

Entering a Capitation Payment

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About

In order to post a capitation payment into OP, you must:

- **Create a Capitation Account.** You only need to do this once in your OP.
- **Create a charge** to post the payment against. You must do this every time you receive a capitation payment.

Create a Capitation Patient Chart

The instructions below show you how to create a single capitation account. However, if your practice receives capitation payment from several payers, you might prefer to create an account for each, naming the chart "Aetna Capitation," for example.

1. In the Clinical, Practice Management, or Billing tab, click the **Patient Chart** button.
2. Ensure you do not already have a Patient Chart created for Capitation by searching for the "patient".
3. Click the **+New Patient** button.
4. Enter in the following information required to create a new Patient Chart:
 - **Patient Last Name:** Payments
 - **Patient First Name:** Capitation



Tip: This is where you will want to decide if you're going to be creating a chart for each capitation payer. If you are, enter the last name as Capitation and the first name as the payer name, so that the "patient's" name is displayed as Aetna Capitation.

- **Date of Birth:** Enter a past date.
 - **Gender:** Unknown (or select any gender).
 - **Address:** Enter the practice's address.
 - **Phone:** Enter the practice's phone number.
 - **Primary Provider:** Select the practice owner or other provider.
5. Click the **Save** button to save.
 6. Click **Insurance** in the Chart Navigation panel.
 7. Create a new insurance record for the "patient" by adding the payer that is making the capitation payment.

Create a Capitation Charge

1. Navigate to the Capitation Patient Chart for which you received a payment.
2. Click **Charges** in the Chart Navigation panel.
3. Click **New Claim**.
4. Enter the following information to create the capitation claim.
 - **Rendering Provider:** Select a provider from your staff list.
 - **Insurance or Self-pay:** Generally there is not an insurance record associated with the Capitation Payment Account
 - **Date:** The system defaults to the current date. If necessary to backdate, click the drop-down menu to change to the desired date.
 - **ICD code:** Any administration DX code is acceptable to use since there is no claim going out to a payer. However, for tracking purposes, you may want to create a new miscellaneous ICD code for the purpose of capitation.
 - **CPT:** Enter the numeric **CPT Code** or click the **Ellipsis** button to search for the code CAP for Capitation. If you do not

have a CAP CPT code, it is recommended to create one for tracking purposes.

- Click the **Unit Charge** field to enter the value of the Capitation Payment.
5. Click the **Save** button.
 6. Once your capitation charge is entered, post the insurance's capitation payment to the charge that you just posted **Note:** This is posted as an insurance payment for reporting and tracking purposes.
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