Add Client Insurance Information

Last Modified on 07/13/2026 3:28 pm EDT

About

Client insurance information can easily be added in the**Client Insurance widget** on the Face Sheet. The information entered in the Client Insurance widget flows bidirectionally with NextStep Billing. The Client Insurance widget does not apply to external billing interfaces.

For Agencies that do not enter a client's insurance information via the Face Sheet, it can be added directly in NextStep Billing. Some fields only exist in Client Insurance from NextStep Billing that are not displayed in the widget on the Clinical side. More details can be found below.

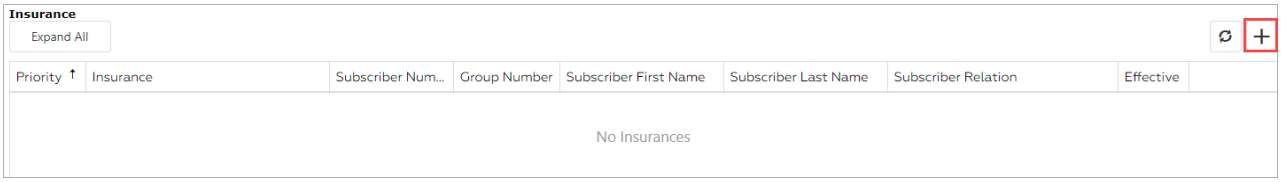
User Permission: The following Process Permission needs to be enabled to use this functionality**Add/Edit/Delete Client Insurance**.

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Add Client Insurance in the Client Insurance Widget on Face Sheet

Add the Client Insurance Record

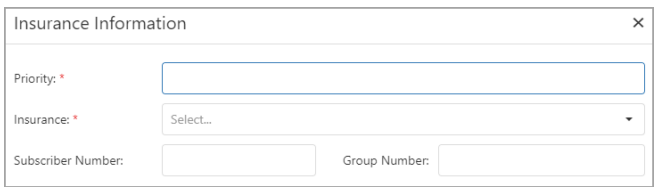
1. Navigate to the Face Sheet in NextStep Clinical:**Main Menu >Admissions Menu > Face Sheet.**
2. Search for and select the client if not already selected.
3. Click the **Edit** button.
4. Scroll down to the Insurance (Billing) widget.
5. Click the **Add** button to add a new insurance record.



6. Complete the **Insurance Information** section.

Notes:

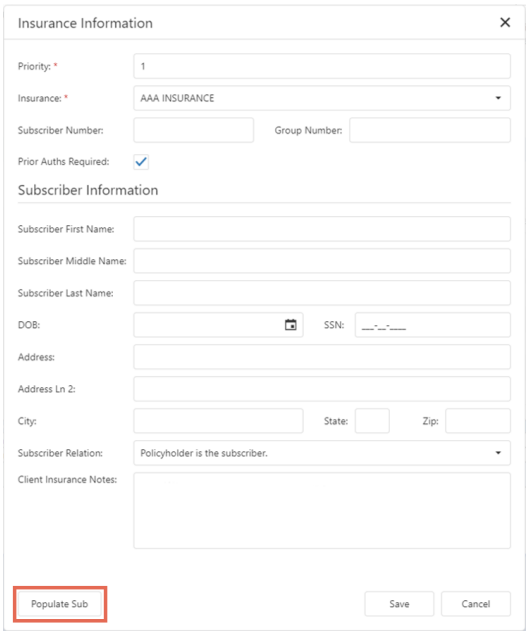
- **Priority** is a numerical field: 1= Primary, 2= Secondary, 3= Tertiary.
- Required fields are listed with a red asterisk, but it is recommended to complete all of the Insurance Information section so that you don't get a **Bill Status** that prevents you from converting Services into Line Items in the NSS Billing.



7. Click the **Populate Sub** button to pull in information from the Face Sheet for**Subscriber First Name, Subscriber Middle**

Name, Subscriber Last Name, DOB, SSN, Address, Address Ln 2, City, State, and **Zip**. If the subscriber is not the client, change the appropriate fields as necessary.

> **Note**: The information populated pulls from the Permanent Residence fields on the Face Sheet. If there is no data in the Permanent Residence field, the information is pulled from the Current Residence fields. If you ever update the client's information on the Face Sheet, it does not automatically update these fields, you must click **Populate Sub** again to bring that data into the Insurance Information window.



8. Change the **Subscriber Relation to Client**, if necessary.
9. Enter any **Client Insurance Notes**, if necessary.
10. Click the **Save** button.
11. The information is sent to NSS Billing. To add additional client insurance details in NSS Billing, navigate to the Client Insurance Form within the NSS Billing: **Navigation Form > Client Insurance** and search for and select the client and follow steps 11-13 in **Add Client Insurance in NSS Billing**.

