

How to Place Insurance Orders on Upgraded SupplyManager

Welcome to your upgraded insurance ordering experience! We're excited to make your insurance ordering transition smoother so you can enjoy a more intuitive and secure ordering process, designed just for you.

Access Insurance Ordering Workflow

In the upper right, select the down arrow next to your account information to open the account selector pane. From the account selector, select a **Clinician**, **Patient**, and **Shipping Address** to start a new insurance order.

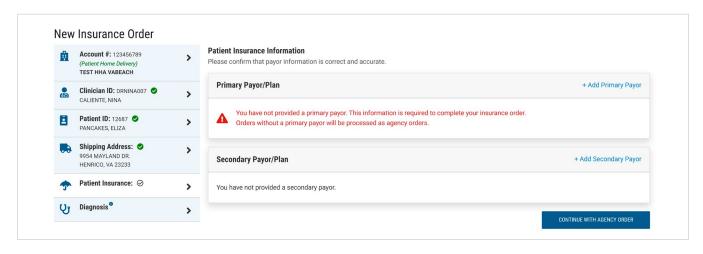


View Insurance Information

The **New Insurance Order page** provides an overview of your selected account, (clinician, patient, shipping address), and any existing insurance information associated with the patient in the left pane.

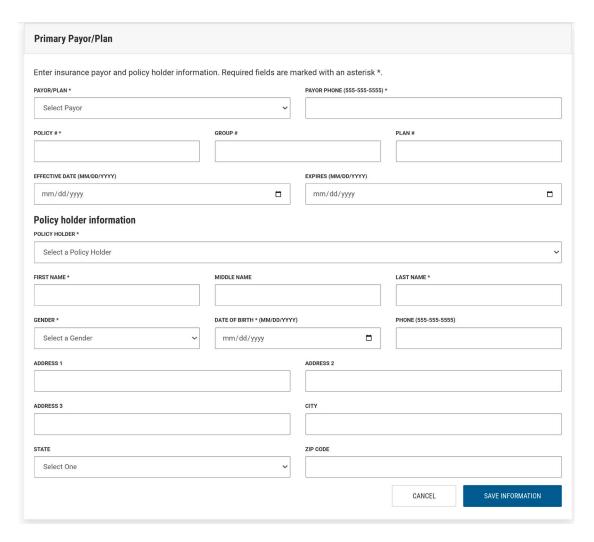
In the right pane, if the patient has existing primary or secondary insurance information, you can view, edit, or delete those details. If the patient does not have any existing primary or secondary insurance, you can add a new payor for either or both.

NOTE: Primary insurance is the only information required to submit an insurance order. Orders without primary insurance information will be billed back to the agency. Select the **Continue with Agency Order** button to progress to the cart without providing primary insurance information.



Add New Primary Insurance Information

- 1 On the Primary Insurance card, select **Add New Primary Payor** to access the primary insurance form.
- 2 Fields marked with an asterisk (*) are required to save primary insurance.

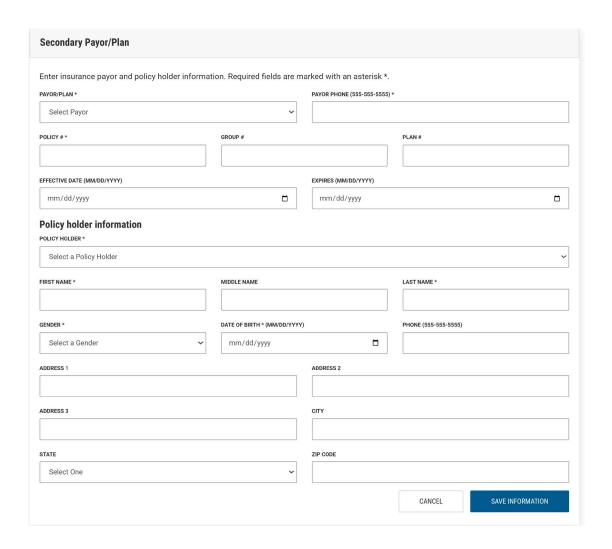


- From the **Payor/Plan** list, select an existing payor/plan or select **Add New Payor/Plan** if the correct payor/plan is not already in the list.
- From the **Policy Holder** list, select the designated policy holder. Selecting **Self** will automatically populate any applicable fields associated with the patient record.
- 5 Complete the required fields and select the **Save Information** button.

