

Entering an Insurance Payment from Bulk Payments

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Version 20.13

Path: Billing tab > Bulk Payments


About

Posting Bulk Payments allows you to enter an entire EOB in one place, without having to navigate to each patient's chart. The main section of the Bulk Payments window is the Add Payments and Adjustments window, so the general steps to follow are the same as when posting a payment in the Patient Chart.

Bulk Payments


1. Navigate to the **Add Payments and Adjustments** window using the path above.
2. Search for a **Patient** listed on the EOB  or enter a # in the **Quick Pick Claim #** field. The patient's name is displayed at the top of the window and the patient's insurance details are displayed in the upper right section of the window.
3. Complete the following fields located at the top of the window:
 - **Date:** Defaults to the current date the payment is being posted; change if necessary.
 - **Pay method:** Method the payer used to remit the payment. Select the method from the drop-down menu.
 - **Check/Ref#:** Check number or remit reference number that will be used to balance the payments posted to the remit or EOB.
 - **M:** Memorizes the check number and payment method that is entered.
 - **Ck:** Reuses the last memorized check number and payment method.
 - **(Optional) Memo:** Used to identify a specific remark on an EOB. Memos are displayed on the patient's individual claim in which you are posting payment, but they are not displayed on any correspondence sent to the patient.
 - **Amount:** Populates as amounts are entered into the payment fields. It is not necessary to manually add a dollar amount here.
4. Complete the following fields in the Adjudication Details section of the window starting with the first claim line for the claim number you're posting to. **Completing these two fields calculates the Payment and Adjustment fields**
 - **Allowable Amount:** This is the Allowed amount on the payer's EOB. This field is pre-populated with either the full charge amount or the allowable amount entered into an Insurance Contract for the payer, if applicable. Click into the field and change the amount to match the EOB.



Tip: If a contract has been set up in OP, and the amount in the Allowable field matches the EOB allowed amount, click  to calculate the Payment and Adjustment fields.

- **Patient Responsibility:** This is the amount the patient is responsible for paying. If there is already an amount in this field, it was likely entered during charge posting. If this is the case, confirm the amount matches what is on the EOB, or click in the field to change it to match the EOB.



Tip: If the insurance has determined a total charge amount to be the patient's responsibility, click  to populate the full charge amount into the Patient Responsibility field.

5. Confirm the calculated **Payment** and **Insurance Adjustment** amounts match what is on the EOB.

6. Confirm the **Adjust Reason** (Insurance Adjustment Reason) and **Patient Adjust Reason** fields match the reasons on the EOB.

CPT	Service Type / Date			Units	Charge Details			Charge	Adjudication Details			Disposition			
	Mod	Svc Date			Revd ID	Bill ID			Payment	Adjust	Adjust Reason	Ins Paid	Ins Bal	Insurance Action	
	CPT Description				Ins Policy				Allowable	Pat Resp	Patient Adjust Reason	Pat Paid	Pat Bal	Patient Action	
Claim # : 100022															
99213		12/31/2019		1	353	353	119.00				.00	119.00			
OFFICE/OUTPATIENT VISIT, EST								MED 00000123							
								119.00	.00		.00	0.00			

7. Confirm or select the Patient Action from the drop-down menu to determine how to handle the patient responsibility. If no reason is selected, **Hold on Account** is selected by default and the balance remains until statements are generated. The Patient Action options are:

- **Hold on Account**: Default selection where the balance will be held until statements are generated.
- **Create Statement**: A statement is automatically sent to the Statement Queue.
- **Autopay with PC**: The balance is automatically paid with the patient's credit.

Note: If the practice uses Instamed Merchant Services to process credit card payments, credit cards are saved on file, and the global preference to exclude CC on file from Patient Action list is unchecked (Admin tab > Global Preferences > Billing tab > Administration tab), these options are also available:



- **Autopay with PC + CC**: The balance is paid with a combination of patient credit and the credit card saved on file. This option is only visible if a credit card is saved on file.
- **Autopay with CC**: The balance is paid with the credit card saved on file. This option is only visible if a credit card is saved on file.

8. Once you have all of your adjudication details posted, click the **Save + New** button to post the next payment on the EOB. Or, click the **Save + Close** button if you are done posting your EOB. If you click the **Save + New** button, OP defaults your cursor to the **Quick Pick Claim #** field for the next OP claim number on the EOB.

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Overview

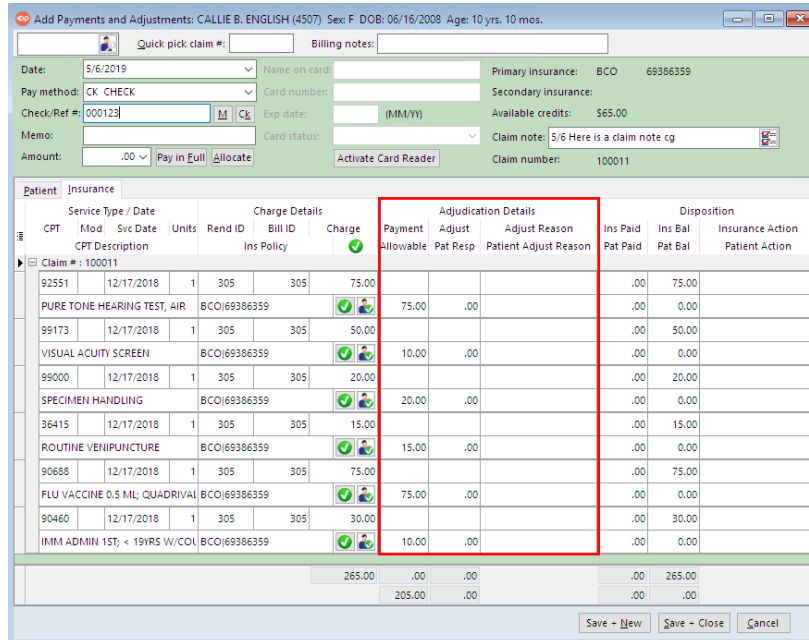
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Bulk Payments