> **Note**: An entry for Self Pay will auto-generate unless your Agency decides to disable this functionality. If the client uses Self Pay, skip to the "Add Ability to Pay (Self Pay/Private Pay)" section to complete the record.

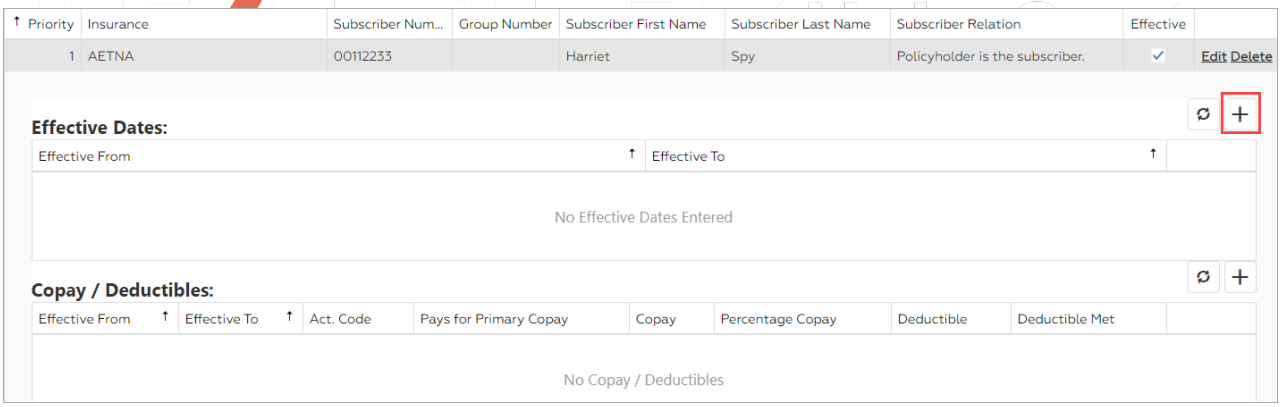
Add the Effective Dates and Copay/Deductible (Non-Private Pay)

> **Disclaimer**: If the Insurance is NOT a Private Pay insurance, then you will be able to add the Effective Dates for the Insurance record, and the client's **Copay and Deductible**. Continue with this section to complete Adding the Insurance Record.

1. Back in the Insurance (Billing) widget, click the carrot to uncollapse the**Insurance** record you just added to display the Effective Dates and Copay/Deductibles sections. Or, click the **Expand All** button to expand all insurance records.



2. Under Effective Dates, click the **Add** button to add effective dates for the insurance and click the**Save** button.



3. Under Copay / Deductibles, click the **Add** button to add Copay and Deductible information and click the **Save** button.
4. The information is sent to NSS Billing. To add additional client insurance details in the NSS Billing, navigate to the Client Insurance Form within NSS Billing: **Navigation Form > Client Insurance** and search for and select the client and follow steps 11-13 in **Add Client Insurance in NSS Billing**.

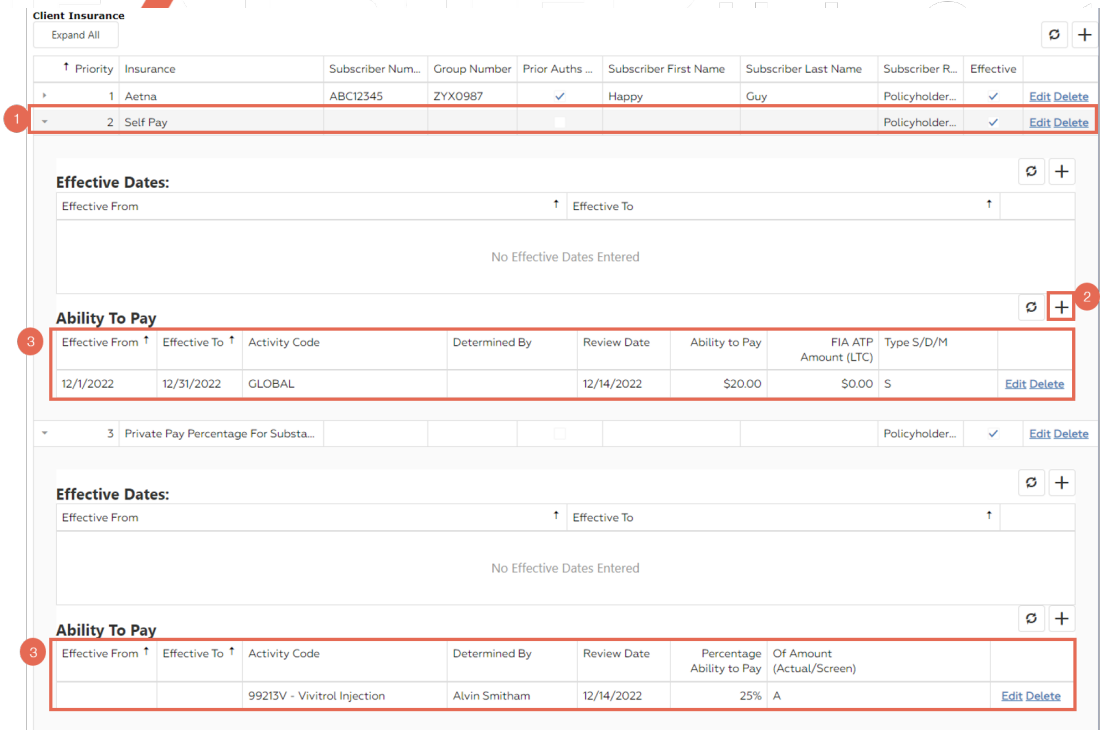
Notes:

- If you do not select a specific Activity Code from the **Act. Code** drop-down menu, the Copay/Deductible information will be Global.
- Marking a client's Insurance as requiring Prior Authorization is done within NSS Billing.
- If you add the expected copay here before the Service is converted into a billable Line Item, when you go to apply the credit a Line Item can be found for the copay. If this field is empty or within the Client Insurance record in NSS Billing then a Line Item for the copay will be generated once you post the ERA.

Add Ability to Pay (Self Pay/Private Pay)

Disclaimer: If the Insurance is a Self Pay/Private Pay insurance, then you will be able to add the Effective Dates for the Insurance record, and the client's **Ability to Pay**. Continue with this section to complete Adding the Insurance Record.

1. Back in the Insurance (Billing) widget, click the carrot to uncollapse the Self Pay/ Private Pay **Insurance** record to display the Effective Dates and Ability to Pay sections. Or, click the **Expand All** button to expand all insurance records.
2. Under Ability to Pay, click the **Add** button.



3. Enter the information in the new row (the image above shows both options for adding Ability to Pay information, and what you see will depend on the Party Type of your Self-Pay/Private Pay Insurance):
    - **Effective From**: Optional
    - **Effective To**: Optional
    - **Activity Code**: Select an individual Activity Code to document the client's ability to pay for that specific code, or select Global for all.
    - **Determined by**: Optional, can select from a list of the billers in your agency.
    - **Review Date**: Today's date.
    - If Self Pay is marked as Party Type 5 in your NSS Billing, you will see and be able to complete the following (top section of image):
        - **Ability to Pay**: Enter an amount. This is the amount that is charged for the service.
        - **FIA ATP Amount (LTC)**: Optional; enter an amount here.
        - **Type S/D/M**: Select from a drop-down. S is selected by default.
    - If Self Pay is marked as Party Type 8 in your NSS Billing, you will see and be able to complete the following (bottom section of image):
        - **Percentage Ability to Pay**: Enter a percentage.
        - **Of Amount (Actual/Screen)**: Select A or S.
    - **Adjustment Note**: Select from a drop-down. This shows the adjustment notes that have been configured in your NSS Billing.
4. When finished, click **Save**.
5. The information is sent to NSS Billing. To add additional client insurance details in NSS Billing, navigate to the Client Insurance Form within NSS Billing: **Navigation Form > Client Insurance** and search for and select the client and follow steps 11-13 in **Add Client Insurance in NSS Billing**.

Add Client Insurance in NextStep Billing

1. Navigate to the Client Insurance Form within the NSS Billing: **Navigation Form > Client Insurance**.
2. In the **Case No.** field, type the client's case number or click the **Search** button to search for the client.
3. Click the **Edit Insurance** button.
4. Click the **Add** button.
5. Enter the client's insurance information: **Priority, Insuring Party, Subscriber Number, and Group Number**

Note: **Priority** is a numerical field: 1= Primary, 2=Secondary, 3=Tertiary.

