

Insurance Setup

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.

HRSA-defined Insurance Options

CAREWare includes the HRSA-defined options found under Insurance Assessments in client records. The options are based upon the most current RSR and ADR instructions.

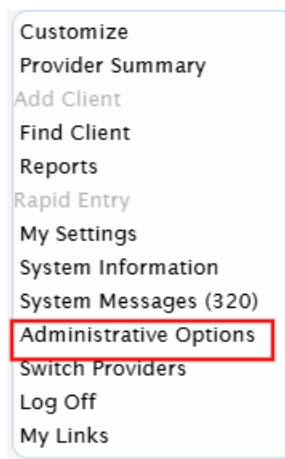
The screenshot shows the 'Add' form for Insurance Assessments. At the top, there is a breadcrumb trail: 'Find Client > Search Results > Demographics > Annual Data > Insurance Assessments > Add'. Below this are 'Save' and 'Cancel' buttons. The form title is 'Add'. It includes a date field for 'Insurance Assessment Date' set to '06/10/2021'. Below that is a text field for 'Primary Insurance:'. A section titled 'RSR' contains several checkboxes: '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:', and 'High Risk Insurance Pool:'. Each checkbox is currently unchecked.

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.

Add Custom Options for Insurance Assessments

Insurance Setup is found in *Central Administration* under *Clinical Setup*.

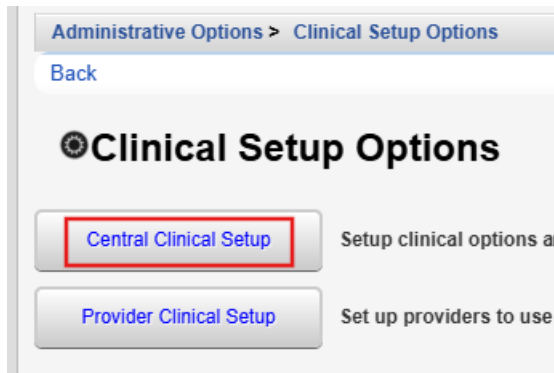
1. Log into Central Administration.
2. Click *Administrative Options*.



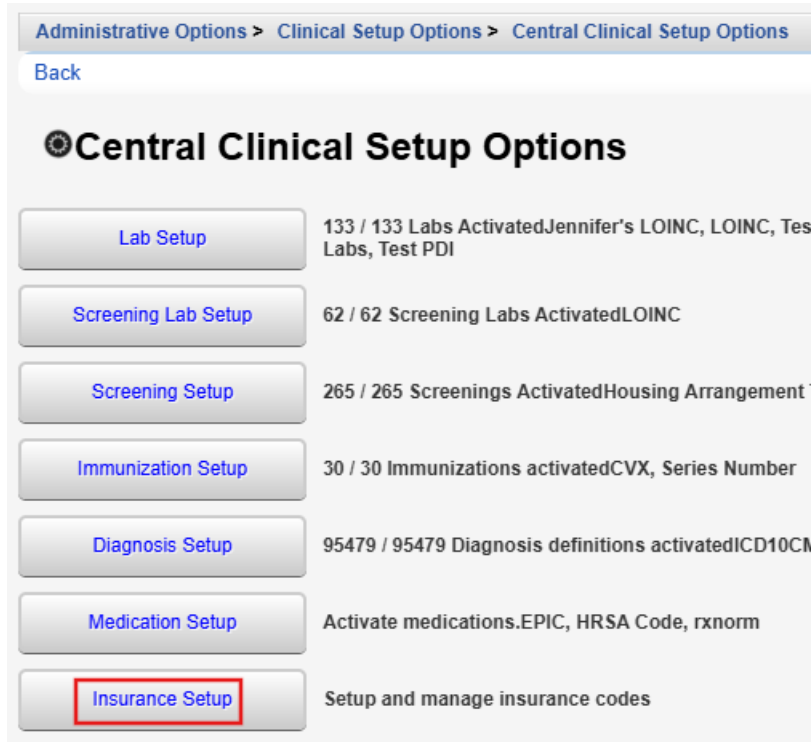
3. Click *Clinical Setup*.



