CATEGORY: PAYMENT POSTING ~ TASK: ERA

Getting Started

We recommend users have a solid understanding of Manual Post Insurance, Escrow and Reference Batch. Please see the Help Center in the bottom left hand of the database > PDF.

Easily post Electronic Remits. Click '**Payments**' in the sidebar or the '**GO'-cut** 'ERA'


How to Post an ERA - Overview

1. From the ERA List > Use Filter Criteria to locate the ERA to Post
2. Click the **ERA number**
3. Click '**View Remit Items**'
4. Click **[Apply]**
5. Work Remits in the status **'On Hold'** or **'DW**' - post all escrow
6. Click the **ERA number** to return to the ERA Dashboard to double check all money has been posted

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How to add an Insurance ID and/or Payer ID to an ERA

This step is only necessary if you see the message: SORRY CANNOT POST ERA... INSURANCE ID NUMBER IS MISSING FROM REMIT FILE or if a Remit goes on hold for a similar reason
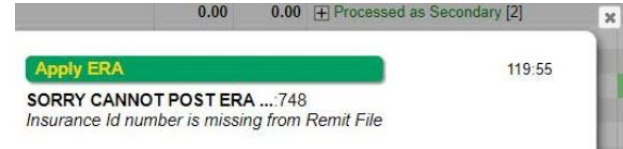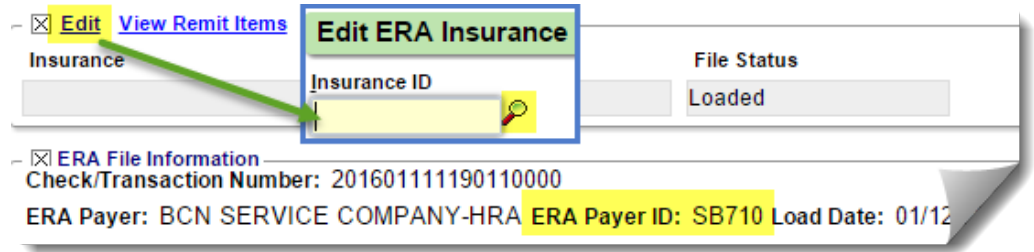
There may be some mapping necessary when you first receive an ERA from an Insurance Company.

In this examples note the missing Insurance and Payer ID on the ERA List page

Map the ERA payer ID to an Insurance on the ERA File Dashboard

● Take note of the ERA Payer ID

● Click the ERA number
● Click 'Edit' on the ERA File Dashboard
● Lookup and ADD the most likely Insurance > Save

Add the ERA Payer ID to the Insurance Library

Ideally this action was taken when the Insurance library was setup. This action provides the program a way to recognize these ERA files on a go forward. * for more about Insurance Library Setup see Help Center > Getting Started > Add an Insurance

To find the Insurance ID affiliated with any encounters that go on hold or if the entire ERA will not post any encounter. Look to the policy ara

● Copy the Payer ID listed on the ERA File Dashboard
● Go to the Insurance Library > Choose the Insurance to update
● Click to Edit
● ADD the ERA Payer ID > Save
● In some instances ERA's for the same insurance are received from multiple payer IDs. To add several payer IDs use a comma to separate them without a space

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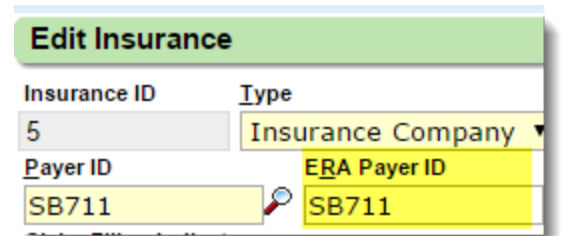
CATEGORY: PAYMENT POSTING ~ TASK: ERA

ERA List page

A. **Filter Criteria** allows the user to filter the page for specific ERA
   ○ 'Loaded' ERA show by default > To view previously processed ERA use the Status Dropdown
B. Status Key - Each column displays the number of remits in this status
C. **ERA Number** is a hyperlink
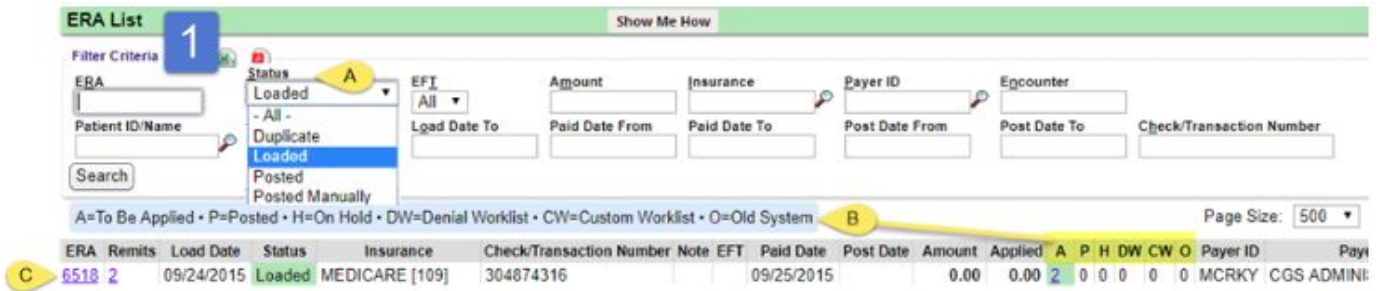

