

We are currently updating the OP Help Center content for the release of OP 14.19 or "OP 19". OP 19 is a member of the certified OP 14 family of products (official version is 14.19.1), which you may see in your software (such as in Help > About) and in the Help Center tabs labeled 14.19. You may also notice that the version number in content and videos may not match the version of your software, and some procedural content may not match the workflow in your software. We appreciate your patience and understanding as we make these enhancements.

# Process Adjudications on the Unmatched Tab

Last Modified on 07/11/2019 1:08 pm EDT

Version 14.19

**Path: Billing tab > Billing Center button > Adjudications tab > Unmatched tab**

## Overview

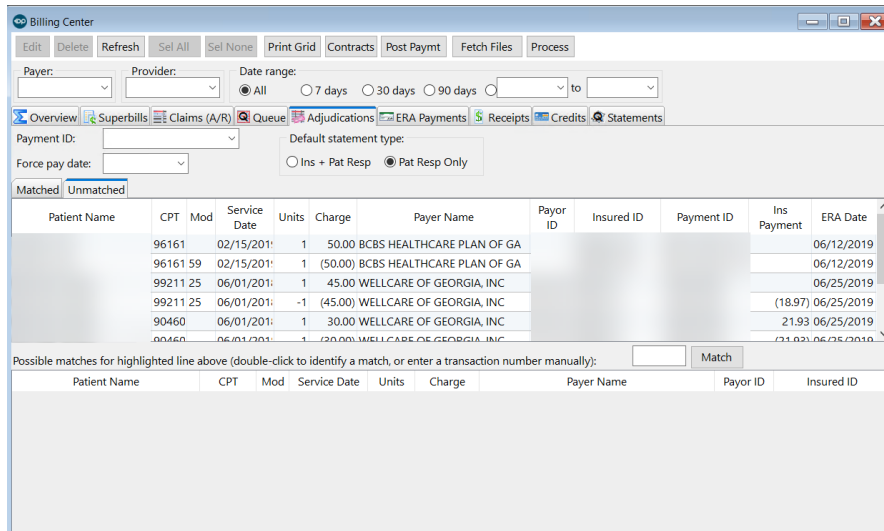
The top half of the window includes adjudications that are unmatched because OP was unable to clearly identify the patient and/or CPT that was received in an ERA. This could happen for several reasons, such as:

- The claim was originally billed in another billing program (other than OP).
- The claim adjudication is listed under the name of the insured as opposed to the patient (e.g. for newborn claims).
- The claim adjudication is for a CPT or claim that no longer exists on the corresponding patient chart (e.g., if a claim was billed, then identified as billed incorrectly in OP and corrected; payment will come in under the original CPT/claim number that no longer exists).
- The claim adjudication is slightly different than the original claim (e.g., the adjudication contains a modifier that does not exist on the corresponding claim in OP).
- The claim adjudication is for a current claim. When OP attempts to match adjudications to claims, it is checking for archived transactions only as the assumption is that if a payment is being received, the corresponding date of service has already been processed on a daysheet.

You must match these adjudications against existing transactions so that they move to the **Matched** tab for review and processing as follows:

1. Navigate to the **Unmatched** tab of the **Adjudications** tab in the **Billing Center** using the path

above.



2. Match the adjudication to an existing claim/transaction using one of the following methods:

- **Method 1:**

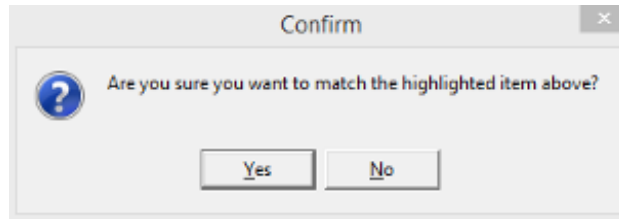
1. On the lower half of the screen, you will find a list of possible matches, as defined by OP (based on the patient name, CPT code billed and date of service).

**Note:** The list of possible matches look at archived claims, so if the reason that adjudication is unmatched is because daysheets have not been processed for these dates of service, it is suggested that you run daysheets to archive these transactions. Once the daysheets have been processed, OP should list the patient in the lower portion of the screen as a possible match.

2. If the matching transaction is located in this portion of the screen, double-click on it. This will auto-populate the **Match Transaction** field with the corresponding transaction number.

