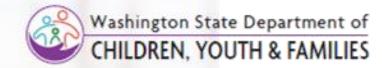


Completing the Funding Sources Tab

This guide covers how to identify Funding Sources from within a child's record.

Disclaimer: This training aims to enhance the knowledge, skills, and proficiency in using ACORN as it relates to Early Support Services and should not substitute required programmatic training. The information presented in this content reflects the system build at the time of training.



New Policy

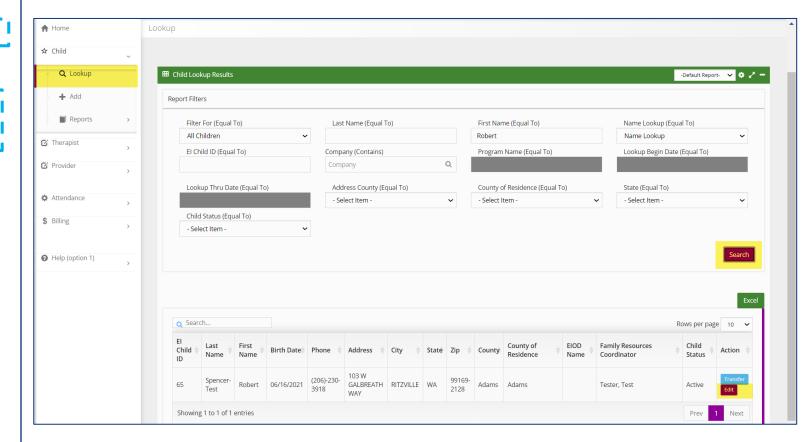
How To

Enter New Insurance Information

Note

• New! Previously, Funding Sources for a child were added per service. In ACORN, Funding Sources are identified within the Funding Sources tab located within the child's record.

- 1. Select the Child Lookup icon.
- Enter search criteria (Report Filters) and select the Search button.
- 3. Locate the Child and select the **Edit** button.





New Policy



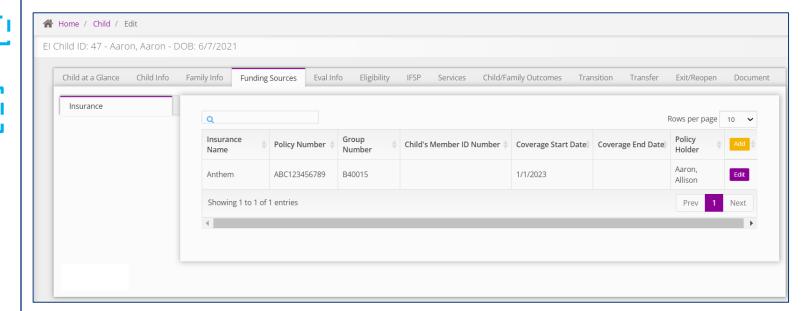
Enter New Insurance Information

Note



 Multiple funding sources can be entered and will display in a table format

- 1. Select the **Funding Sources** panel.
- 2. Existing insurance will be shown in the grid.
- 3. Search for existing insurance prior to entry via the grid.
- 4. If insurance is not listed and requires entry select, the **Add** button. To view, existing insurance select the **Edit** button.





New Policy

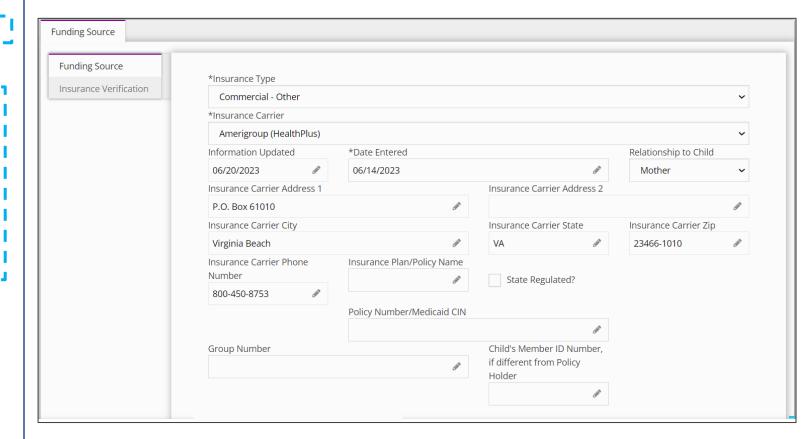


Enter New Insurance Information

Note

- Asterisks(*) indicate required fields.
- WA ESIT Funding Source available for selection in ACORN include:
 - Part C of IDEA
 - State 0-3 SpEd
 - State ELTA
 - Medicaid
 - Private Insurance
 - Tri-Care
 - DDA

- 1. Select the appropriate **Insurance Type** and **Insurance Carrier** from the dropdown menus.
- 2. The Insurance Carrier's information populates in subsequent fields, if carrier's information is available in ACORN.