How to Post an ERA

1. Use 'Filter Criteria' to locate the ERA
2. On the 'ERA List' page > Click **ERA number**
3. 'ERA File Dashboard' > Click '**View Remit Items**'
4. Click **[Apply]**
➜ 'Apply ERA' popup displays a % countdown
➜ Generates receipts and auto-post payment or holds remits for manual review, based on system delivered rules
➜ After 'Apply', the remit numbers become hyperlinks
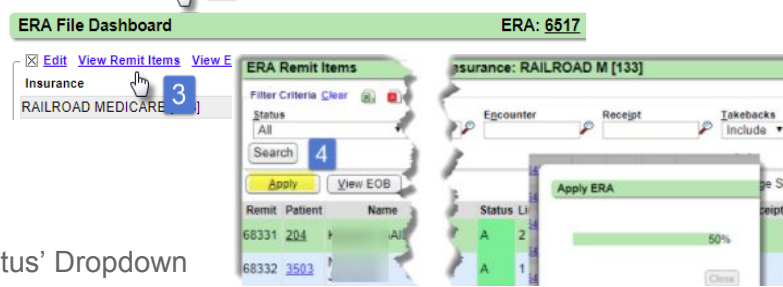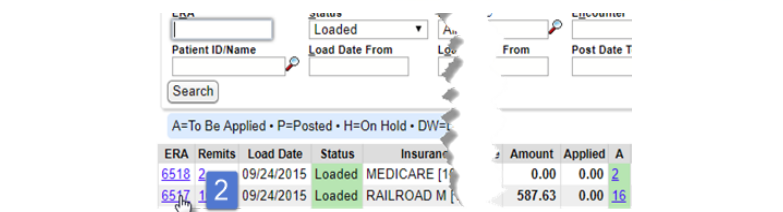
5. Work Remits in the status '**Hold'** or **'DW'** - Use the 'Status' Dropdown to filter for the 'On Hold' and 'Denial Worklist' Remits * *see below > How do I post DW, Denial Worklist or On Hold remits?*
   A. Use checkbox 'Unapplied Only' to be sure *NO money is left in Escrow*
6. Click the **ERA number** on the 'ERA Remit Items Page' to return to the 'ERA File Dashboard' to double check all money has been posted.
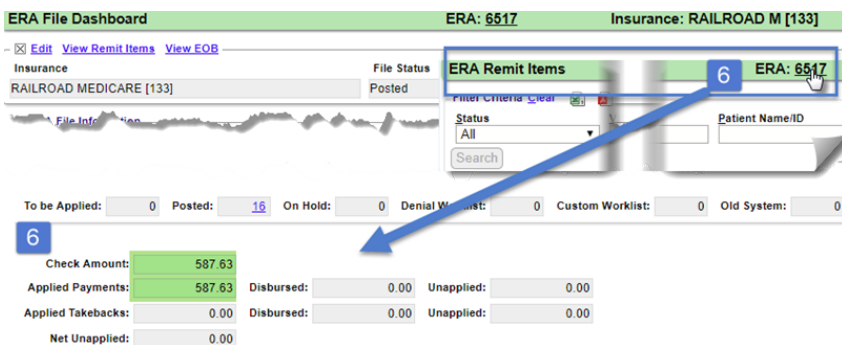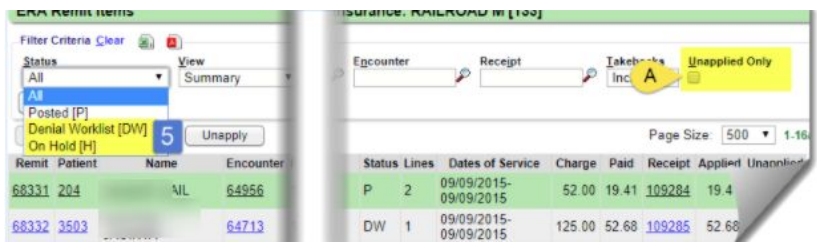
In our screenshot the '*Check Amount'* and the '*Applied Payments'* are equal and there is no '*Unapplied*' amount, therefore we have posted this ERA in full.

