. This will remove the insurance from the encounter.

3. The other option to remove an insurance is to go to the **Insurance Summary** tab, highlight the insurance you wish to remove, and right click.

4. In the menu select **Remove Person and Plan.** This will remove the insurance.

5. If you need to move the secondary insurances around, you can highlight the insurance you want to move, right click and select **Swap Plan.**

6. In the pop-up select the new position number (2-4) you would like this insurance to move to. This is applicable for secondary insurances.

NOTE: If the secondary insurance belongs to the patient it should be the first secondary insurance listed in the number 2 spot in the **Insurance Summary** tab or Additional Insurance 1 section of the **Additional Insurances** tab. In the case of a child that has multiple secondary insurances, whichever subscriber's (usually parent) birthday falls first in the year should be listed as the first secondary insurance.