4. Click *Central Clinical Setup*.



5. Click *Insurance Setup*.



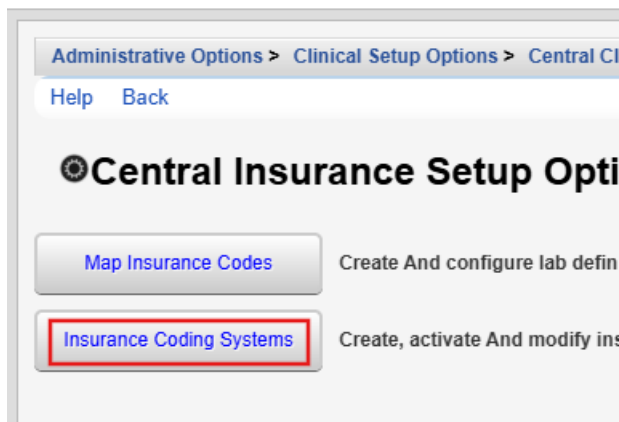


Map Insurance Codes – Users can group insurance options together in a custom-created system and make choices about how that insurance option is used.

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

[Add a New Insurance System to CAREWare](#)

1. Click *Insurance Coding System*.



2. Click **Add System**.

Activate	Deactivate	Add System	Edit System Info	Manage Codes	Export Metadata	Create from PDI Mappings	Delete	Back	Print or Export	Hide/Show Columns
Insurance Coding Systems										
Search:										
PK	Active	Name								
e49c5d50-5a9f-4c0b-bf12-0cfc34f3197c	Yes	RSR								
31733385-d283-47fe-8c4a-1ed2030b2e29	Yes	Test Insurance								
97bf3852-41c4-4e29-a5aa-67d533bf822d	Yes	Medicaid								
03fedbea-d25b-4b96-80a2-7f799bf56db7	Yes	TEST CMS								
80b668c4-a080-4265-9707-da3c3501ec05	Yes	Other								
e6665982-fb79-44f1-acbf-e6a316f1be52	Yes	Test								
4c8db4d3-5ce9-42c9-b3f8-ec61c40ba76a	Yes	Private Insurance One								

Activate: Activate an existing insurance coding system.

Deactivate: Deactivate an existing insurance coding system.

Add System: Add a new insurance coding system.

Edit System Info: Edit the information for an existing insurance coding system

Manage Codes: Manage the codes for an existing insurance coding system.

Export Metadata: Export metadata for an existing insurance coding system

Create from PDI Mappings: Create an insurance coding system based on PDI mappings.

Delete: Delete an existing insurance coding system.

Back: Return to the Central Insurance Setup Options menu.

Print or Export: Print or export a list of existing insurance coding systems.

Hide/Show Columns: Hide or show columns in the list of insurance coding systems.

3. Enter a name for the new coding system.

Administrative Options > Clinical Setup Options > Central Clinical Setup Op

[Save](#) [Back](#)

Insurance Coding Systems

Name:

4. Click **Save**.

Administrative Options > Clinical Setup Options > Central Clinical Setup Op

[Save](#) [Back](#)

Insurance Coding Systems

Name:

Manage Codes for Insurance Coding Systems

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

Administrative Options > Clinical Setup Options > Central Clinical Setup Options > Central Insurance Setup O			
Activate	Deactivate	Add System	Edit System Info
Manage Codes	Export Metadata	Create from F	
Insurance Coding Systems			
Search:			
PK	Active	Name	
e49c5d50-5a9f-4c0b-bf12-0cfc34f3197c	Yes	RSR	
31733385-d283-47fe-8c4a-1ed2030b2e29	Yes	Test Insurance	
97bf3852-41c4-4e29-a5aa-67d533bf822d	Yes	Medicaid	
03fedbea-d25b-4b96-80a2-7f799bf56db7	Yes	TEST CMS	
fd4e108b-3041-4e71-a651-9b048f85fe32	Yes	Testing 1-2-3	
80b668c4-a080-4265-9707-da3c3501ec05	Yes	Other	
e6665982-fb79-44f1-acbf-e6a316f1be52	Yes	Test	
4c8db4d3-5ce9-42c9-b3f8-ec61c40ba76a	Yes	Private Insurance One	