- **Method 2:**

1. If the matching transaction is not located in the lower half of the screen, navigate to the **Claims** in the patient chart.
2. Review the patient's claim history.
3. Locate the specific transaction and double-click on it to access the **Claims Details: Linked Charge Transactions** window.
4. Copy the **Transaction #** and close the window.
5. Go back to the **Unmatched** tab in **Adjudications** tab and enter the number in the **Match Transaction** field.
6. Click the **Match**  button.
7. Click **Yes** to confirm that you are matching the adjudication.



- The matched adjudication will now disappear from the **Unmatched** tab, and display under the **Matched** tab for your review and approval, as applicable.

Version 14.10

## Path: Smart Toolbar > Billing button > Adjudications tab

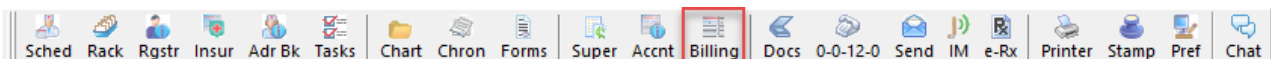
### Overview

The top half of the **Unmatched** screen will include adjudications that are unmatched because OP was unable to clearly identify the patient and/or CPT. This could happen for several reasons, such as:

- The claim was originally billed in another billing program (other than OP).
- The claim adjudication is listed under the name of the insured as opposed to the patient (e.g. for newborn claims).
- The claim adjudication is for a CPT/claim that no longer exists on the corresponding patient account (e.g., if a claim was billed and sent electronically, then identified as billed incorrectly in OP and corrected; payment will come in under the original CPT/claim number that no longer exists if the user previously corrected the problem).
- The claim adjudication is slightly different than the original claim (e.g., the adjudication contains a modifier that does not exist on the corresponding claim in OP).
- The claim adjudication is for a current claim as a result of daysheets not being processed. When OP attempts to match adjudications to claims, it is checking for archived transactions only as the assumption is that if a payment is being received, the corresponding date of service has already been "closed".

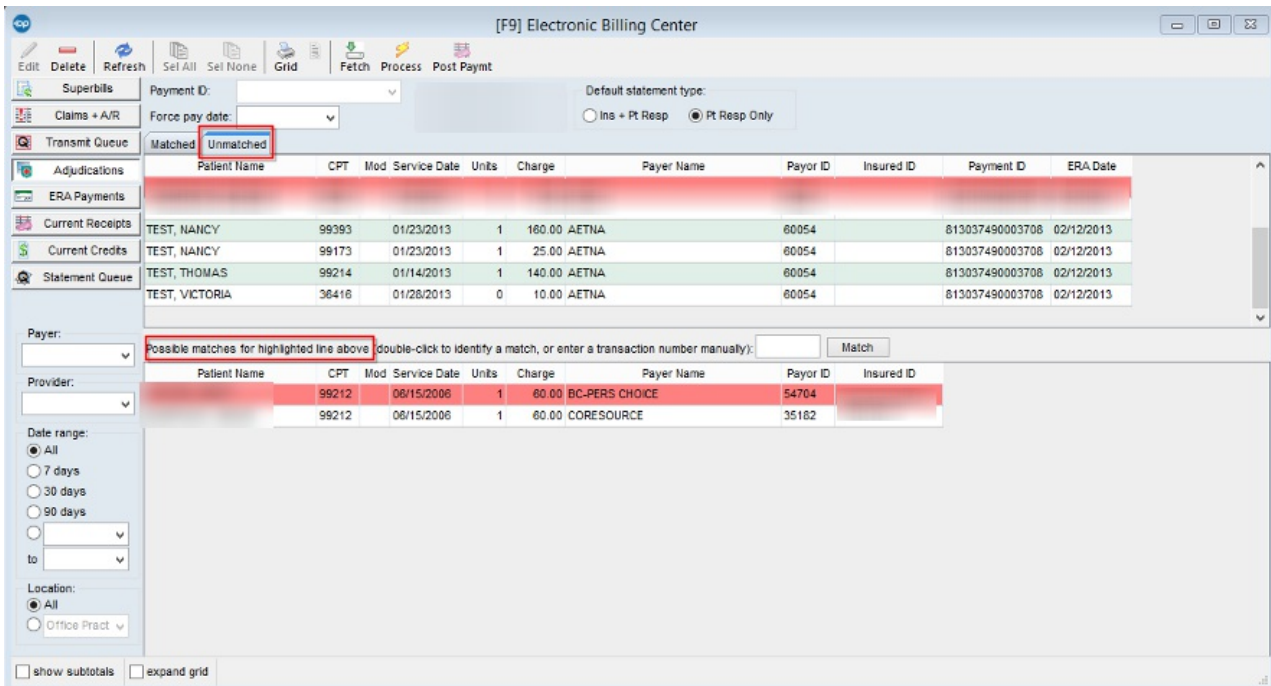
You must match these adjudications against existing transactions so that they move to the **Matched** tab for review and processing as follows:

1. Click on the **Billing** Icon on the Smart Toolbar.



### Smart Toolbar: Billing

2. Click on the **Adjudications** tab 
3. Click on the **Unmatched** Tab.



4. Match the adjudication to an existing claim/transaction.

- **Option 1:**

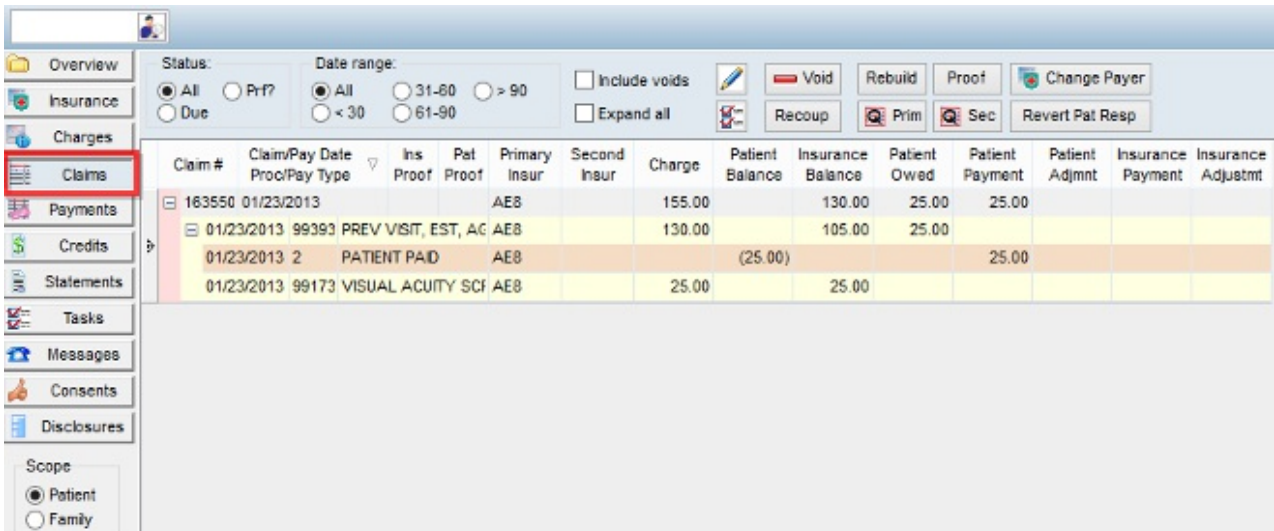
1. On the lower half of the screen, you will find a list of possible matches, as defined by OP (based on the patient name, cpt billed and date of service).

**Note:** The list of possible matches are, again, looking at archived claims so if the reason that adjudication is unmatched is because daysheets have not been run for these dates of service, it is suggested that you run daysheets to archive these transactions. Once the daysheets have been run, OP should list the patient in the lower portion of the screen as a possible match.

2. If the matching transaction is located in this portion of the screen, double-click on it. This will auto-populate the Match Transaction box (in the center of the window) with the corresponding transaction number.

