

ATS - Adding/Removing Secondary Insurance to Athletes in Bulk

Within ATS you have the ability to add your secondary insurance to all your athletes, or select group of athletes in bulk.

The first thing you need to do is select an individual athlete and add your secondary insurance policy to this athlete's profile. **Be sure to remember or write down the athlete you added this insurance entry to you, will need it later on in the process.*

Once you are in your chosen athlete's profile click on the Insurance Tab, then click "new" under the insurance menu.

The screenshot shows the 'Athlete - Crutch, Josh' profile page. The 'Insurance' tab is selected and circled. In the right-hand menu, the 'New' button under the 'Insurance' section is also circled. An arrow points from the text above to this button. The interface includes a top navigation bar with tabs like 'Injury', 'Medication', 'Notes/Staff/Msg', 'Concuss Evals', 'Medical History', 'General', 'Insurance', 'Emergency', 'eFiles & Docs', 'Additional Info', and 'Strength'. Below the tabs is a table with columns for 'Company', 'Type', 'Pay #', 'ID No', 'Group No', 'Insurance Phone', 'PCP', and 'PCP Phor'. A single entry is visible: 'All-n-One Insurance (Muddville PA)' with 'Medical - PPO' type and '99' pay #. At the bottom, there is a status bar with 'Kiosk: 02/13/19 10:25 AM', 'Portal: 02/13/19 10:25 AM', and 'Athlete ID: 369778'. A toolbar at the very bottom contains icons and buttons for 'Send Reg', 'New', 'Save', 'Remove', 'Search', and 'Close'.

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Once the Athlete Insurance Box loads fill in the required/desired information. Be sure to set the Payor # as 2.

Athlete Insurance - Crutch, Josh

Insurance Info **Card Front/Back**

Athlete: Crutch, Josh

Company: [Yellow Highlighted] Ins +

Insure Type: [Yellow Highlighted] Phone: []

Plan: []

Plan Type: [] Copay: []

ID #: []

Group #: [] Pre-Cert Required

Payor #: 2 Disable for Billing

Policy Start: / / CL

Policy End: / / CL

Deductible \$: [] or []

Policy Holder Information **Copy Athlete Info** **Self Insured**

Name: [] (First) [] (MI) [] (Last)

DOB: / / Gender: []

Street: []

C/S/Z: [] [] []

Phone: []

Policy Holder Relation: [] Signature on file

Employer Name: []

Email Address: []

PCP Info

Name: [] Phone: []

Notes: (Max 1000 Characters): []

Font View [] []

Actions

View Company New Save Remove Close

If you want to upload a picture of the insurance card with this entry click the Card Front/Back tab. You can load the front and back pictures separately or as one. Click in the Load Graphic button in the areas you choose. Be sure to save when you are finished.

Athlete Insurance - Crutch, Josh

Insurance Info **Card Front/Back**

FRONT

[]

Load Graphic

View

Clear

Size: 2" X 3"

BACK

[]

Load Graphic

View

Clear

Size: 2" X 3"

FRONT & BACK

[]

Load Graphic

View

Clear

Size: 2" X 6"

Notes: (Max 1000 Characters): []

Font View [] []