How do I post DW, Denial Worklist or On Hold remits?

We intentionally put remits in status DW or On Hold for manual review. The user may decide to post as it has been remitted, in full, or per line or choose to decide after posting the money in escrow, to appeal the adjudication with the insurance.

ERA Remit Items page > Use the Status filter for DW or Hold > Click Remit number to access the 'Manage Electronic Remittance Items'

1. 'Claim Action' drop-down determines how remit posts; if a 'Claim Action' is selected, 'Remit Status' (6) updates to 'Posted' > Do not Post/ Transfer Balance, Post as Note/Leave Balance, Post as Note Transfer Balance or Procedure Specific * see 'What does Post as Note do?'
2. [Manual Post] - opens popup to manually post
3. Procedure Specific - choose an action per line
4. [Post Expert]
5. Drop-down to map to corrected Charge Line number
6. 'Change Remit Status/Worklist':
   - 'Posted' - 'Claim Action' chosen or no action taken and user wishes to mark the remit as 'Posted' (completed)
   - 'On Hold' - Remit put in 'Hold' status (still needs to be managed)
   - 'Custom Worklist' - Remit to be added to 'Custom' (user defined) worklist
   - 'Denial Worklist' - Remit added to 'Denial' (system) worklist
   - 'Old System' - Charge generated from Old Practice Management
7. [Save]
   A. Hyperlinks to 'Patient'
   B. 'Encounter'
   C. 'Reference Batch'
   D. 'Receipt'
   E. Remit Status - if DW or On Hold see Note below for details
   F. Link to 'Insurance Management'
   G. After Posting - visual on how the 'Claim Action' will affect this remit
   H. Note - Contains system delivered reason item is on Hold or in DW, can be added to by the user

IF some of the ERA is adjudicated for a Legacy system and are in our PM > You choose to post the ERA by clicking [Apply] as usual.

○ We 'Disburse' any remits that do not have OUR account format of patient ID, the letter 'E' and the encounter ID, ie 27e14. The system produces a Receipt that has the letter 'O' in the Disbursed field, O=Old System. This Receipt is a holding card to indicate this money should be posted into the Old PM and is not reported as part of the A/R. This field is editable.

What does 'Post as Note' do?

Post as Note / Leave or Transfer Balance- The transactions will simply be posted as notes in the ledger and will have *no financial impact*. 'Leave' - Balance stays with the current payer for possible appeal etc
*The transaction is just a NOTE so no Balance change is made

➔ Here is an example of what this action looks in the expanded line item details

| Posted Date	Receipt	Transaction	Insurance	Role	Transaction	Description	Amount	User	Batch/Period	Balance
07/13/2016	29898		1548.00		0.00	0.00 0.00 0.00	0.00		1,548.00	0.00
08/17/2016	31306	35748	UNITED HEA [339] 1		NOTE-IP	NOTE - INSURANCE PAYMENT	0.00	ERA/SUPPORT	2210	1,548.00
08/17/2016	31306	35748	UNITED HEA [339] 1		NOTE-ALWD	NOTE - INSURANCE ALLOWED	0.00	ERA/SUPPORT	2210	1,548.00
08/17/2016	31306	35748	UNITED HEA [339] 1		NOTE-CO197	NOTE - CONTRACTUAL OBLIGATION	379.57	ERA/SUPPORT	2210	1,548.00
08/17/2016	31306	35748	UNITED HEA [339] 1		NOTE-CO45	NOTE - INSURANCE PAYMENT ADJUSTMENT	1,168.43	ERA/SUPPORT	2210	1,548.00

'Transfer'- Balance drops to the next responsible party (this option is rarely used)

Print an EOB to post into the Legacy PM

On the 'ERA Remit Item' > After you have clicked [Apply]
1. Use 'Filter Criteria' to filter for status 'Old System'
2. [View EOB]

The EOB has a 'total paid' amount filtered by the amount to post into the Legacy PM

ERA Remit Items

Filter Criteria Clear

Status | View
Old System [O] ▼ ① ummar

Search

Appl ② View EOB
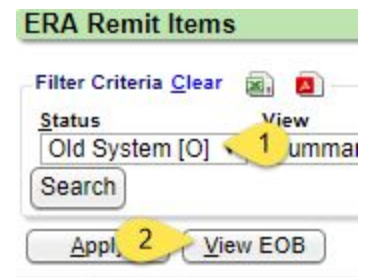
MOWTAS SOLUTIONS, INC.
PO BOX 3399
MECHANICSBURG, PA 170551644

