

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.

Processing a Primary Adjudication for Submission to a Secondary Payer on File

Last Modified on 10/21/2019 4:01 pm EDT

Version 14.19

Path: Billing tab > Billing Center button > Adjudications tab

Overview

When you are posting ERA payments, there may be instances when there is a patient responsibility due. If the patient holds other coverage, the practice will likely send that responsibility to the Secondary Payer on file. To do this, follow the below steps:

1. Navigate to the **Adjudications** in the **Billing Center** using the path above.
2. Select the **Adjudication** line where the patient's secondary insurance is listed.
3. Expand the Adjudication to see the patient's responsibility is displayed.
4. Ensure the following:
 - The patient's responsibility amount is listed in the **Pt. Rsp.** and **Pat Bal.** columns.
 - **Xfr sec:** is displayed in the **Insurance Action** field with the secondary insurance listed.
 - Hold on account is displayed in the **Patient Action** field.
5. Approve all Adjudications for the claim.
6. Click **Post Paymt.** The secondary claim sits in the Transmit Queue waiting for electronic submission or print.

Note: For payers not accepting electronic secondary submission, click the **CMS-1500** button to print a paper claim. Mail it with a copy of the EOB/ERA received from the primary carrier.



Generally, you should be able to obtain a copy of the corresponding EOB (for this ERA) on

your clearinghouse or payer website.

Version 14.10

Path: Smart Toolbar > Billing button > Adjudications tab



Overview

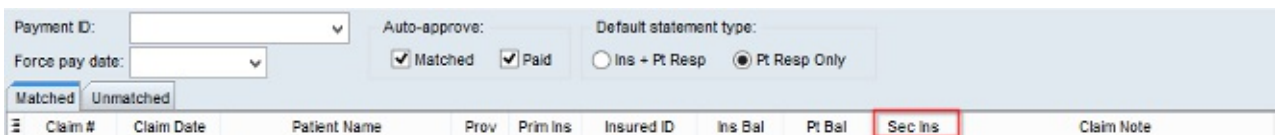
When you are posting ERA's payments back in to Office Practicum, there may be instances where there is a patient responsibility due. You can use the note field to keep track of any information you need to maintain based on the primary adjudication. For example, primary payer assigned patient due co-payment, deductible or co-insurance. However, if the patient holds other coverage the office most likely will want to assess any remaining responsibilities to the Secondary Payer on file and send the claim out electronically to the other payer on file. To do this, follow the below steps:

1. Click the **Billing** button on the Smart Toolbar to open the Billing Center.

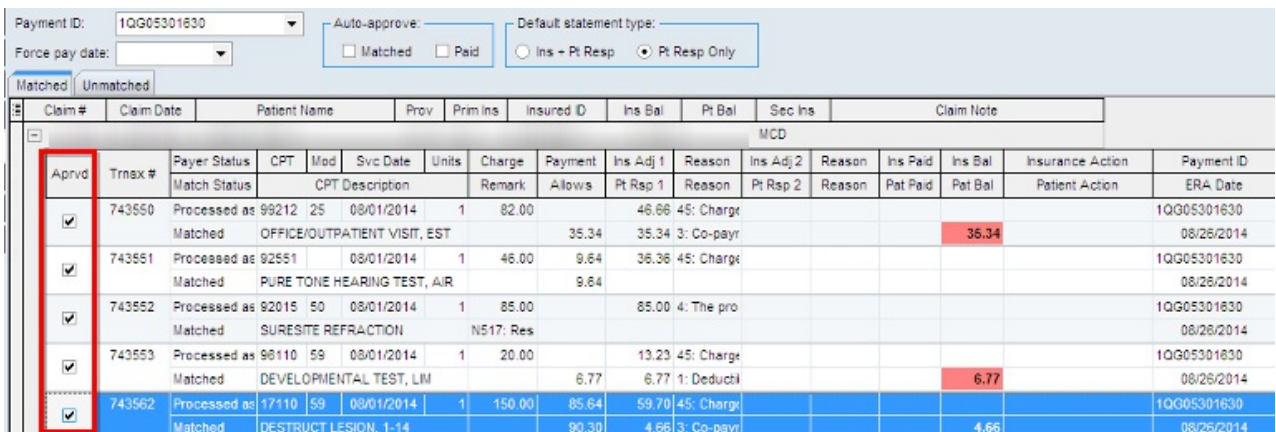


Smart Toolbar: Billing

2. Click the **Adjudications** tab  **Adjudications** .
3. Click the **Expand** button  to open the Adjudication details of the Claim.
4. Notice in the column for Sec Ins, a payer other than the primary payer listed.

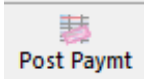




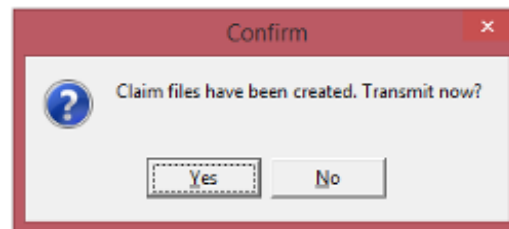
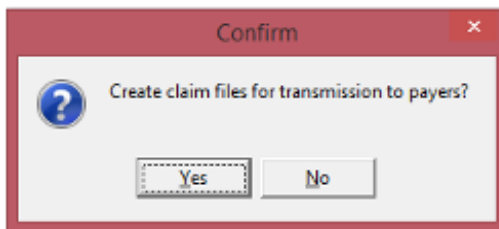
5. Approve all Adjudications for your claim.



Aprvd	Trnsx #	Payer Status	CPT	Mod	Svc Date	Units	Charge	Payment	Ins Adj 1	Reason	Ins Adj 2	Reason	Ins Paid	Ins Bal	Insurance Action	Payment ID
<input checked="" type="checkbox"/>	743550	Processed as	99212	25	08/01/2014	1	82.00		46.66	45: Charge						1QG05301630
		Matched	OFFICE/OUTPATIENT VISIT, EST					35.34	35.34	3: Co-payr				36.34		08/26/2014
<input checked="" type="checkbox"/>	743551	Processed as	92551		08/01/2014	1	46.00	9.64	36.36	45: Charge						1QG05301630
		Matched	PURE TONE HEARING TEST, AIR					9.64								08/26/2014
<input checked="" type="checkbox"/>	743552	Processed as	92015	50	08/01/2014	1	85.00		85.00	4: The pro						1QG05301630
		Matched	SURESITE REFRACTION													08/26/2014
<input checked="" type="checkbox"/>	743553	Processed as	96110	59	08/01/2014	1	20.00		13.23	45: Charge						1QG05301630
		Matched	DEVELOPMENTAL TEST, LIM					6.77	6.77	1: Deductil				6.77		08/26/2014
<input checked="" type="checkbox"/>	743562	Processed as	17110	59	08/01/2014	1	150.00	85.64	59.70	45: Charge						1QG05301630
		Matched	DESTRUCT LESION, 1-14					90.30	4.66	3: Co-payr				4.66		08/26/2014

Adjudications tab

6. Click the **Post Payment** button  .
7. Click the **Transmit Queue** tab  if the payer accepts electronic secondary claims.
8. Click the **Create Files** button  to send the Claims. The Claims include all primary payment details.
9. Click the **Yes** button to Create claim files for transmission to payers and click the **Yes** button to Transmit now.



Note: For payers not accepting electronic secondary submission, click the **CMS-1500** button to print a paper claim. Mail it with a copy of the EOB/ERA received from the primary carrier. Generally, you should be able to obtain a copy of the corresponding EOB (for this ERA) on your clearinghouse or payer website.