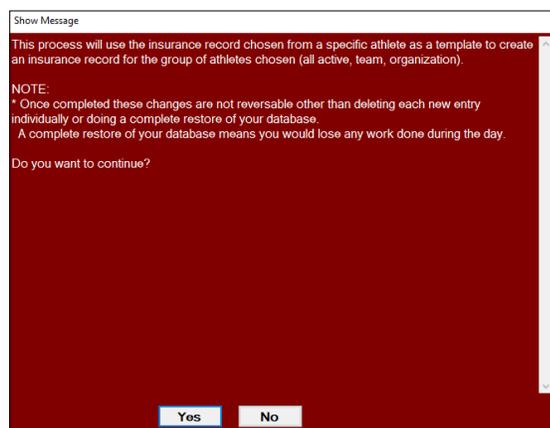
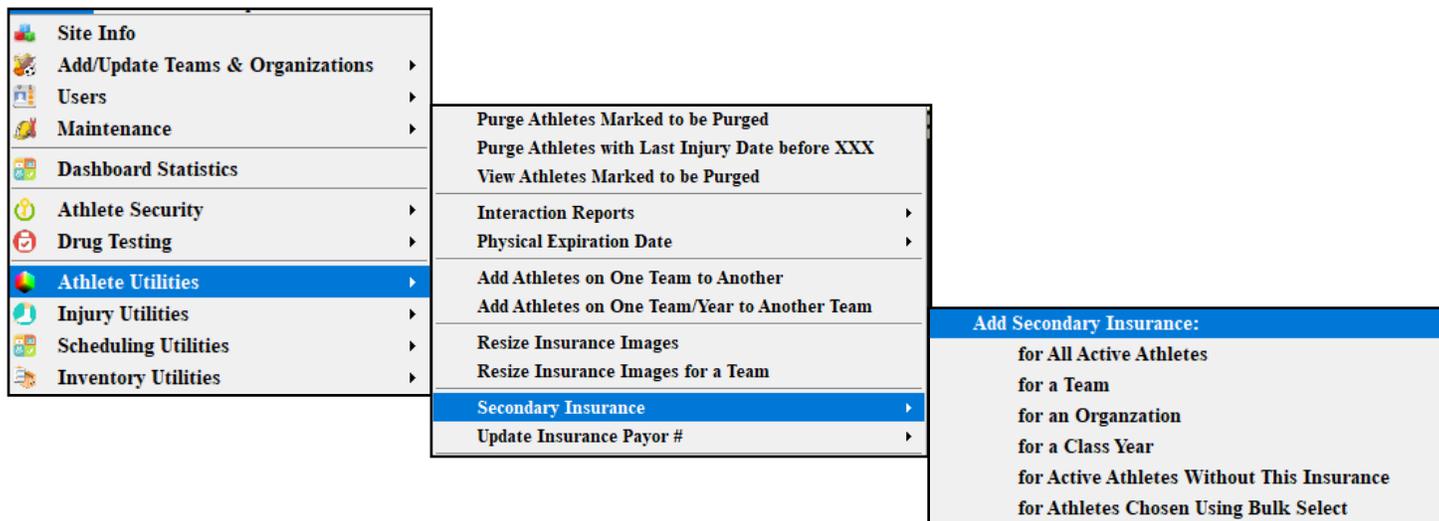
Actions

View Company New Save Remove Close

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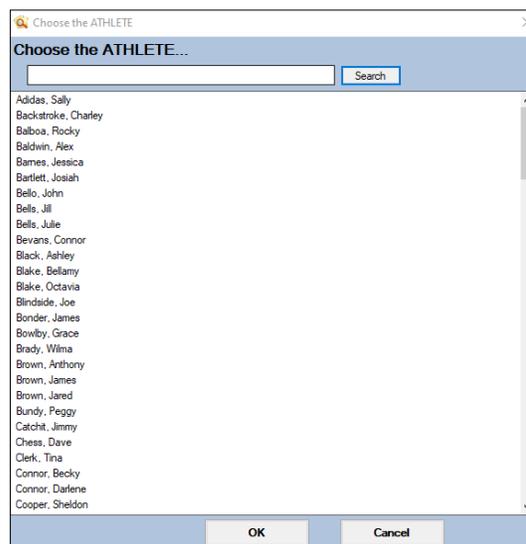
Now we will move on to adding your secondary insurance to your other athletes in bulk.

Go to admin—>Athlete Utilities—>Secondary Insurance—>Add Secondary Insurance:—> then make the appropriate choice.



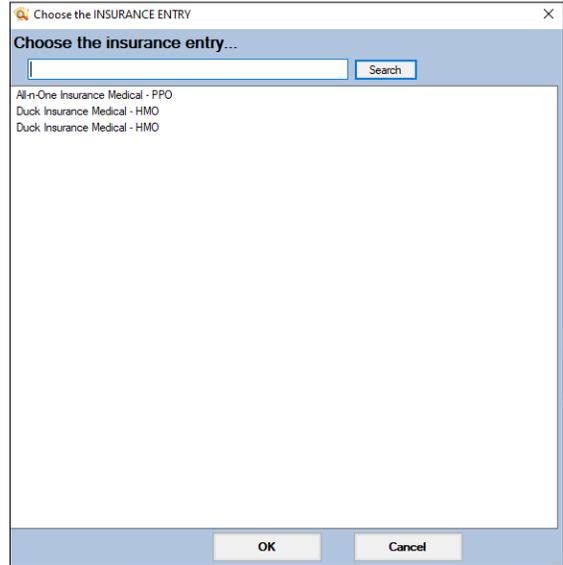
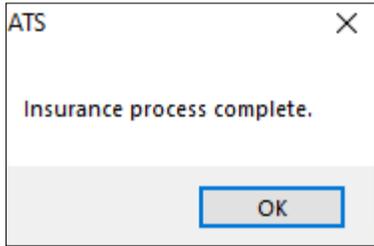
You will see a notice in a red box indicating that once this process is completed it cannot be undone. Click Yes to continue.

A list of your athletes will pop up, you need to select the athlete that you added the Insurance entry to in the previous step.