NOTE: Primary insurance is the only information required to submit an insurance order. Orders without primary insurance information will be billed back to the agency.

Add New Secondary Insurance Information

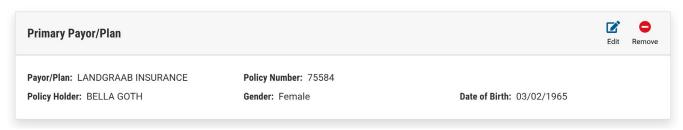
- On the Secondary Insurance card, select Add New Secondary Payor to access the secondary insurance form.
- 2 Fields marked with an asterisk (*) are required to save secondary insurance.



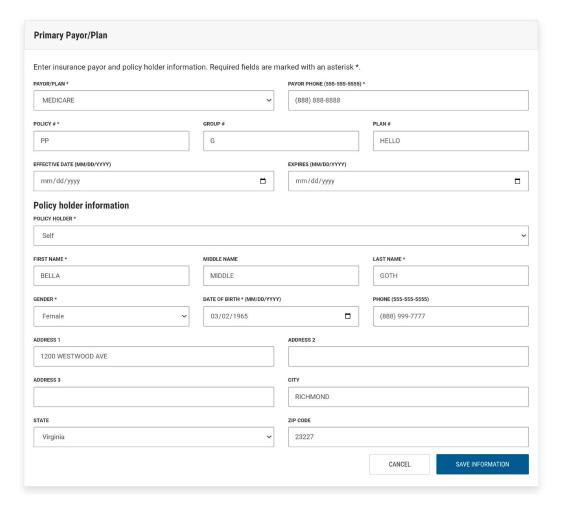
- From the **Payor/Plan list**, select an existing payor/plan or select **Add New Payor/Plan** if the correct payor/plan is not already in the list.
- From the **Policy Holder** list, select the designated policy holder. Selecting Self will automatically populate any applicable fields associated with the patient record.
- 5 Complete the required fields and select the **Save Information** button.

Edit Primary Insurance Information

1 On the Primary Payor/Plan card, select the **Edit** icon to access the primary insurance form.



2 Existing primary insurance information is automatically populated on the form.



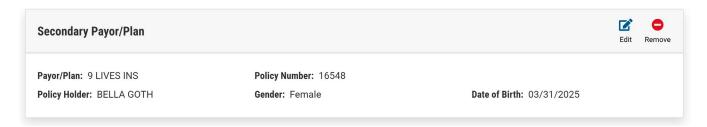
- Make any necessary edits, ensuring all required fields are complete.
- From the **Payor/Plan** list, select an existing payor/plan or select **Add New Payor/Plan** if the correct payor/plan is not already in the list.

- From the **Policy Holder** list, select the designated policy holder. Selecting **Self** will automatically populate any applicable fields associated with the patient record.
- 6 Complete the required fields and select the **Save Information** button.

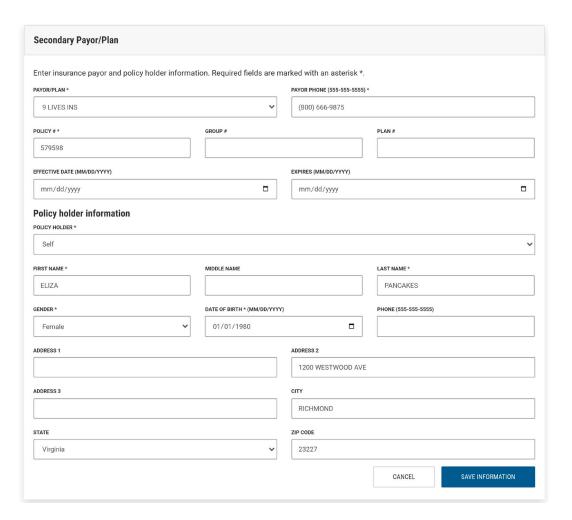
NOTE: Primary insurance is the only information required to submit an insurance order. Orders without primary insurance information will be billed back to the agency.