NPI #:
Date: 11/15/2018

TOTAL CLAIMS	21
BILLED AMOUNT	6,566.22
TOTAL REASON CODE ADJUSTMENT AMOUNT	6,256.18
TOTAL ALLOWED AMOUNT	2,245.38
TOTAL DEDUCTIBLE AMOUNT	0.00
TOTAL COINSURANCE AMOUNT	448.52
TOTAL PAID TO PROVIDER	1,766.52
TOTAL INTEREST AMOUNT	0.00
TOTAL CHECK/EFT AMOUNT	4,008.61

ERA File Dashboard

This amount will reflect on the ERA file Dashboard as well

Check Amount:	4,808.61		
Applied Payments:	1,666.27	Disbursed:	1,760.52

How should I use 'Attach New Receipt', 'Attach Existing Receipt'

This feature is especially helpful to manage 'Provider Level Adjustments'. How to use '**Attach New Receipt**' - First identify the dollar amount of the receipt(s). At the ERA File Dashboard look for '**Provider Level Adjustments**' for Take back- Recovery, Penalty or Interest at the 'Provider' level> '**Click Here**' to view the EOB

ERA File Dashboard | ERA: 1880 | Insuranc

☒ Edit View Remit Items View EOB
Insurance | File Status
MEDICARE PART B CLAIMS AK-155 [4]

☒ ERA File Information
This ERA contains Provider Level Adjustments for claims that are not able to be auto-applied. CLICK HERE to view EOB.
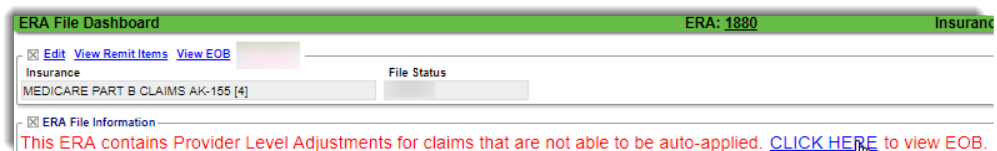
The Provider Level Adjustment Details are near the bottom of the EOB

TAKE BACK > Look for **WO - Overpayment recovery** or **FB -Forwarding Balance** - this may indicate the payer is doing a take back or recovery of money. They should have sent additional information regarding the details in a separate letter. At times they include the encounter number as seen below in the FCN section

Look at the 'Total Check Amount' to be sure this amount is being recovered *at this time and not a future date*

You are now ready to create a receipt for the correct amount

1. For the Receipt > Click
■ '[Attach New Receipt]' - you are going to enter the Receipt now **OR**
■ '[Attach Existing Receipt]' - you already entered the Receipt, and need to associate it with this ERA
2.   Key in the Receipt and [SAVE]
3.   Click on the Receipt > use [Post] or [Post Expert]

I have manually posted an ERA, can I attach the existing receipt(s) to an existing ERA?

Yes. Go to the ERA File Dashboard > Click '[Attach Existing Receipt]', in the popup, click the receipt hyperlink. This action affiliates the ERA with the existing manually posted receipt, with the ERA number.

How do I add a receipt to be posted in the Old or Legacy PM

 On the ERA File Dashboard
● Click 'Attach New Receipt'
● Key in the amount
● >'Disbursed' field type the letter
● Save the receipt
● Post into your legacy PM

'O'

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What should I do if the ERA is listed as a Duplicate?

At times payers send our clearinghouse duplicate files. These are forward into our system for your review. We add a message like this to invite you to confirm if this is indeed a duplicate.

'Click Here' opens the ERA list filtered by this check.

Post the correct ERA. On the second 'duplicate' ERA > At the top left of the ERA File Dashboard > Click 'Edit

- Change the File Status to 'Duplicate' or 'Archived' in the drop-down > enter a Note that it is a Duplicate > [Save]

This changes the status without having to Apply. Note displays on ERA and ERA File Dashboards

ERA Reporting

The Reference Batch [Report] and Batch Breakdown

Receipts Management Report > filters of interest: Filter by 'Reference Batch', Insurance Payment, ERA, EFT and most importantly 'Consolidate ERA Receipts'

Related Help Docs

Reference Batch, Manual Post Insurance, Receipt Correction, Escrow, Insurance Management, Worklist, Corrected claims and paperwork, Reverse or Modify Charge, and Insurance Refund Takeback and Reversal