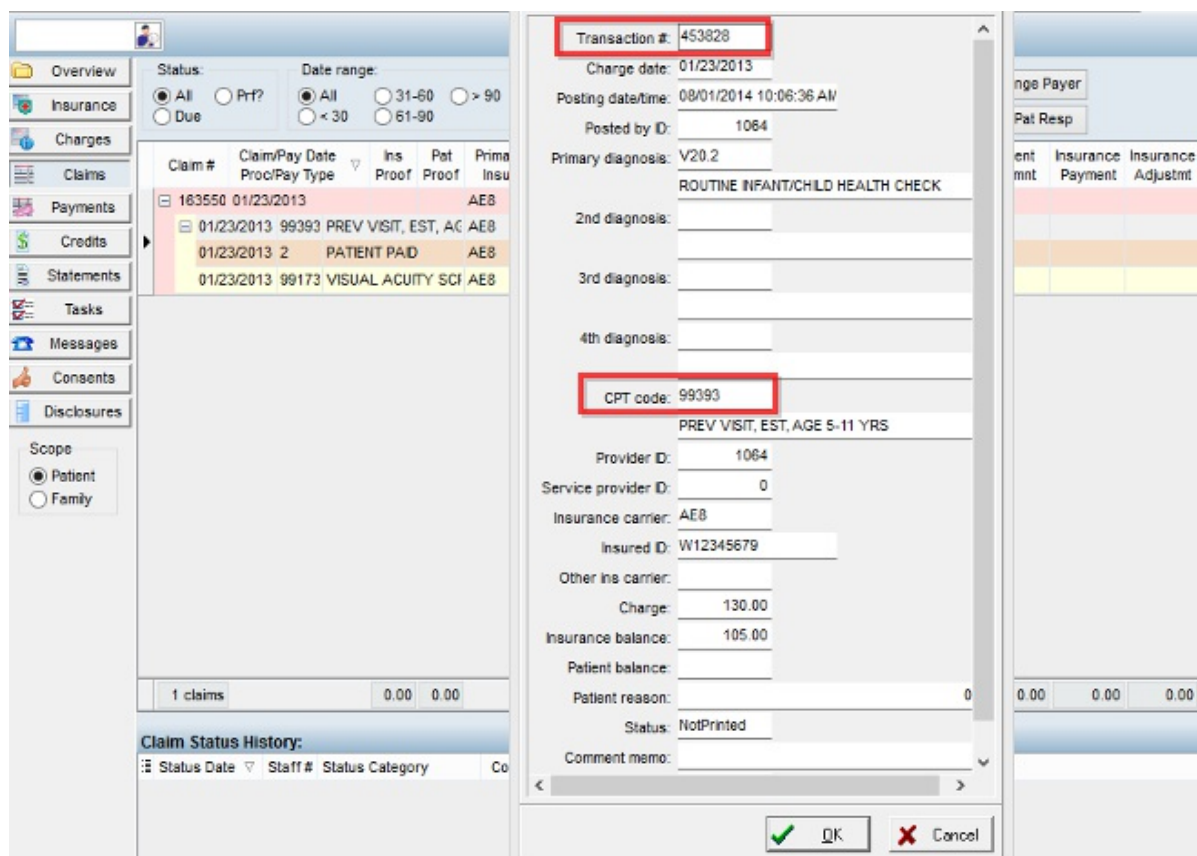
- **Option 2:**

1. If the matching transaction is not located in the lower half of the screen, open the Patient's Account, and then click the **Claims** button to review the Patient's claim history.



Claim #	Claim/Pay Date	Proc/Pay Type	Ins Proof	Pat Proof	Primary Insur	Second Insur	Charge	Patient Balance	Insurance Balance	Patient Owed	Patient Payment	Patient Adjmt	Insurance Payment	Insurance Adjustmt
163550	01/23/2013				AE8		155.00		130.00	25.00	25.00			
	01/23/2013	99393 PREV VISIT, EST, AC			AE8		130.00		105.00	25.00				
	01/23/2013	2 PATIENT PAID			AE8			(25.00)			25.00			
	01/23/2013	99173 VISUAL ACUITY SCF			AE8		25.00		25.00					

2. Locate the specific transaction and double-click on it to access the Claims Details: Linked Charge Transactions window to view the CPT codes Transaction number, copy that Transaction # and close the window.