New Policy



Enter New Insurance Information

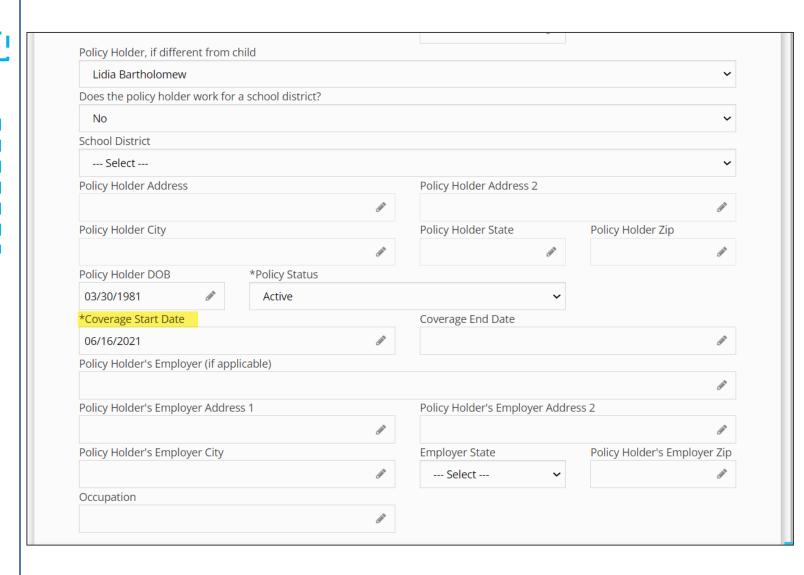
Note

- Policyholder must be entered as a member of the child's family on the **Family Info** tab/**Family Base** and the "**Insures Child**" checkbox must also be checked for the name to be listed in the dropdown.
 - Policyholder selection will prepopulate policyholder address
 - An 'Active' policy refers to a policy currently in effect.
 An 'Inactive' policy refers to a policy no longer in effect.

Step / Action

- 1. Continue to enter applicable fields.
- 2. Enter Coverage Start Date

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New Policy



Enter New Insurance Information

Note

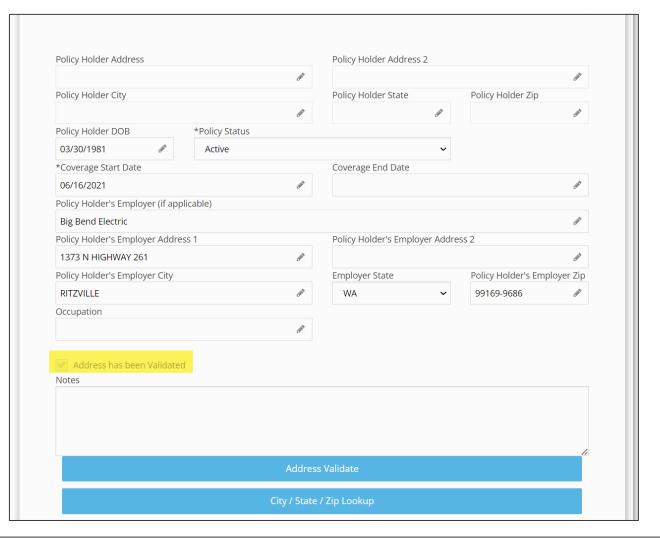


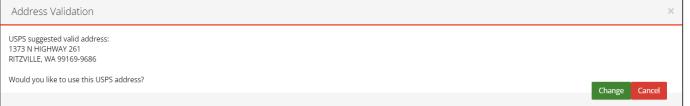
• If the change button is selected, address validation automatically replaces previously entered Employer Address

Step / Action

- 1. Enter Policy Holder Employer Address information.
- 2. Select the **Address Validate** button to validate the address via USPS.
- 3. Select **Change** to update and validate the address.
- 4. Address validation checkmark will automatically appear once the address is validated.