Edit Secondary Insurance Information

1 On the Secondary Payor/Plan card, select the Edit icon to access the secondary insurance form.



Existing secondary insurance information is automatically populated on the form.

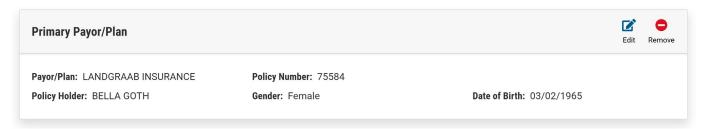


From the **Payor/Plan** list, select an existing payor/plan or select Add New Payor/Plan if the correct payor/plan is not already in the list.

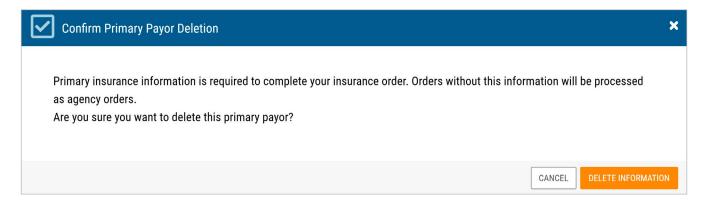
- From the **Policy Holder** list, select the designated policy holder. Selecting **Self** will automatically populate any applicable fields associated with the patient record.
- Complete the required fields and select the Save Information button.

Delete Primary Insurance

On the Primary Payor/Plan card, select **Remove** to remove existing primary insurance information from this order.

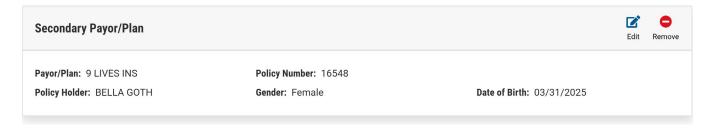


On the pop-up confirmation window, select the **Delete Information** button to confirm the deletion or the **Cancel** button to cancel out of the deletion.

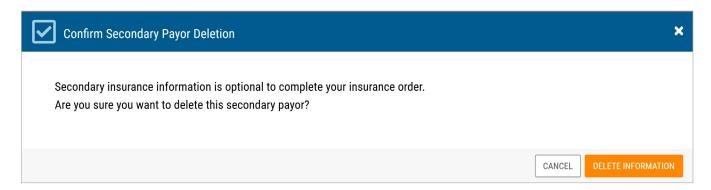


Delete Secondary Insurance

On the Secondary Payor/Plan card, select **Remove** to remove existing secondary insurance information from this order.



On the pop-up confirmation window, select the **Delete Information** button to confirm the deletion or the Cancel button to **cancel** out of the deletion.



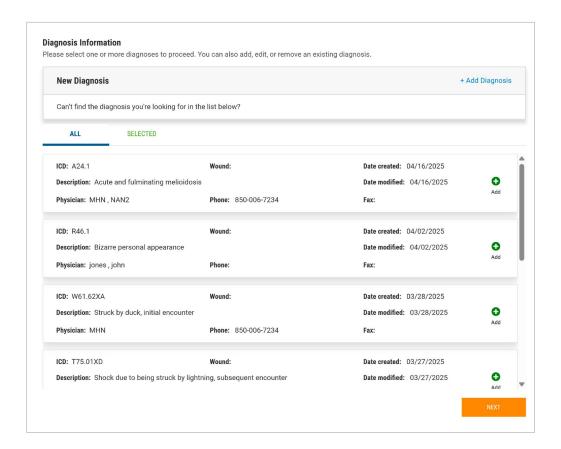
View Diagnosis Information

When you have completed providing primary and secondary insurance information, select the **Next** button to choose the diagnoses associated with the supplies in this order, or select **Diagnosis** from the left pane at any time.