Transaction #: 453828

Charge date: 01/23/2013

Posting date/time: 08/01/2014 10:06:36 AM

Posted by ID: 1064

Primary diagnosis: V20.2  
ROUTINE INFANT/CHILD HEALTH CHECK

2nd diagnosis:

3rd diagnosis:

4th diagnosis:

CPT code: 99393  
PREV VISIT, EST, AGE 5-11 YRS

Provider ID: 1064

Service provider ID: 0

Insurance carrier: AE8

Insured ID: W12345679

Other ins carrier:

Charge: 130.00

Insurance balance: 105.00

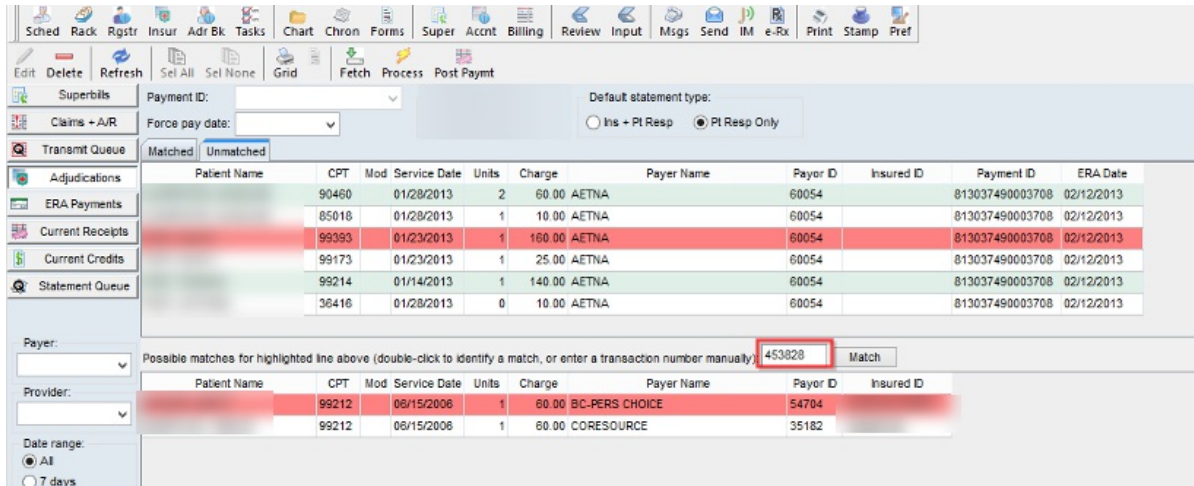
Patient balance:

Patient reason: 0

Status: NotPrinted

Comment memo:

3. Go back to the Adjudications Unmatched tab and locate and record the number in the Transaction # field, then manually enter the transaction number in the match transaction box located in the center of the Unmatched window.

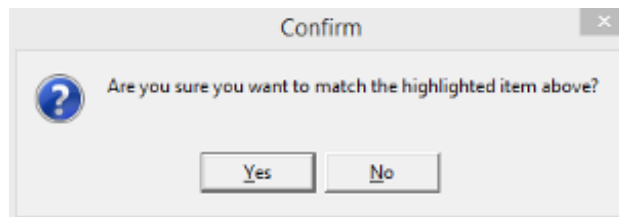


Patient Name	CPT	Mod	Service Date	Units	Charge	Payer Name	Payor ID	Insured ID	Payment ID	ERA Date
90460			01/28/2013	2	60.00	AETNA	60054		813037490003708	02/12/2013
85018			01/28/2013	1	10.00	AETNA	60054		813037490003708	02/12/2013
99393			01/23/2013	1	160.00	AETNA	60054		813037490003708	02/12/2013
99173			01/23/2013	1	25.00	AETNA	60054		813037490003708	02/12/2013
99214			01/14/2013	1	140.00	AETNA	60054		813037490003708	02/12/2013
36416			01/28/2013	0	10.00	AETNA	60054		813037490003708	02/12/2013

Possible matches for highlighted line above (double-click to identify a match, or enter a transaction number manually):

Patient Name	CPT	Mod	Service Date	Units	Charge	Payer Name	Payor ID	Insured ID
99212			06/15/2006	1	60.00	BC-PERS CHOICE	54704	
99212			06/15/2006	1	60.00	CORESOURCE	35182	

- Regardless of how the match transaction box was populated, click the **Match**  button in the center of the window.
- Click **Yes** in response to OPs prompt to confirm that you are requesting an adjudication match.



**i** The matched adjudication will now disappear from the Unmatched tab, and appear under the Matched tab for your review and approval, as applicable.