1. Click *Add*.

Administrative Options > Clinical Setup Options > Central Clinical Setup Options > Central Insu			
Add	Edit	Delete	Back
Print or Export	Hide/Show Columns		
Insurance Codes			
Search:			
Code	Description	Used	

2. Enter a code (i.e., name) and description.

Save	Back
Insurance Codes	
Code:	Insurance for Volunteers
Description:	Insurance provided to volunteers.

3. Click *Save*.

Save	Back
Insurance Codes	
Code:	Insurance for Volunteers
Description:	Insurance provided to volunteers.

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

Administrative Options > Clinical Setup Options > Central Clinical Setup Options > Central

Add Edit Delete Back Print or Export Hide/Show Columns

Insurance Codes

Search:

Code	Description	Used
Insurance for Volunteers	Insurance provided	

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

Activate New Codes in Insurance Systems

1. Click *Map Insurance Codes*.

Help Back

Central Insurance Setup Options

Map Insurance Codes

Create And configure lab definitions And map coding systems

Insurance Coding Systems

Create, activate And modify insurance coding systems

2. Select an *Insurance Type*.

Coding Back Print or Export Hide/Show Columns

Insurance Setup

Search:

PK	Insurance Type	Type
094DA930-1FC5-444C-8880-B6576E9BCE98	Aegon	UniqueCode
22B68BBF-0B37-4174-8C9B-EFB85D525424	Aetna	UniqueCode
A0EB313B-D1A2-429D-ABE3-F3CD091B8713	Affinity Health Plan	UniqueCode
17	Association Plan	InsuranceTyp
16	High Risk Insurance	InsuranceTyp
14	Indian Health Service	InsuranceTyp
693471BC-BF39-4006-9D74-76B7E191B333	Julies Awesome Coverage	UniqueCode
3	Medicaid, CHIP or Other Public Plan	InsuranceTyp
2	Medicare (unspecified)	InsuranceTyp
7	Medicare Part A/B	InsuranceTyp
15	Medicare Part C	InsuranceTyp
8	Medicare Part D	InsuranceTyp
5	No Insurance	InsuranceTyp
6	Other Plan	InsuranceTyp
R81D08RF-AFAA-413F-018C-8F0RR5854A4C	Part A	InsuranceCode

3. Click *Coding*.

Coding Back Print or Export Hide/Show Columns		
Insurance Setup		
Search:		
PK	Insurance Type	Type
094DA930-1FC5-444C-8880-B6576E9BCE98	Aegon	UniqueCode
22B68BBF-0B37-4174-8C9B-EFB85D525424	Aetna	UniqueCode
A0EB313B-D1A2-429D-ABE3-F3CD091B8713	Affinity Health Plan	UniqueCode
17	Association Plan	InsuranceTyp
16	High Risk Insurance	InsuranceTyp
14	Indian Health Service	InsuranceTyp
693471BC-BF39-4006-9D74-76B7E191B333	Julies Awesome Coverage	UniqueCode
3	Medicaid, CHIP or Other Public Plan	InsuranceTyp
2	Medicare (unspecified)	InsuranceTyp
7	Medicare Part A/B	InsuranceTyp
15	Medicare Part C	InsuranceTyp
8	Medicare Part D	InsuranceTyp
5	No Insurance	InsuranceTyp
6	Other Plan	InsuranceTyp
R81DD8RF-AFAA-413F-918C-8F98R5854A4C	Part A	UniqueCode

4. Click *Add*.

Add Edit Delete Back Print or Export Hide/Show Columns			
Insurance Codes			
Search:			
System	Code	Description	Use
Private Insurance One	Aetna	Aetna description	Optional
Private Insurance One	Affinity Health Plan	Affinity Health Plan	Optional
RSR	Association Plan	Association Plan	Optional
RSR	High Risk Insurance	High Risk Insurance	Optional
RSR	Other Plan	Other Plan	Unique

