

Adding Insurance: Step by Step Instructions

9 Steps [View most recent version on Tango.us](#) 

Created by

Progress Counseling Group

Creation Date

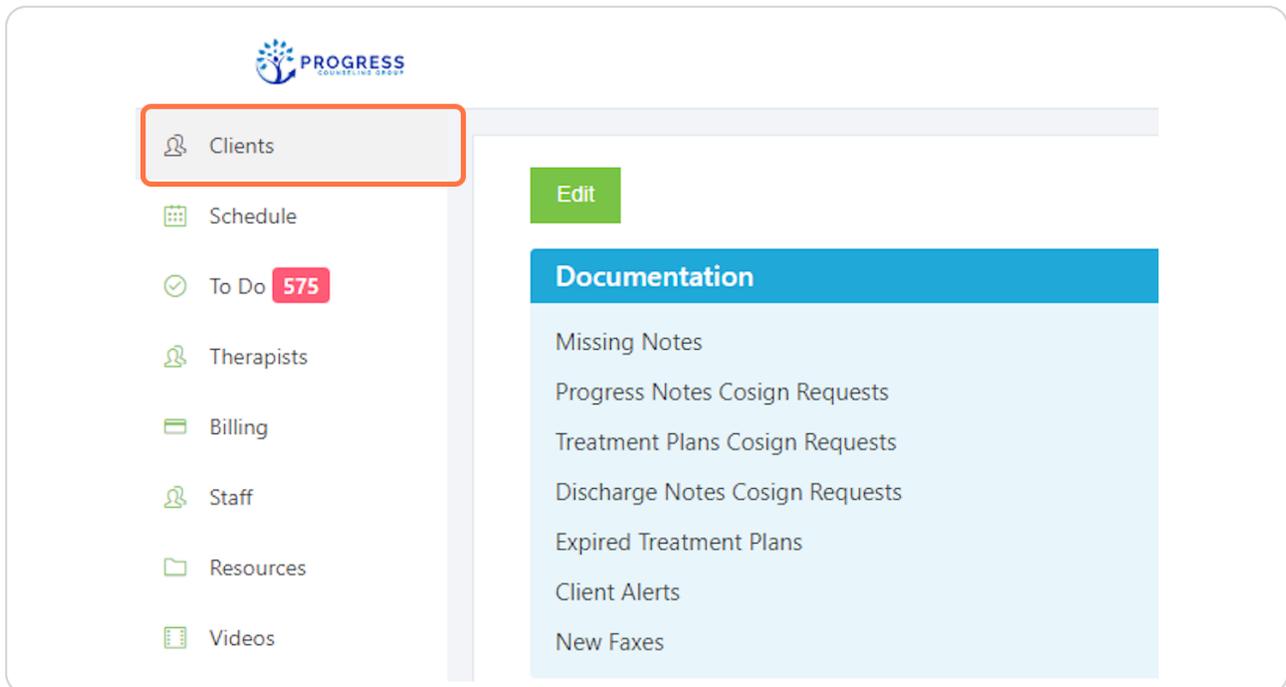
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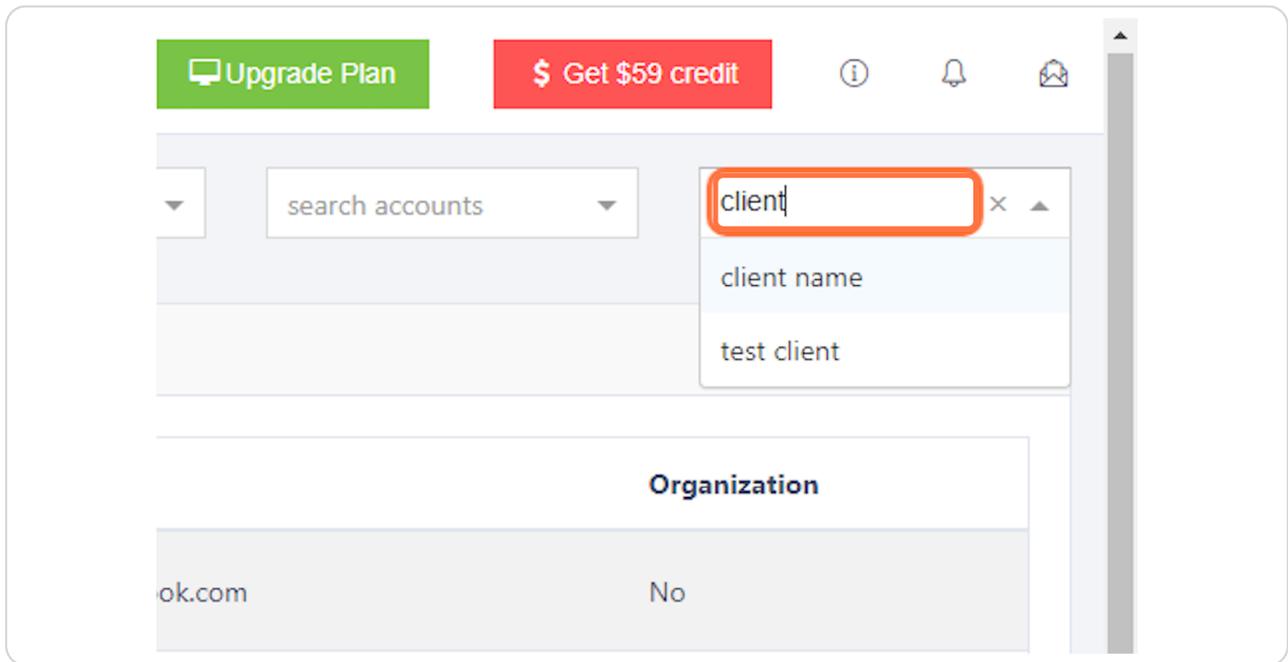
STEP 1