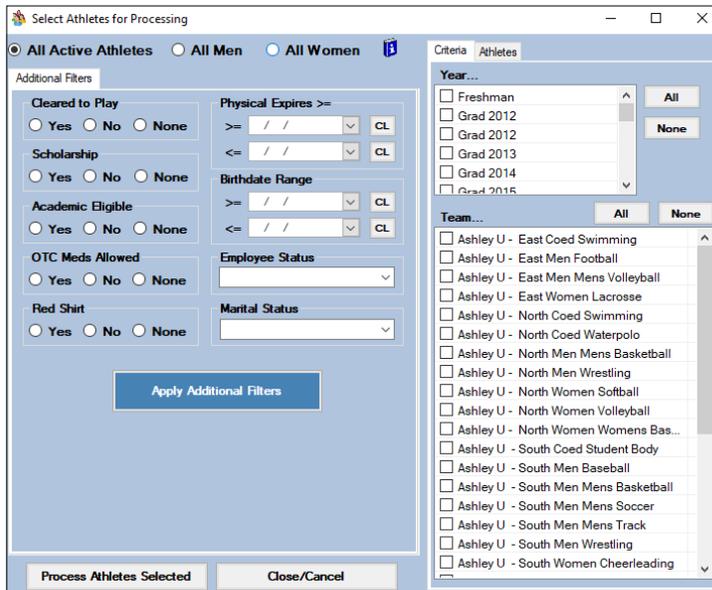
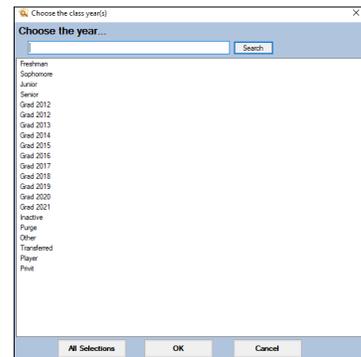
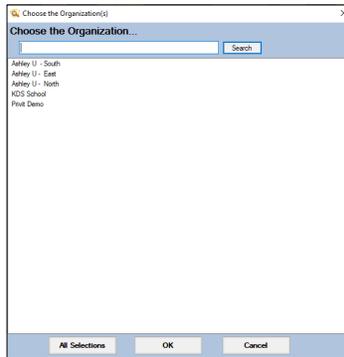


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Once you have selected your athlete, the next box to appear will be a list of the insurance company entries in that athlete's profile. Select the one that is your Secondary Insurance Company. You will see a notification when the process is complete.

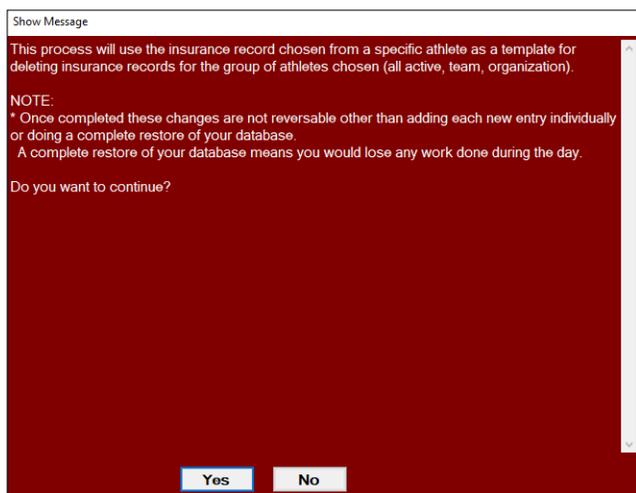
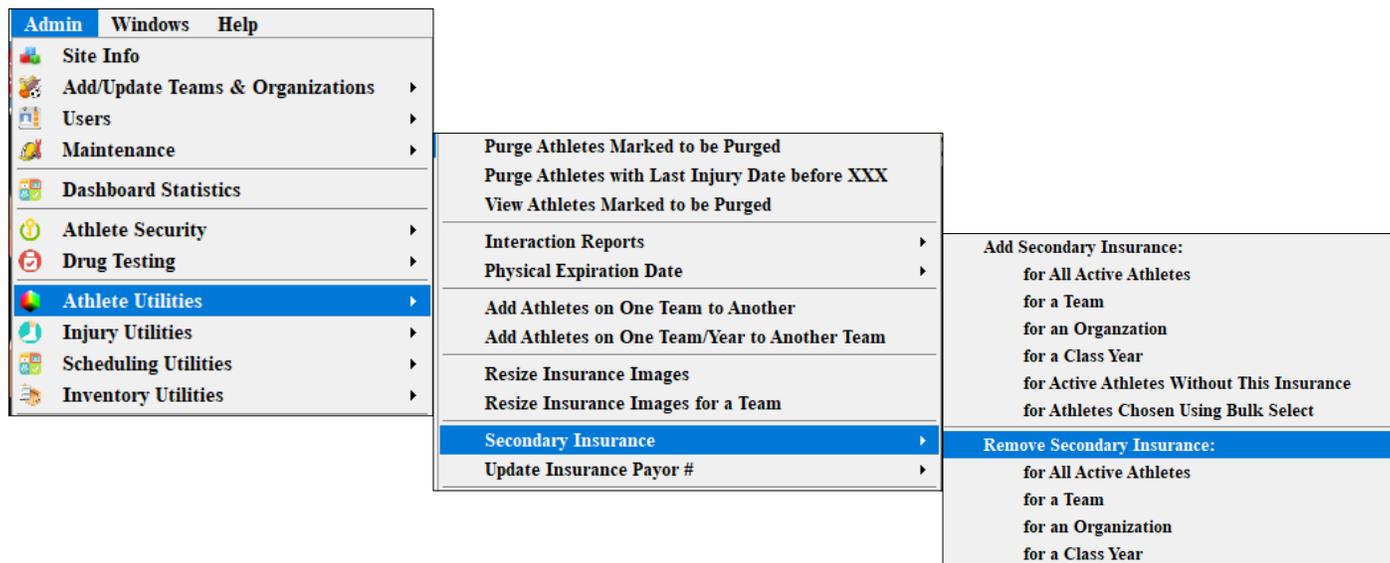


