

Category: PAYMENT ~ TASK: MANUAL INSURANCE

Manual Insurance Payment Posting

Payment posting can be accessed from a variety of places. Attach to a Reference Batch prior to posting!

Create an Insurance Receipt by any of the following methods

- Go box shortcut > NR
- Payments from the side bar > [Post Payment]
- Patient Dashboard > 'Post Payment'



- Choose 'Insurance Payment' from the dropdown
- Received Date * Post date populates from Reference Batch
- Insurance
- Enter Received amount *money remains in escrow until all payments are posted in full
- 'Method' Dropdown, choose how you received the payment
- 'Manually Post' radio button to proceed to post
- [Save]

Once the Receipt is created, post remittances for all encounters on the EOB. See sample EOB:

REND	PROV	S	NOS	PROC	MODS	BILLED	ALL
NAME DEAL, KIMBER			7580122A	ACNT	3855E66525		

If you see an encounter number, simply type it in the 'Patient ID' field, we type 'e66525' and [Tab] to post

If you are *unable* to find an encounter number on the EOB

- Search for the Patient listed
- Choose patient ID* you may skip step one and key the patient number if you have it
- Choose an Encounter > proceed to posting
- If you have chosen the wrong encounter use the back button to 'Choose a different Encounter'

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Tab through the fields, entering the values from an EOB, [Save] the payment on this receipt. When you have posted the receipt in full, you may use the 'NR' shortcut to enter the next receipt to post.

Post Insurance Payment(s)				Receipt: 109496					
Receipt	Insurance	Note							
109496	MEDICARE [109]								
Received	Check Date	Posted	Reference	Received	Escrow 12				
04/29/2019		04/29/2019	4654654654	325,228.25	325,228.25				
Patient	Name								
E66525 1	(P) DEAL, KIMBER E								
Post As Insurance 2	Post As Responsibility 3	Crossed To Secondary 4							
(PRIMARY) MEDICARE [109]	- Default -	<input type="checkbox"/>							
					<input type="button" value="Payment"/> <input <span="" style="color: red;" type="button" value="Takeback"/> 5				
Patient: 3855 Encounter: 66525 Allowed: 185.92 Paid: 180.00 CO45: 14.08 PR3: 0.00 PR1: 0.00 PR2: 5.00 Other: 0.92 7					<input <span="" style="color: red;" type="button" value="Post Claim Level"/> 6				
DOS	CPT	Charge	Balance 8	Allowed	Paid	CO45	Copay(PR3)	Deductible(PR1)	Coinsurance(PR2)
04/06/19	99214	200.00	0.00	185.92	180.00	14.08			5.00
All Distributed 10		Other Code + 9	Other Amount	Note	Balance To 11			To Worklist 13	
		CO256	0.92		(2) BCBS [107]			N/A	

Insurance Payment Field by Field Details

1. Type encounter number or lookup patient and choose specific encounter
2. Dropdown 'Post as Insurance' - auto populated with Insurance on the Receipt, if the Insurance policy on the encounter is different - use this dropdown to choose it.
3. Post As Responsibility > rare instances when a secondary claim is remitted as a primary
4. 'Crossed to Secondary' - Most often checked for primary Medicare claims when they are crossed to secondary
5. [Takeback] > click to post takeback
6. 'Post Claim Level' * used for Auto Accident and other claim level adjudication
7. Above the DOS we calculate the allowed, paid etc for the claim
8. Allowed= allowed on EOB, Paid – paid amount, CO45= auto-calculated, Copay- PR3 (patient responsibility), Deductible –PR1, Coinsurance-PR2 and resulting balance to this party

When you type the 'Allowed' Amount we auto-calculate CO45 * this may be edited

Allowed	Paid	CO45
55.22	180.00	76.52

9. 'Other Code' Type in any other codes, such as sequestration. Click 'plus' sign to add more than one other code
 - a. Other Amount is used for the \$ amount of the code you just typed in
 - b. Note' section is for interoffice communication, it can display on Patient Ledger report
10. **All Distributed** – displays if the line is correctly posted. **Undistributed** – displays if the lines are not yet posted or posted incorrectly
11. Balance to- Dropdown moves the balance to the next party in Insurance Management or 'Leave Balance' with the current party
12. Escrow amount counts down amount left to post
13. To Worklist- user may send encounter to a custom worklist for review

IP Receipt details

If you are interrupted during payment posting, you may return to the Receipt dashboard to continue posting > click [Post]

How do I 'Post as a Note'?