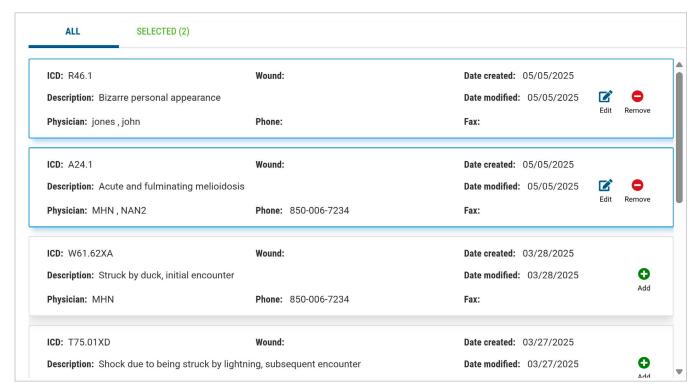
Any existing diagnoses associated with the patient are displayed on the Select Diagnosis page. If the patient does not have existing diagnoses, you can add them at this time.

NOTES:

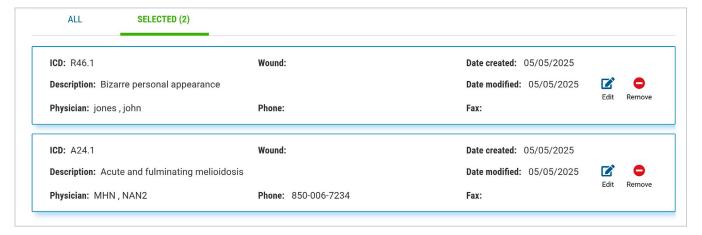
- Diagnosis information is not required to submit an insurance order, but it's strongly recommended that you provide as much detail as possible to avoid delays in insurance coverage verification.
- Any diagnoses added or removed apply to this order only. Diagnoses in the patient record can be added, edited, and deleted using the Patient Maintenance tool for those who have access.



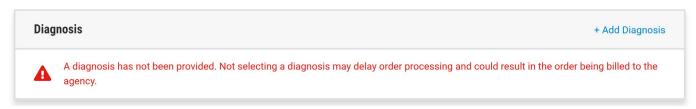
Select the Add icon to add an existing diagnosis to this order. Continue selecting the add icon to add multiple diagnoses to the order. Those diagnoses are marked as selected, moved to the top of the list, and highlighted.



2 The Selected tab shows only the diagnoses that have been selected for this order.



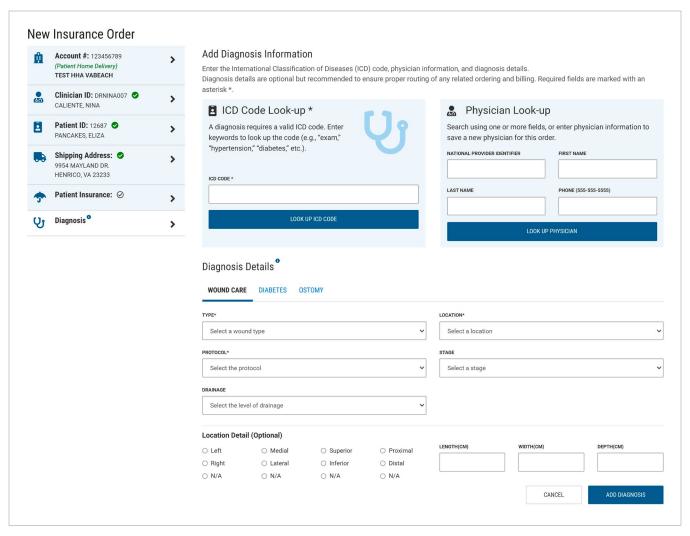
3 If there are no diagnoses associated with the selected patient, the following message is provided.