This process is the same for all of the "add" options, if you select any other than the all athletes option you will receive an additional prompt after the selection of the insurance entry based on what add option you chose: Team, Organization, Class Year, Athletes Without Active Insurance, or the Bulk Select option.



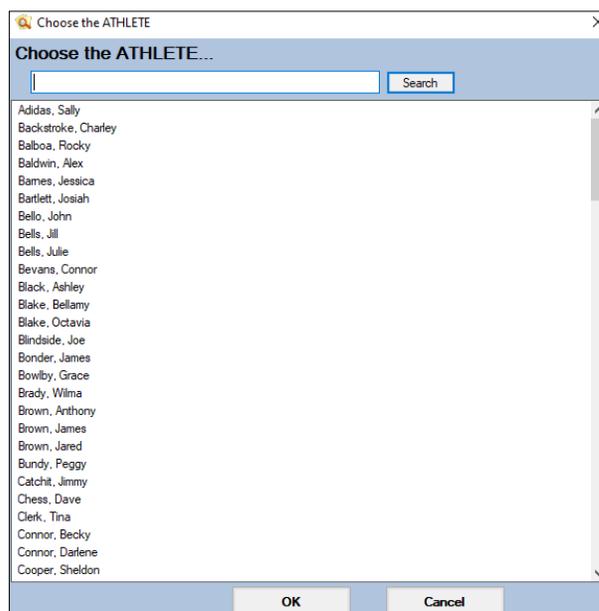
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You can remove Secondary Insurance Entries in bulk as well. Go to admin—> Athlete Utilities—>Secondary Insurance—> Remove Secondary Insurance—> then make the appropriate choice.



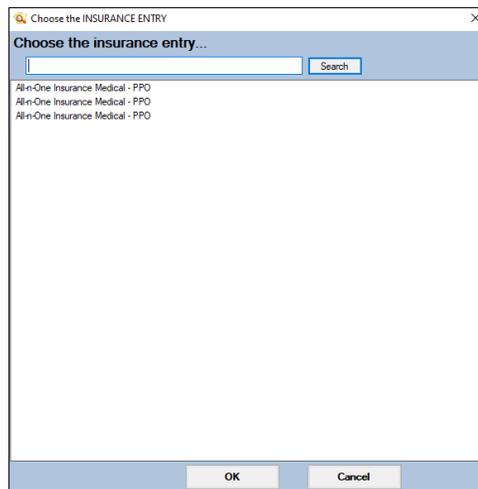
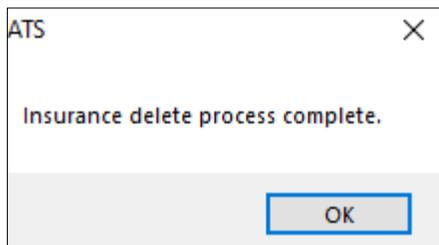
You will see a notice in Red box indicating that this process cannot be undone. Click Yes to continue.

You will then have to select an athlete that you know has the secondary Insurance entry in their athlete profile.



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Choose the correct insurance entry to be removed. You will see a notice when the process is complete.



The "remove" process is the same for all the options, if you select for Team, Organization or Class year you will be prompted to make an additional selecting indicating this after you select your athlete and insurance entry that is to be removed.