5. Select a *System*.

Save Back

Insurance Codes

System: 

Code: 

Use: 

6. Select a *Code*.

Save Back

Insurance Codes

System: 

Code: 

Use: 

7. Select a *Use*.

Save Back

Insurance Codes

System: Testing 1-2-3 ↓

Code: Insurance for Volunteers - Insurance provided to volunteers. ↓

Use: Unique ↓

8. Click *Save*.

Save Back

Insurance Codes

System: Testing 1-2-3 ↓

Code: Insurance for Volunteers - Insurance provided to volunteers. ↓

Use: Unique ↓

The new insurance code has been added to the list.

Add Edit Delete Back Print or Export Hide/Show Columns

Insurance Codes

Search:

System	Code	Description	Use
Private Insurance One	Aetna	Aetna description	Optional
Private Insurance One	Affinity Health Plan	Affinity Health Plan	Optional
RSR	Association Plan	Association Plan	Optional
RSR	High Risk Insurance	High Risk Insurance	Optional
Testing 1-2-3	Insurance for Volunteers	Insurance provided	Unique
RSR	Other Plan	Other Plan	Unique

In this example, Insurance for Volunteers under the Testing 1-2-3 coding system has been mapped to the *Other Plan* insurance for the RSR.

Insurance Setup								
Search:								
PK	Insurance Type	Type	RSR	Test Insurance	Medicaid	TEST CMS	Testing 1-2-3	Other
094DA	Aegon	UniqueCode						
22B68	Aetna	UniqueCode						
A0EB3	Affinity Health Plan	UniqueCode						
17	Association Plan	InsuranceType	Association Plan					
16	High Risk Insurance	InsuranceType	High Risk Insurance	Test Insurance Code				
14	Indian Health Service	InsuranceType	Indian Health Service					
69347	Julies Awesome Coverage	UniqueCode						
3	Medicaid, CHIP or Other	InsuranceType	Medicaid, CHIP or Other Public					
2	Medicare (unspecified)	InsuranceType	Medicare (unspecified), Medical					
7	Medicare Part A/B	InsuranceType	Medicare Part A/B					Part A
15	Medicare Part C	InsuranceType	Medicare Part C					
8	Medicare Part D	InsuranceType	Medicare Part D					
5	No Insurance	InsuranceType	No Insurance					
6	Other Plan	InsuranceType	Other Plan, High Risk Insurance				Insurance for Volun	
B81DC	Part A	UniqueCode						
10	Private - Employer	InsuranceType	Private - Employer					
11	Private - Individual	InsuranceType	Private - Individual					
3EA52	Test Insurance Code	UniqueCode						
FBCB	Testcode2	UniqueCode						
13	VA, Tricare and other mil	InsuranceType	VA, Tricare and other military he					

Adding Custom Insurance Codes in Client Records

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

Save Cancel

Insurance Assessments

Insurance Assessment Date: Page 1 of 3

Primary Insurance: Indian Health Service

Association Plan: Indian Health Service

High Risk Insurance: Insurance provided to volunteers.

Indian Health Service:

Insurance Assessments

Insurance Assessment Date: 11/21/2025

Primary Insurance: Insurance provided to volunteers.

RSR/ADR

Association Plan: ☐

High Risk Insurance: ☐

Indian Health Service: ☐

Medicaid, CHIP or Other Public Plan: ☐

Medicare (unspecified): ☐

Medicare Part A/B: ☐

Medicare Part C: ☐

Medicare Part D: ☐

No Insurance: ☐

Other Plan: ☒

Private - Employer: ☐

Private - Individual: ☐

VA, Tricare and other military health care: ☐

Test Insurance

Test insurance code: ☐

Medicaid

TEST CMS

Testing 1-2-3

Insurance provided to volunteers.: ☒

In this example, a client with *Insurance provided to volunteers* is counted in the RSR as having *Other Plan* insurance.