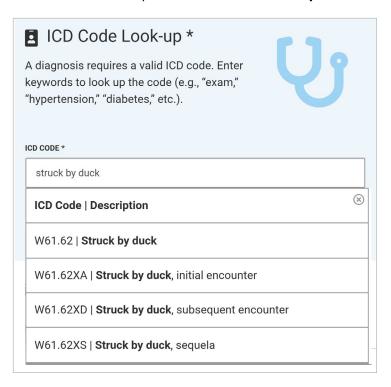
Add Diagnoses

If the patient has no diagnoses, or the correct diagnosis is not listed, you can add a new diagnosis.

- 1 Select + Add Diagnosis.
- On the Add Diagnosis page, ICD Code is the only required field. Diagnosis details provide additional information that may be helpful in processing the insurance order but is not required.

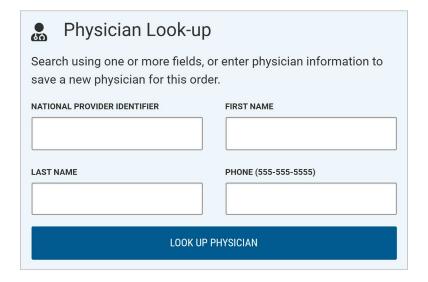


3 On the form, enter an ICD code or description and select the **Look Up ICD Code** button.



For Physician Look-up, you can select an existing physician or add a new physician. To select an existing physician, enter the physician's information and select the **Look Up Physician** button. To add a new physician, enter the physician's information, which will be saved when you select the **Add Diagnosis** button.

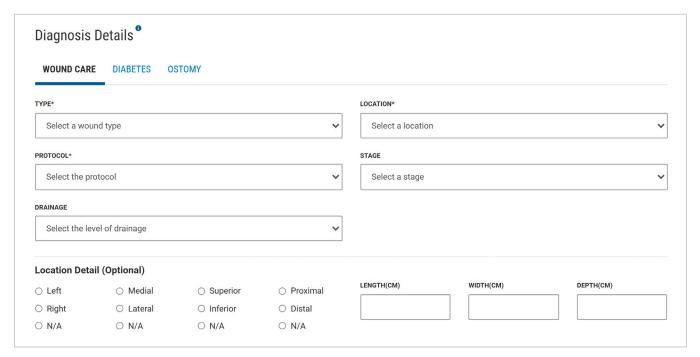
NOTE: National Provider Identifier (NPI) number is required to save a new physician.



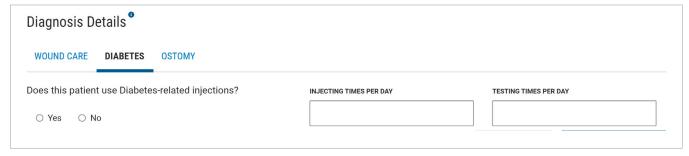
There are several tabs in the Diagnosis Details section you can use to provide additional details about the diagnosis that may be helpful in determining insurance coverage verification. You're encouraged to enter as many details as possible, but it is not required to save the new diagnosis. You can enter additional details for the following: Wound Care, Diabetes, Ostomy.

NOTE: If you would like to enter wound care details, the following fields are required to save the diagnosis:

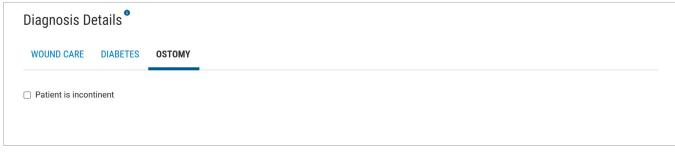
- Type
- · Location
- Protocol



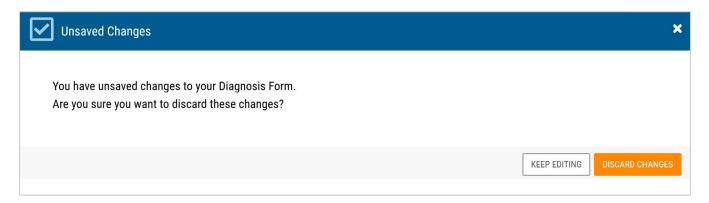
Wound Care tab



Diabetes tab



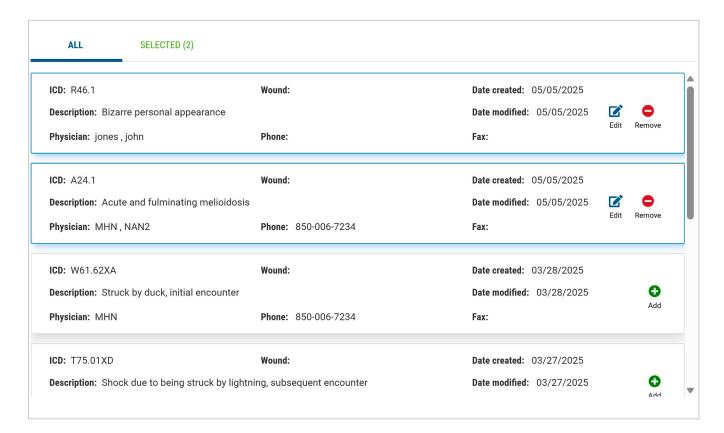
- 6 When you have completed your edits, select the Save Diagnosis button.
- If you have not made any changes and select the **Cancel** button, you will return to the Select Diagnosis page. If you have made changes and select the **Cancel** button, on the pop-up confirmation window, select **Keep Editing** to return to the Edit Diagnosis page, and select **Discard Changes** to return to the Select Diagnosis page without saving any edits you have made.



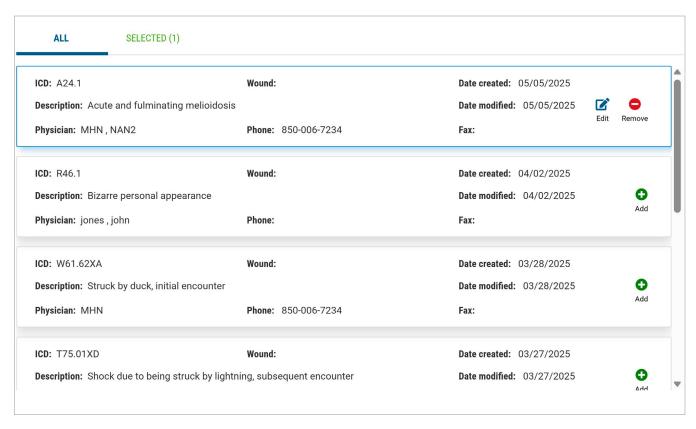
Remove Diagnosis

If you have selected a diagnosis to associate with this order that is no longer applicable, you can remove it from the list of selected diagnoses.

On the Select Diagnosis page, select the **Remove** icon to remove the diagnosis from the order.

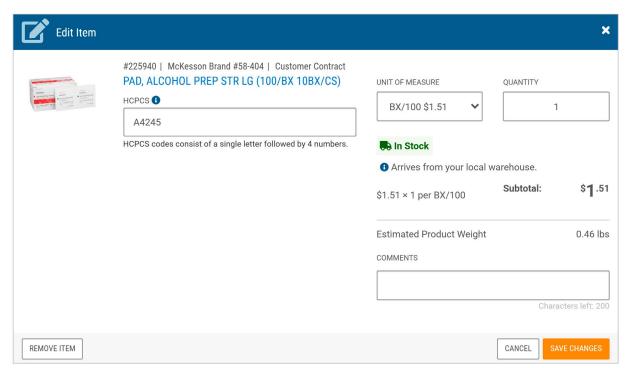


The removed diagnosis is no longer highlighted at the top of the list or shown on the Selected tab, confirming it has been removed from the order.

