

## Add a Billing Alias/DOB/Sex to a Payer Plan

(Used when there is a mismatch between the client and payer demographics)

### Search the Client

Search: Coverage (Client)

- Choose New to enter a new plan OR Select the Plan Name link (Client Plans/top box)
- Select the Claim Information tab or the payer

### Update the alias/DOB/Sex

- Select the Override Client Details from Client Information check box
- Click Fetch from Client Information
- Edit the First and Last Name, DOB and sex
- Click Save and X
- **\*\*Note:** If any fields in the Billing Alias Client Information box are blank it will cause errors

### Client Plans

General	Claim Information	Copayment	Monthly Deductible	Custom Fields
<input type="checkbox"/> Override Claim Information from Coverage Plan		<a href="#">Fetch from Coverage Plan</a>		
<b>General Information</b>		<b>Claim Information</b>		
Plan Name	<input type="text"/>	Claims Address <input type="text"/>		
Electronic Claims Payer Id	<input type="text"/>			
Claim Office #	<input type="text"/>			
<b>Contact Information</b>		<b>Comments</b>		
Name	<input type="text"/>	<input type="text"/>		
Telephone	<input type="text"/>			
Fax	<input type="text"/>			
<b>Utilization Management Organization</b>				
Organization Name	<input type="text"/>	Claims Address	<input type="text"/>	
Contact Name	<input type="text"/>	Email Address	<input type="text"/>	
Telephone	<input type="text"/>			
Fax	<input type="text"/>			
Comments:	<input type="text"/>			
<b>Billing Alias Client Information</b>				
<input checked="" type="checkbox"/> Override Client Details from Client Information		<a href="#">Fetch from Client Information</a>		
First Name	<input type="text" value="First"/>	DOB	<input type="text" value="07/01/2023"/>	<input type="text"/>
Last Name	<input type="text" value="Last"/>	Sex	<input type="text" value="Male"/>	<input type="text"/>
Suffix	<input type="text"/>			