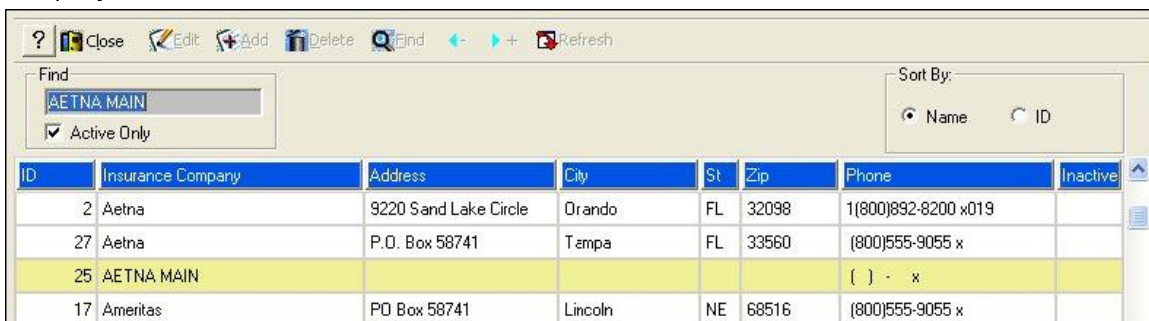# SoftDent Software

Setting Up Umbrella Insurance Companies

This two-page job aid is designed for all front office team members and lists the steps required to add umbrella insurance companies in CS SoftDent practice management software. Umbrella companies are helpful when posting bulk insurance payments to multiple insurance companies. This job aid provides steps for creating an umbrella insurance company and for linking new and existing insurance plans to that company.

Adding an Umbrella Insurance Company

1. Open the **Insurance Company List** window.
2. Click the **Add** button.
3. Add a new insurance company record and name it the same as the company name followed by a generic, capitalized identifier such as "MAIN, MASTER, or BULK". See Figure 1.

NOTE: It is not necessary to enter any other information in the **Insurance Company** window of an umbrella company.
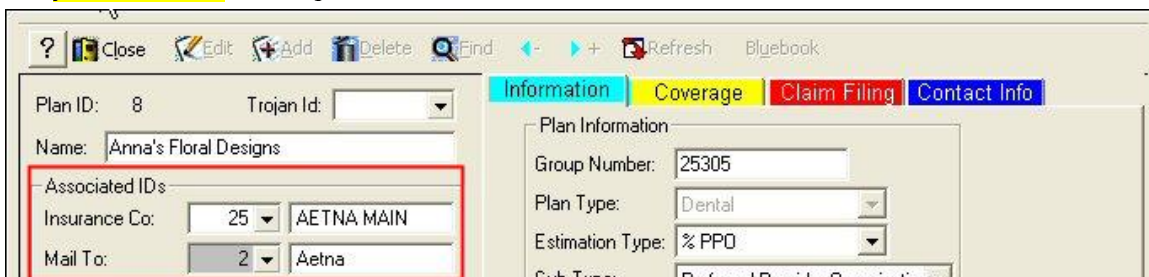

Figure 1 - Insurance Company List Window

Linking an Insurance Plan to an Umbrella Insurance Company

1. Open an **Insurance Plan** window.
2. Click the **Insurance Co:** field drop-down arrow and select the umbrella insurance company from the list. See Figure 2.
3. Click the **Mail To:** field drop-down arrow and select the insurance company with the address to which you mail claims. See Figure 2.

Figure 2 - Insurance Plan Window

Linking Existing Plans to Umbrella Insurance Companies

Linking umbrella insurance companies to existing insurance plans is helpful when posting bulk checks from companies that send checks from one central location, but have multiple locations to which claims are submitted.

1. From the **Insurance Company List** window, type the name of the insurance company in the Find field.(i.e. Aetna)

NOTE: If you have several listings for the insurance company, you will need to repeat the following steps for each one.

2. From the Express bar, select **Show Ins Plans**.

3. Highlight the insurance plan and click **Edit**.

4. In the **Insurance Plan** window, click the **Insurance Co:** field drop-down arrow and select the umbrella insurance company from the list. See Figure 2.

5. Click the **Mail To:** field drop-down arrow and select the insurance company with the address to which you mail claims. See Figure 2.

6. Click **Ok** to save.

7. Click **Close** at the top of the **Insurance Plan** window.

8. Follow these steps for each insurance plan listed for this company.