Click on Clients



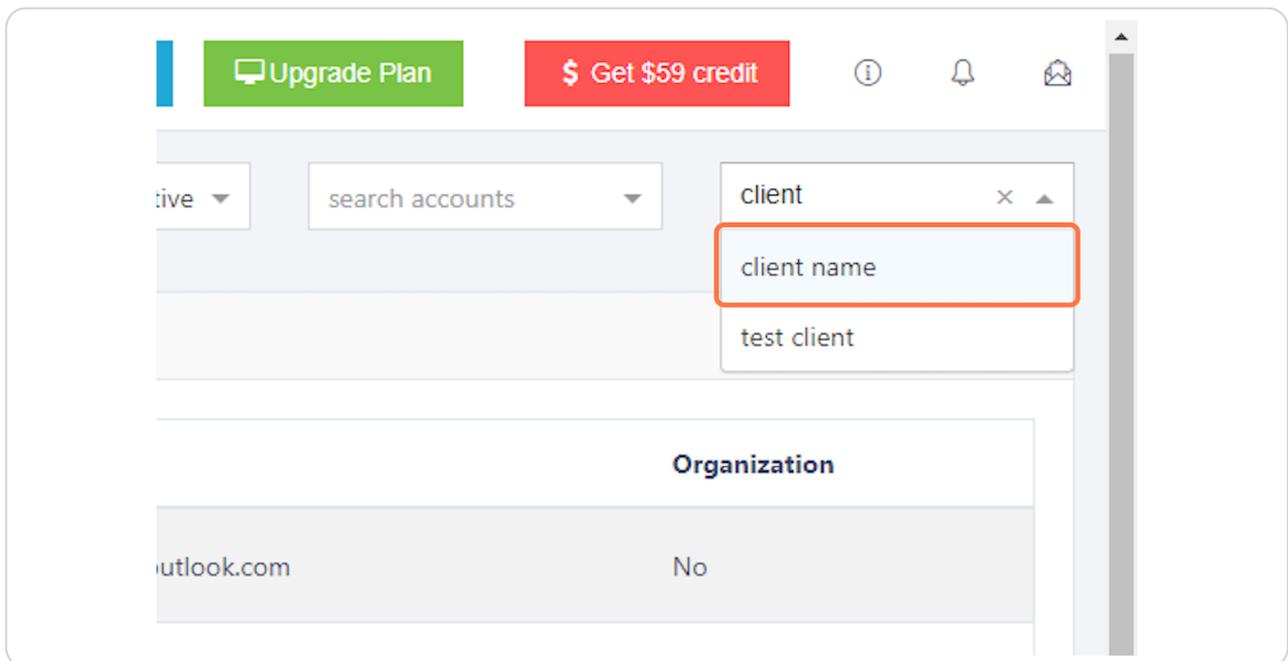
STEP 2

Click on "Search Clients"