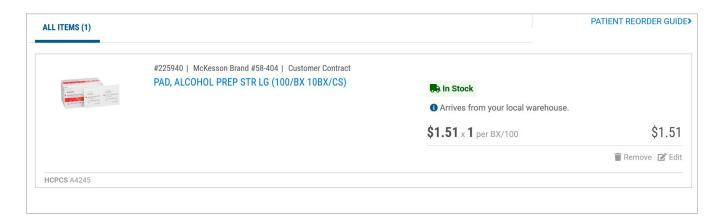


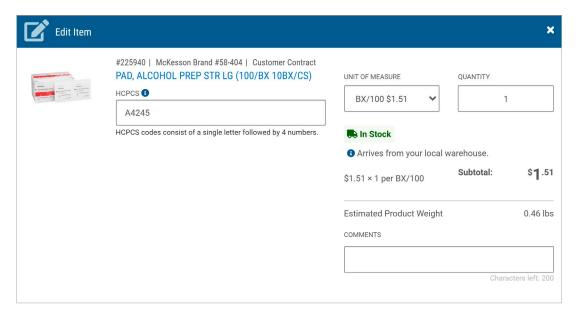
Edit HCPCS

On the Cart page, when adding an item to the cart using the **Quick Add** feature, the Add to Cart pop-up window provides the ability to edit the HCPCS code associated with the item.



You can also edit an item's HCPCS code in the Cart by selecting **Edit** on the card for that item to access the Edit Item pop-up window.





Checkout Messaging

During the checkout process, you'll have the opportunity to track the status of your insurance and diagnosis details, verify the accuracy of the information provided, and make any necessary edits to ensure everything is up to date.

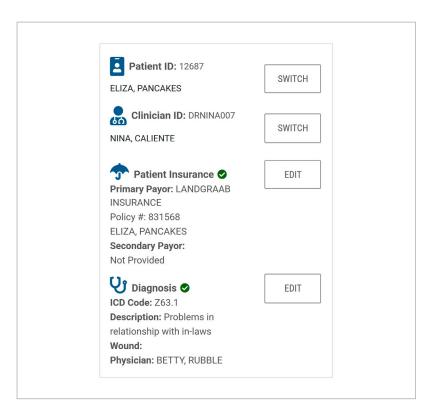
Cart Page

On the Cart page, in the right pane, messaging at the top of the page notifies you of the status of insurance and diagnosis information. This check only indicates whether information has been provided or not but does not verify the validity of the data entered.



In the left pane, you will see a summary of any insurance and diagnosis information associated with the order.

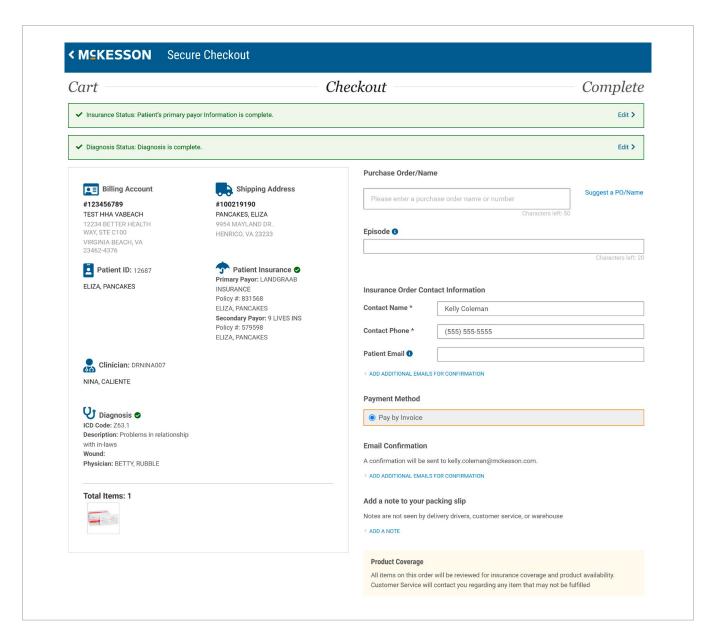
Select **Edit** from the status message or summary to make updates to insurance and diagnosis information.



Checkout Page

The Checkout page provides several features to support insurance ordering in this last step before placing the order.

- · Status messaging for insurance and diagnosis information
- · Summary of patient information entered for this order
- · The ability to add the patient's email address to keep them informed on the status of the order
- · Product Coverage message with information on the insurance ordering process





Select **Edit** from the status message to make updates to insurance and diagnosis information.

Order Successfully Completed Page

After placing the order, the Order Successfully Completed page provides a review of the insurance and diagnosis information on the order and the Product Coverage message.