If you received a denial or other adjudication you do not want to post at this time, you may Post a Note.

Use the receipt to review posting, click 'Payments Only' checkbox and Print for a printout. Click on any title (like 'Date/Time Entered') to sort the information order of appearance.

This feature is also available in ERA payment posting, as a 'Claim Action'

This allows us to annotate that the insurance has adjudicated but we disagree with their findings. In our example the insurance has rejected using a CO indicating a duplicate, however we have not been paid.

From the 'Post Insurance' Page

After keying in the encounter >

Leave the Allowed, Paid, CO45, PR fields blank

1. 'Other Code' = NOTE
2. 'Other Amount' is the full charge * this is only a holding card and does not write off or adjust the claim
3. Add a Note- the description of the reason you are not posting this line as remitted, we suggest you list the CO, OA or PI code
 - o This will go on the patient's statement
4. 'Balance To' - this dropdown allows the user to move the balance if it is necessary, usually if we are potentially resubmitted this claims, 'Leave Balance'
5. You may place this into a Worklist

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'Post as Note' - On the Encounter Dashboard

- To view the note check 'Include Note' >expand the line item
 - Note under RRC

Encounter Dashboard

Balance
 [Receipts](#)
 [ERAs \[0\]](#)
 [Post Payment](#)
 [Post Adjustment](#)
 [Post Refund](#)

Insurance	Patient	Collection	Include Notes [1]:
306.23	0.00	0.00	<input checked="" type="checkbox"/>

Line	DOS	CPT	Charge	ALWD	CO	OA
1	04/06/2019	99214	200.00	0.00	0.00	0.00
2	04/06/2019	76080	106.23	0.00	0.00	0.00

Posted Date	Receipt	Transac'n	Insurance	Role	Transaction	Description
04/29/2019	<input type="checkbox"/> 109496	129274	MEDICARE [109]	1	IP	INSURANCE PAYMENT
04/29/2019	<input type="checkbox"/> 109496	129274	MEDICARE [109]	1	NOTE	NOTE
04/29/2019	<input type="checkbox"/> 109496	129274	MEDICARE [109]	1	RRC	REMITTANCE REASON CODE

Note: CO18

Claim-Level Posting

Encounters, that are paid at the claim level (with no line-level adjudication breakdown) can be posted the same way they are paid.

- Key in the encounter number as usual
- Click [Post Claim Level]
- Key in allowed, paid, co45, and the system will distribute the money automatically across the procedure lines
- [Save]

Post Insurance Payment(s) Receipt: 79161

Receipt	Insurance	Note
79161	GALLAGHER BASSET SERVICES [1125]	bwc payment

Received	Check Date	Posted	Reference	Received	Escrow
09/23/2015	09/23/2015	123456789		650.00	650.00

Patient: E54873 Name: PATIENT ABC

Post As Insurance: (PRIMARY) GALLAGHER [1125] Post as Responsibility: - Default - Crossed To Secondary:

Patient: 10752 Encounter: 54873

DOS	CPT	Charge	Balance
06/05/15	99204	366.00	
Undistributed: 366.00			
06/05/15	94760	52.00	
06/05/15	A6450	2.00	
06/05/15	73562	120.00	

Buttons: Save [F2] Cancel

Post Claim Level

Balance: 860.00

Allowed: 650.00 3

Paid: 650.00

CO45: 210.00

Copay(PR3): 0.00

Deductible(PR1): 0.00

Coinsurance(PR2): 0.00

Undistributed: 0.00 ✓

Buttons: Save [F2] 4 Cancel