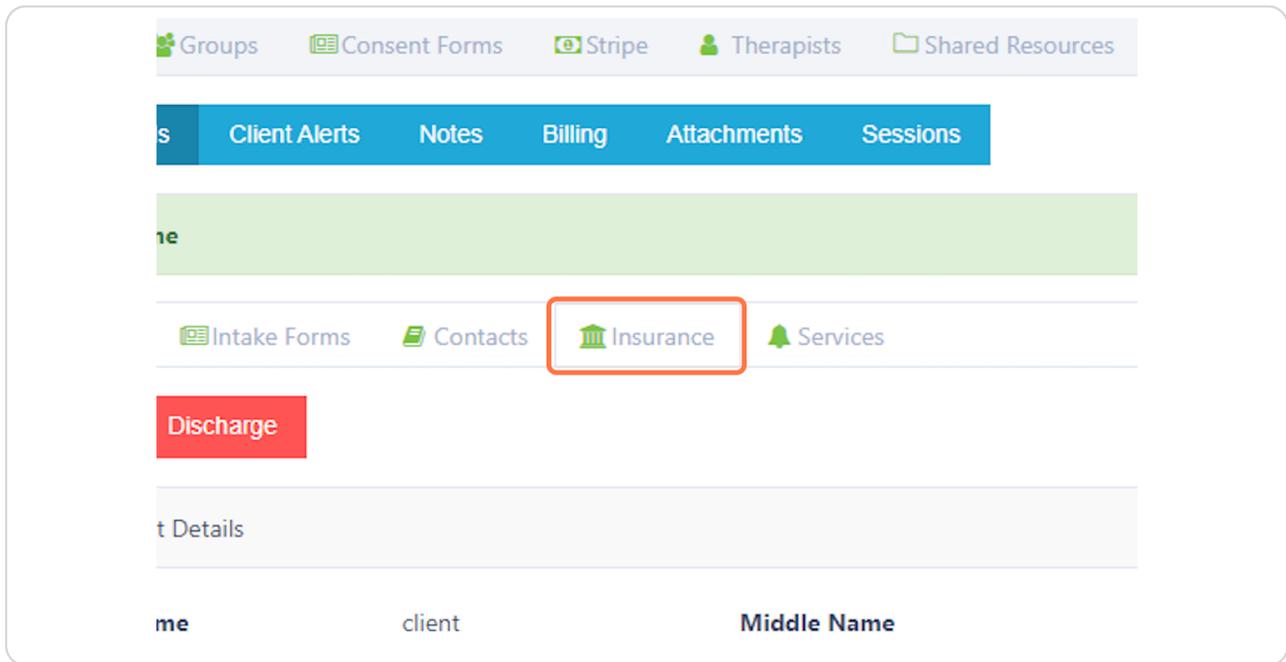
STEP 3

Select Client



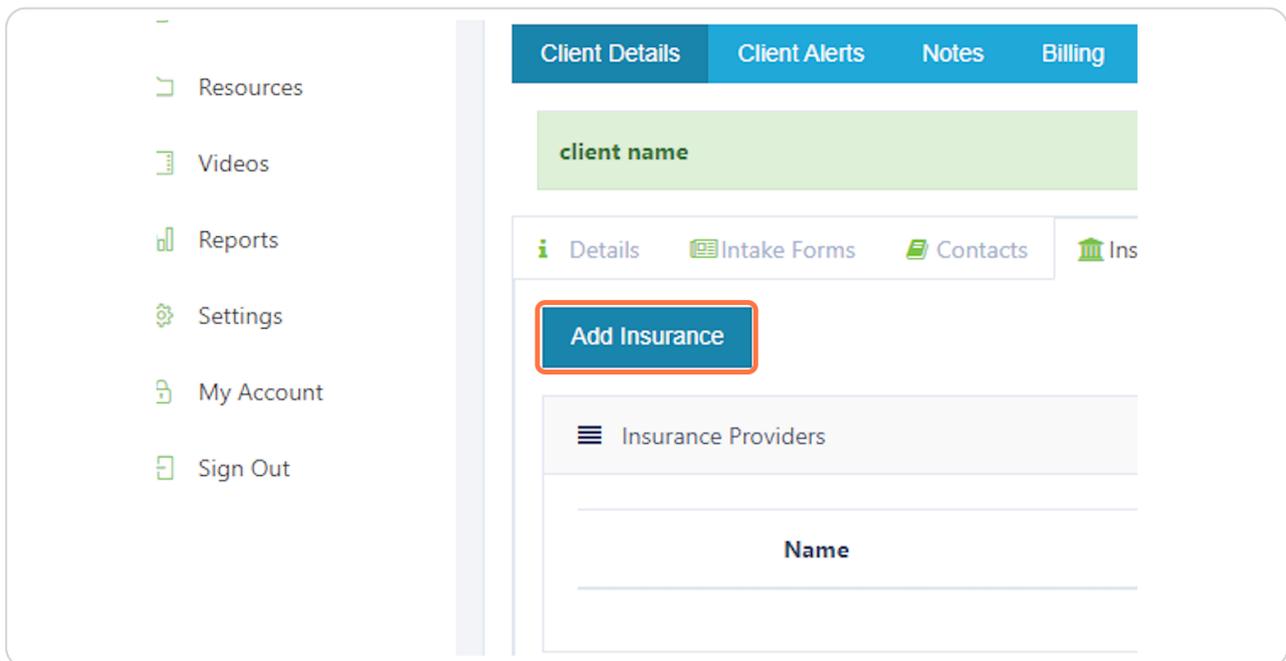
STEP 4

Click on Insurance tab



STEP 5

Click on Add Insurance



STEP 6

Click on dropdown

The screenshot shows a modal window titled "Insurance Details" with a close button (X) in the top right corner. The form contains the following fields:

- Insurer:** A dropdown menu with "OTHER" selected and highlighted by a red border.
- Insurance Type:** A dropdown menu with "Commercial" selected.
- Is Primary:** A toggle switch that is turned on (blue).
- Is Disabled:** A toggle switch that is turned off (grey).
- Relation to insured:** A dropdown menu with "Self" selected.
- Insured Id:** A text input field with the placeholder "Enter Insured Id..".
- Plan Name:** A text input field with the placeholder "Enter Plan Name..".

Below the form fields, there is a red error message: "Insured Id is required." and a blue instruction box: "Provide either Policy Id or Group Id. If there is no Policy Id or Group Id leave both fields blank. Do not enter".

STEP 7

Select Correct Insurance

The screenshot shows the same "Insurance Details" modal window. The "Insurer" dropdown menu is now open, displaying a list of insurance providers. The list includes:

- OTHER
- FREEDOM HEALTH PLAN
- GOVERNMENT EMPLOYEES HEALTH ASSOCIATION (GEHA)
- AETNA INSURANCE COMPANY
- CIGNA BEHAVIORAL HEALTH** (highlighted with a red border)
- RESOURCEONE ADMINISTRATORS
- AMBETTER

The other fields in the form remain the same as in Step 6. The red error message and blue instruction box are also present.

STEP 8

Enter Member/Insured ID

Insurer: CIGNA BEHAVIORAL HEALTH

Insurance Type: Commercial

Is Primary:

Is Disabled:

Relation to insured: Self

Insured Id: 123456789

Plan Name: Enter Plan Name..

Provide either Policy Id or Group Id. If there is no Policy Id or Group Id leave both fields blank. Do not enter Plan Name if you provide Policy Id or Group Id.

Policy Id: Enter Policy Id..

Group Id: Enter Group Id..

Insurance Phone:

STEP 9

Click on Save Changes

Close Save Changes

Tango

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