



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.



Insurance

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.

Step / Action

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

Home

Child

Lookup

Child Lookup Results

Report Filters

Filter For (Equal To): All Children

Last Name (Equal To):

First Name (Equal To): Robert

Name Lookup (Equal To): Name Lookup

EI Child ID (Equal To):

Company (Contains): Company

Program Name (Equal To):

Lookup Begin Date (Equal To):

Lookup Thru Date (Equal To):

Address County (Equal To): - Select Item -

County of Residence (Equal To): - Select Item -

State (Equal To): - Select Item -

Child Status (Equal To): - Select Item -

Search

Excel

EI Child ID	Last Name	First Name	Birth Date	Phone	Address	City	State	Zip	County	County of Residence	EIOD Name	Family Resources Coordinator	Child Status	Action
65	Spencer-Test	Robert	06/16/2021	(206)-230-3918	103 W GALBREATH WAY	RITZVILLE	WA	99169-2128	Adams	Adams		Tester, Test	Active	Transfer Edit

Showing 1 to 1 of 1 entries

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Insurance

New Policy

How To

Enter New Insurance Information

Note

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

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.

Home / Child / Edit

EI Child ID: 47 - Aaron, Aaron - DOB: 6/7/2021

Child at a Glance Child Info Family Info **Funding Sources** Eval Info Eligibility IFSP Services Child/Family Outcomes Transition Transfer Exit/Reopen Document

Insurance

Search

Rows per page 10

Insurance Name	Policy Number	Group Number	Child's Member ID Number	Coverage Start Date	Coverage End Date	Policy Holder	
Anthem	ABC123456789	B40015		1/1/2023		Aaron, Allison	Add Edit

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Insurance

New Policy

How To

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

Step / Action

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.

Funding Source

Funding Source

Insurance Verification

*Insurance Type
Commercial - Other

*Insurance Carrier
Amerigroup (HealthPlus)

Information Updated
06/20/2023

*Date Entered
06/14/2023

Relationship to Child
Mother

Insurance Carrier Address 1
P.O. Box 61010

Insurance Carrier Address 2

Insurance Carrier City
Virginia Beach

Insurance Carrier State
VA

Insurance Carrier Zip
23466-1010

Insurance Carrier Phone Number
800-450-8753

Insurance Plan/Policy Name

Policy Number/Medicaid CIN

Group Number

State Regulated?

Child's Member ID Number, if different from Policy Holder



Insurance

New Policy

How To

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**

Continued on next page...

Policy Holder, if different from child		
Lidia Bartholomew		
Does the policy holder work for a school district?		
No		
School District		
--- Select ---		
Policy Holder Address	Policy Holder Address 2	
Policy Holder City	Policy Holder State	Policy Holder Zip
Policy Holder DOB	*Policy Status	
03/30/1981	Active	
*Coverage Start Date	Coverage End Date	
06/16/2021		
Policy Holder's Employer (if applicable)		
Policy Holder's Employer Address 1	Policy Holder's Employer Address 2	
Policy Holder's Employer City	Employer State	Policy Holder's Employer Zip
	--- Select ---	
Occupation		



Insurance

New Policy

How To

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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Policy Holder Address	Policy Holder Address 2	
<input type="text"/>	<input type="text"/>	
Policy Holder City	Policy Holder State	Policy Holder Zip
<input type="text"/>	<input type="text"/>	<input type="text"/>
Policy Holder DOB	*Policy Status	
<input type="text" value="03/30/1981"/>	<input type="text" value="Active"/>	
*Coverage Start Date	Coverage End Date	
<input type="text" value="06/16/2021"/>	<input type="text"/>	
Policy Holder's Employer (if applicable)		
<input type="text" value="Big Bend Electric"/>		
Policy Holder's Employer Address 1	Policy Holder's Employer Address 2	
<input type="text" value="1373 N HIGHWAY 261"/>	<input type="text"/>	
Policy Holder's Employer City	Employer State	Policy Holder's Employer Zip
<input type="text" value="RITZVILLE"/>	<input type="text" value="WA"/>	<input type="text" value="99169-9686"/>
Occupation	<input type="text"/>	

Address has been Validated

Notes

Address Validation

USPS suggested valid address:
1373 N HIGHWAY 261
RITZVILLE, WA 99169-9686

Would you like to use this USPS address?



Insurance

New Policy

How To

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

Continued on next page...

*Insurance Policy Priority

Primary ▾

Does the back of insurance card, indicate that some claims should be submitted to another Payer?

No ▾

Other Insurance Payer Name

Beacon Health Strategies (Beacon Health Options) ▾

Other Insurance Payer Service Types

Applied Behavior Analyst Services ✕

Possible Preauthorization Needed for other Payer?

Yes ▾

Submit

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



Insurance

New Policy

How To

Enter New Insurance Information

Step / Action

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

Saved Successfully!

Child at a Glance Child Info Family Info **Funding Sources** Eval Info Eligibility IFSP Services Child/Family Outcomes Transition Transfer Exit/Reopen Document

Insurance

Search

Rows per page 10

Insurance Name	Policy Number	Group Number	Child's Member ID Number	Coverage Start Date	Coverage End Date	Policy Holder	Add
Amerigroup (HealthPlus)				6/16/2021		Bartholomew, Lidia	Edit

Showing 1 to 1 of 1 entries

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Insurance

New Policy

How To

Verifying Insurance Information

Step / Action

1. Select the **Funding Sources** panel.
2. Existing insurance will be shown in the grid.
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Continued on next page...

Home / Child / Edit

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Showing 1 to 1 of 1 entries

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Insurance Verification

How To

Verify Insurance Information

Step / Action

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.

The screenshot shows a web application interface for insurance verification. On the left, there is a vertical sidebar with two tabs: 'Funding Source' (top) and 'Insurance Verification' (bottom, highlighted with a purple border). The main content area is a form with the following elements:

- A label '*Date Insurance was Verified' above a text input field with a small edit icon on the right.
- A label 'Verified By' above another text input field with a small edit icon on the right.
- A large blue button labeled 'Upload' positioned below the input fields.
- A purple button labeled 'Submit' located in the bottom right corner of the form area.



Thank you!



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Revision History

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