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3. Enter/select the following information:
 - **Date** - Select a date. Defaults to the current date the payment is being posted.
 - **Pay method** - Select the method of payment, such as EFT, Credit Card, etc. from the drop-down menu.
 - **Check/Ref#** - Payment identification or reference number used to balance your payments at the end of the day.
 - **M** - Memorizes the check number that is entered. Posting payments through Bulk Payments retains the check number. It is not necessary to use this button between payments.
 - **Ck** - reuses the last memorized check number.
 - **Memo** (optional) - used to identify a specific remark on an EOB. This Memo field is displayed on the patient's individual claim in which you are posting payment to. It is displayed on an correspondence sent to the patient.
 - **Amount** - Populates as you add Payments into the Payment fields.

- **Claim note** - Can be used to view a claim note on the claim that you are ready to post against or to create a new note for the claim. If you would like to create a follow up task for the claim, click the **Task** button .

4. Enter the EOB information in the **Adjudication Details** section of the window including: the **Payment Amount**, **Allowed Amount**, **Patient Responsibility**, **Insurance Adjustments**, and **Adjustment Reasons**. Note that the claims are grouped together by OP claim number with the charges are displayed below the claim. Use the plus sign or minus sign located to the left of the claim number to expand or compress claims you are not working on.



CPT	Mod	Svc Date	Units	Rend ID	Bill ID	Charge	Adjudication Details			Disposition			
							Payment Allowable	Adjust Pat Resp	Adjust Reason Patient Adjust Reason	Ins Paid Pat Paid	Ins Bal Pat Bal	Insurance Action Patient Action	
Claim #: 100011													
92551		12/17/2018	1	305	305	75.00					.00	75.00	
PURE TONE HEARING TEST, AIR							75.00	.00			.00	0.00	
99173		12/17/2018	1	305	305	50.00					.00	50.00	
VISUAL ACUITY SCREEN							10.00	.00			.00	0.00	
99000		12/17/2018	1	305	305	20.00					.00	20.00	
SPECIMEN HANDLING							20.00	.00			.00	0.00	
36415		12/17/2018	1	305	305	15.00					.00	15.00	
ROUTINE VENIPUNCTURE							15.00	.00			.00	0.00	
90688		12/17/2018	1	305	305	75.00					.00	75.00	
FLU VACCINE 0.5 ML; QUADRIVAL							75.00	.00			.00	0.00	
90460		12/17/2018	1	305	305	30.00					.00	30.00	
IMM ADMIN 1ST; < 19YRS W/COL							10.00	.00			.00	0.00	
						265.00	.00	.00			.00	265.00	
						205.00	.00				.00	.00	

- If a contract has been set up in OP, and the amount in the Allowable field matches the EOB allowed amount, click the **Green** checkmark button to the left of the Allowed Amount field. Once you have clicked the Green checkmark button, the Payment Amount field populates with the appropriate insurance write off.

Claim #: 205714												
CPT	Mod	Svc Date	Units	Rend ID	Bill ID	Charge	Payment Allowable	Adjust Pat Resp	Adjust Reason Patient Adjust Reason	Ins Paid Pat Paid	Ins Bal Pat Bal	Insurance Action Patient Action
99213		01/20/2017	1	305	305	90.00					.00	90.00
OFFICE/OUTPATIENT VISIT, EST							90.00	.00			.00	0.00

- If there is not an amount pre-populated in the Allowable field (or the amount differs from what populates), enter an amount in the **Allowed Amount** field from your payer and press the **Enter** key.
- If the insurance has determined a total charge amount to be the patient's responsibility, click the **Patient Responsibility** button.

Claim #: 205714												
CPT	Mod	Svc Date	Units	Rend ID	Bill ID	Charge	Payment Allowable	Adjust Pat Resp	Adjust Reason Patient Adjust Reason	Ins Paid Pat Paid	Ins Bal Pat Bal	Insurance Action Patient Action
99213		01/20/2017	1	305	305	90.00					.00	90.00
OFFICE/OUTPATIENT VISIT, EST							90.00	.00			.00	0.00
10061	59	01/20/2017	1	305	305	200.00					.00	0.00
DRAINAGE OF SKIN ABSCESS CO							115.00	200.00	1 (Deductible); 1		.00	200.00
												Hold on account

- OP calculates the Adjustment amount based on the amounts in the Allowable and Pat Resp fields.
- Select the an option from the **Patient Adjust Reason** for the patient being assessed a responsibility.
- Select an option from the **Patient Action** drop-down menu to determine how to handle the patient responsibility. he Patient Action options are as follows:
 - **Hold on Account**: This is the default. The balance is held until statements are generated.
 - **Create Statement**: A statement is automatically sent to the Statement Queue.
 - **Autopay with PC**: The balance is automatically paid with the patient credit.
 - **Autopay with PC + CC** (Instamed Merchant Services Only): The balance is paid with a combination of patient

credit and the credit card saved on file. This option is only visible if a credit card is saved on file.

- **Autopay with CC** (Instamed Merchant Services Only): The balance is paid with the credit card saved on file. This option is only visible if a credit card is saved on file.

5. Once you have all of your adjudication details posted, click the **Save + New** button to post the next payment on the EOB. Or, click the **Save + Close** button if you are done posting your EOB. If you click the **Save + New** button, OP defaults your cursor to the **Quick Pick Claim #** field for the next OP claim number on the EOB.
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