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New Policy

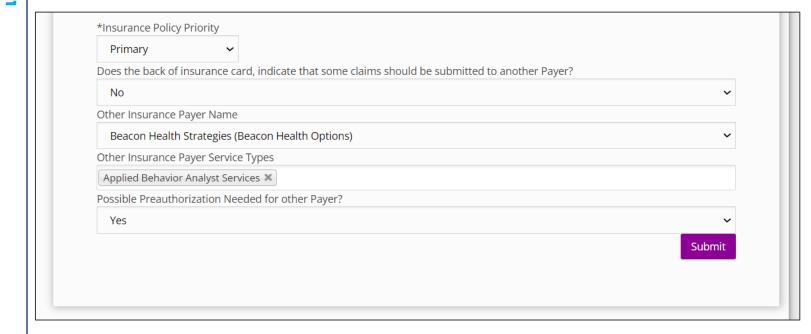


Enter New Insurance information

Step / Action

- 1. Select the **Insurance Policy Priority** (i.e., primary, secondary, tertiary).
- 2. Enter additional fields, if applicable.
- 3. Select the Submit button.
- 4. If required information is missing, an **Error Saving** message will indicate which field needs to be corrected

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Error saving
Policy Status is required.
This Policy Number is a duplicate of a previously entered Policy Number.

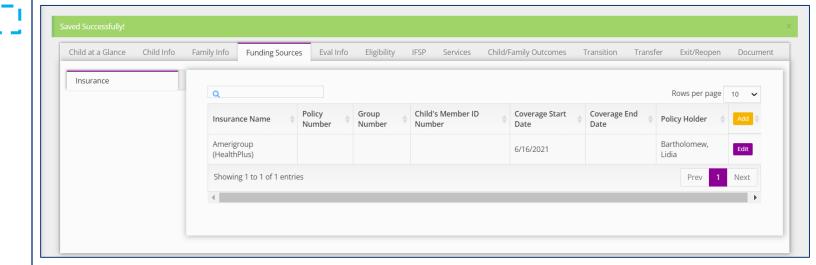


New Policy



Enter New Insurance Information

- 1. A 'Saved Successfully' message indicates a completed insurance entry
- 2. Newly entered insurance policies populate within the insurance grid.





New Policy

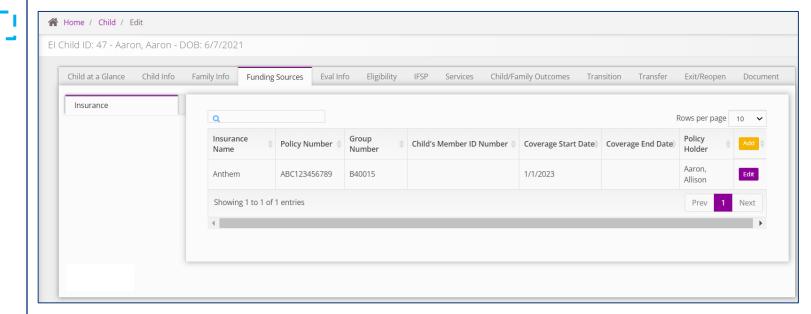


Verifying Insurance Information

Step / Action

- 1. Select the **Funding Sources** panel.
- 2. Existing insurance will be shown in the grid.
- 3. Search for existing insurance prior to entry via the grid.
- 4. If insurance is not listed and requires entry select, the **Add** button. To view, existing insurance select the **Edit** button.

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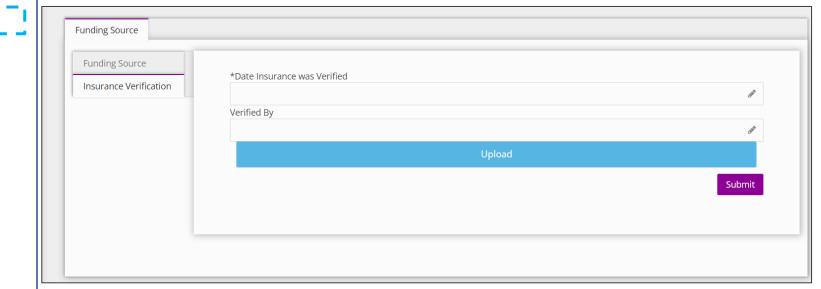


Verification



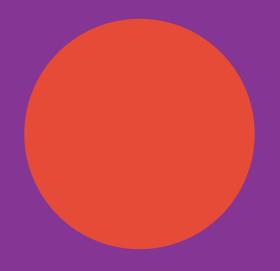
Verify Insurance Information

- 1. Select the **Insurance Verification** panel.
- 2. Enter **Date Insurance was Verified** and **Verified By.** Select **Submit**. If the child has coverage under multiple insurance plans, the verification must be done for each of the different policies.





Thank you!





Revision History

Version Number	Release Date	Author	Revision Summary
v.1	6.7.2023	Courtney Pittman	
V.2	9.15.2023	Courtney Pittman	