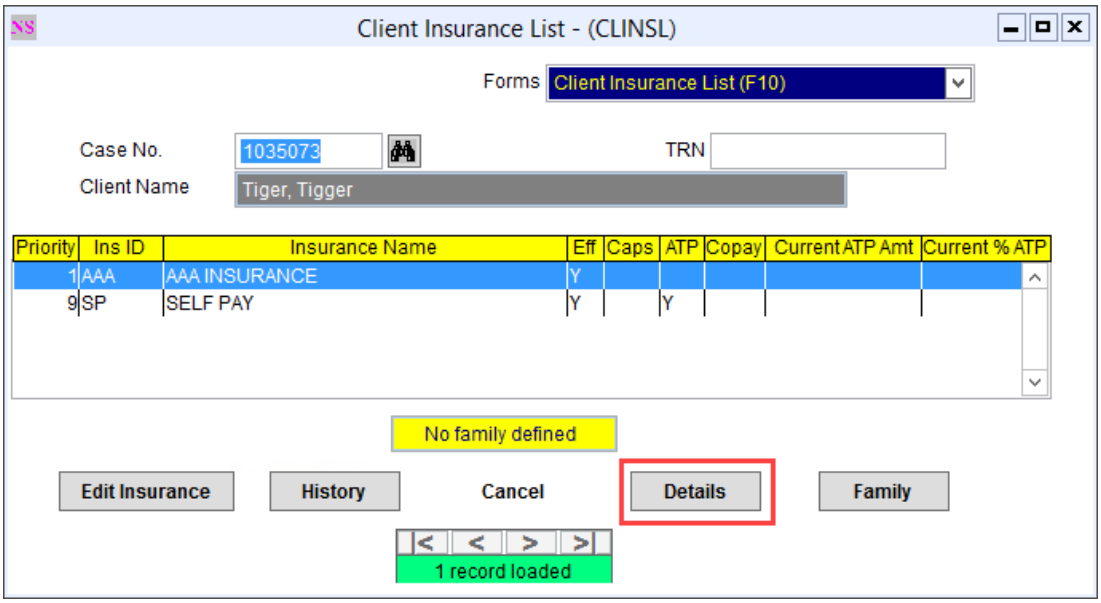
6. Click the **Populate Sub** button to bring over demographics from NSS:**Subscriber Name, Address, Phone, Social Security No., and Birthdate**.
7. Change the **Subscriber Name** if it doesn't match the name brought over from Populate Sub.
8. Change the **Subscriber Relation to Client,** if necessary.
9. Add any other information pertinent to your Agency workflow on Page 1 and Page 2.

Note: To mark a client as needing prior authorization, select the**Prior Authorization Required?** checkbox on Page 2 if this is not already set at the insurance level. This can be completed on Page 3 for Agencies that use Virtual Private Office (VPO).

10. Click the **Save** button.

Note: An entry for Self Pay will auto-generate unless your Agency has this functionality disabled.

11. In the Client Insurance List, select the**Insurance** you would like to add coverage-specific details to.
12. Click the **Details** button. The Client Insurance Details List is displayed.



13. Complete the following areas if applicable to your Agency's workflow:

- **Edit Effective Dates:** Add the **Effective From** and **Effective To** dates for the client's insurance coverage. If both effective dates are left blank, the system assumes the insurance is active. If this information was added via the Face Sheet, it would be displayed here.
- **Edit Caps:** Most Agencies add and manage Authorizations in NSS via the Authorization Tracker widget and the details are displayed here. The information will transfer from Clinical into NSS Billing once it's been "confirmed to billing" in the Authorization Tracker. If any changes are made to Authorizations in NSS Billing the changes **do not** transfer to NSS.
- **Ability to Pay (ATP)**: ATP is only applicable to SELF PAY. This is the maximum out-of-pocket amount that the client can pay for either all Services if the Activity Code is left blank or an individual Service for a specific Activity Code (e.g.: Group Therapy Activity Code charges $25, but for this particular client their ATP is $10. NSS Billing will show a charge of $25, write-off $15, and include the Adjustment Note that you selected in the Client Insurance Ability To Pay Schedule Form).
- **Activity Code**: This section is for individual Activity Code controls at the client insurance level. You can set a Screen amount for reporting purposes, if necessary. If the Bill Screen - ATP checkbox is selected, it will take the Screen amount

and use it as a billed amount override. A Modifier can also be set at the client level from here. This section of insurance details is not commonly used.

- **Edit Copay/Deductible**: Add **Copay** and **Deductible** information. If an Activity code is not selected from the Activity Code ID, the Copay applies globally meaning that anytime a charge went through to the payer, there would be a copay for the client. If this information was added via the Face Sheet, it would be displayed here.

> **Note**: If you add the expected copay here before the Service is converted into a billable Line Item, when you go to apply the credit a Line Item can be found for the copay. If this field is empty then a Line Item for the copay will be generated once you post the ERA.

- **Activity Code Exclusion**: Insurance is not billable for the client for any Activity Codes listed here. If one of the Activity Codes listed here is used, it will generate a **Bill Status 109** when trying to convert the Service to a Line Item.
- **Diagnosis Billable**: If a client's insurance will only cover specific diagnoses, you can add them here. If you try to bill with a primary diagnosis other than what is listed here, it will generate a **Bill Status 119** when trying to convert the Service to a Line Item. This field is not commonly used.
- **Place of Contact Exclusion**: If a client's insurance does not cover a specific place of contact, you can add that here. If you try to bill with a place of contact that is in the list, it will generate a **Bill Status 120** when trying to convert the Service to a Line Item. This field is not commonly used.