How do I change a patient's payor?

You can change this information on the patient's profile or when you import the patient. Changing payor information may adjust the eligibility and call schedules for the patient.

A check is performed every day to see if the patient is eligible for supplies. If the payor is changed, the system refers to the new payor's eligibility policy.

If the patient is in the middle of an active outreach cycle, the new schedule applies to the next cycle.

Step-by-step instructions

Edit payor details

1. From the Patient's profile, select the **Patient details** tab.
2. In the Payor details section, click **Edit**.
3. From the **Payor** list, select a payor and enter the member ID.
4. Click **Save**.
5. (Optional) If you want to update the patient’s insurance status, select **Verify insurance** and click **Yes, verify insurance**.
   Note: If you activate this feature, additional service fees apply. Insurance verification can take up to 24 hours. Once the status is known, it is displayed under **Last known status**.