Capitation/Bonus/Incentive Posting

1. Build a 'Capitation Account'
    - Add dummy patient
        i.   Make the name easily recognizable ie: Bonus, B or Incentive, Misc
        ii. Any address, such as the office address
        iii. Statement: **HLD**
2. Create a custom transaction code
    - Admin > Transaction Codes
    - In our example we created **CAP Debit Transaction Code: CAPDBT**

i.   Type-Debit, Group -IC-, Responsibility – All Insurance

3. Go to the Patient Dashboard of the Capitation/Incentive/Bonus 'patient' Account
    - Click **Post Charge** > Create $0 charge manually
        I.   Use misc for dx
        II. Use misc for CPT of a zero amount
        III. SAVE > proceed to encounter
        IV. Make note of the encounter number
      OR
    - Use Charge Template "Capitation" for charge (see pg 3)
        I.   SAVE > proceed to encounter
        II. Make note of the encounter number

4. Click **Post Payment**
    i. Enter Insurance Receipt, as usual
    ii. Choose radio button, **Do Not Post**
    o If you forget to click Do Not Post, click Cancel to get back to the receipt
    iii. Save
    iv. Select **Post Expert Mode**
        1. Enter Encounter number and **Tab**
        2. Choose **Line number**
        3. In the popup > Choose IP as the transaction code and the amount > Tab
        4. Next choose the transaction code: CAPDBT (or whatever you named your CAP Debit Transaction Code) >then the amount> Tab
            ● This transaction is to write off the credit balance to zeros out encounter
        5. Click **Save as Unbalanced**
        6. Click **Save** (See below)

Receipt	From		Received Amount	Applied		In Escrow	New In Escrow
77426			50.00			50.00	0

Encounter ID	Line	Date From	Date To	Procedure	Billed	
45134	1	04/29/2016	04/29/2016	MISC	0.00	

Balance	Allowed	Billed-Allowed	Paid	Remittance Remark Codes	Status
0.00	50	$-50.00	$50.00		Paid ▾

Transaction Code	Transaction Note	Amount
	🔍	0.00 -50

Payments/Adjustments (Click Code to Delete)   Balance 0

Code	Description	Ins/Ord	Group	Amount
ALWD	INSURANCE ALLOWED	1	IN	50.00
IP	INSURANCE PAYMENT	1	IP	50.00
CAPDBT	INCENTIVE PAYMENTS	1	IC	50.00

Balance To
Patient ▾
Claim Crossed ☐
[Patient]

Send to Worklist   Worklist Note
[Do not send ▾]

[Save [F2]] [Cancel]
[Save Unbalanced] [Auto Calculate]

- **Charge Template**
  - Libraries > Charge Template
    - Enter Template Name, such as Incentive
    - Enter Dx code: Misc
    - Enter CPT: Misc
    - $0 charge
    - Tab until it appears in the window below
    - Save

Add/Edit Charge Templates

Ord	Template Name					
	INCENTIVE					

Dx 1		Dx 2	Dx 3	Dx 4	Dx 5	Dx 6
MISC		MISCELLANEOUS				

Dx 7	Dx 8	Dx 9	Dx 10	Dx 11	Dx 12

•CPT/ID	ProcID	•M1/M2/M3/M4				Diag	Fee	Unit	Total
MISC	MISC					1	0.00	1	0
Billable: - SELECT ▾	Line Note:								

Procedure Lines

									0.00	
#	B	CPT/ID	Submit	M1	M2	M3	M4	Diag	Fee	Unit	Tot
1		MISC2	MISC					1	0.00	1.00	0.00