

How to Enter Payments and Adjustments:

Edit Image Search Options Help Quit
 4435 Payments Entry Form 4/25/97
 Beeswax Kyle 11/30/86 M N
 3183 Collins Dr. 95348 (209) 723-6655 5
 2137 C 229 569999920
 2137 45.00

Claim#	Status	Date	Prov	Insured	Dx 1	PatientOwes	Balance
8133	2	2/06/97	9	2137	7806		45.00

Trans No	T	Date	Check#	Credit# Serv#	Description Comment	Amount
18982	C	2/06/97		99213	EST PT LOW COMPLEXI	45.00

Audit Charge Checks ClaimInfo Patient Sched Aging FindClm# DataTbl Go

Figure 1

Get to the Payment entry form (Figure 1), either by 1) selecting it from under Files on the Main Menu, 2) pressing Atl+Y, 3) clicking the mouse on the Payment button.

The Payment entry form is really three forms in one. On the top is the patient form, in the middle are the claims, and on the bottom are the transactions for current claim.

Please bear in mind, the system is designed to enable the data entry person to maximize the use of the numeric key pad on the keyboard for speed of data entry.

You can start adding payments and adjustments by either: 1) pressing Ctrl+G, 2) Clicking the Go button on the button bar, 3) pressing F10 for the menu or clicking on it then pick O for options and select Go, or 4) by pressing insert when you are on the patient, claim, or transactions area of the form.

For the sake of this discussion, let's press Ctrl+G, that is press the Ctrl key down and hold it down while we tap the G key and then let both keys up.

The "Go To:" Menu

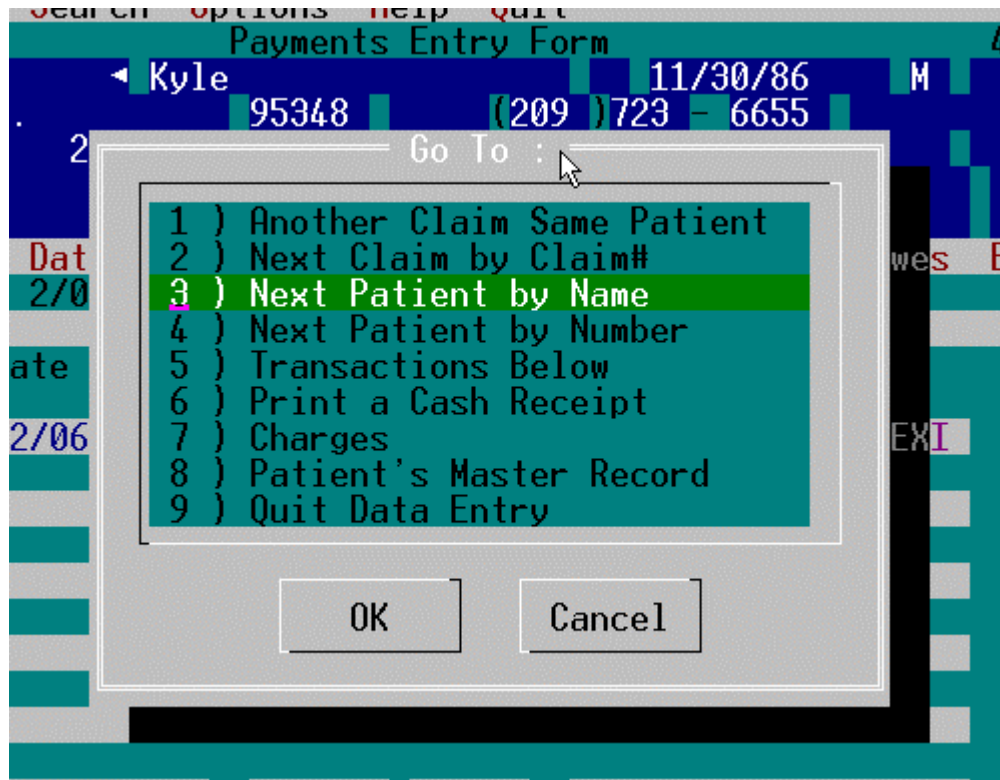


Figure 2 Payments "Go To:" Menu

This brings up the "Go To:" menu as shown in Figure 2. If we select 1 for "Another claim same patient" then it will help us find a claim on the patient shown at the top of the form. If we select 2 for Next Claim by Claim # then we would get a dialog box to enter a claim number. The Next Claim by Claim # is really the way to go when we have the claim number because that will find both the patient and the claim at the same time! The insurance companies are getting pretty good about returning our claim number on their Explanations of Benefits (EOB). This is because we put the Claim # in box 26 of the HCFA1500. If we select 3 for Next Patient by Name then we will get the Dialog Box to find the right patient using their name as discussed at length in the chapter on adding claims and charges. The fourth selection is to find the patient by his patient number.

Posting an Insurance Check

In the first example here we will be posting an insurance company check that has the claim number on the EOB. Imagine if you will that we have a check from Orange Symbol Insurance Company that has two patients on it. The check is for \$140.00 dollars. Because the EOB has the claim number on it we can find the right patient and the right claim in one step.

The first line on the EOB has our account number of 2445 which is claim #2445. So from the Goto Menu in Figure 2 we will pick #2 for next claim by claim #. This brings up the Locate Claim By Claim Number dialog box where we can key in the claim number, see figure 3.

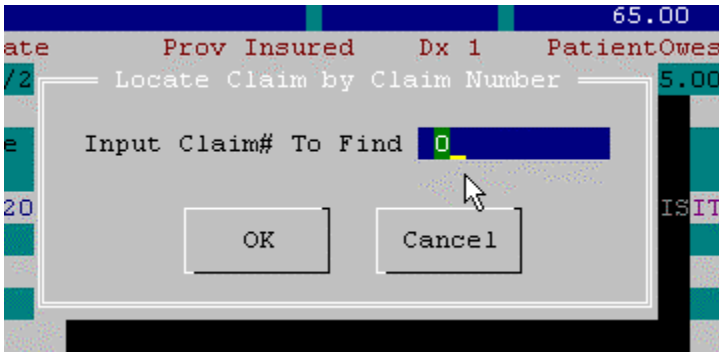


Figure 3

When data in an accept box in the dialog box is green, like the 0 in figure 3, that means whatever we type will overwrite what is there. So we type 2445 and tap enter. The program immediately starts a search for the claim by number. When it finds the claim, and therefore it locates the patient who has that claim and then locates that claim on that patient, it presents a yes / no dialog so that you can confirm that it did find the correct patient and claim, see Figure 4.

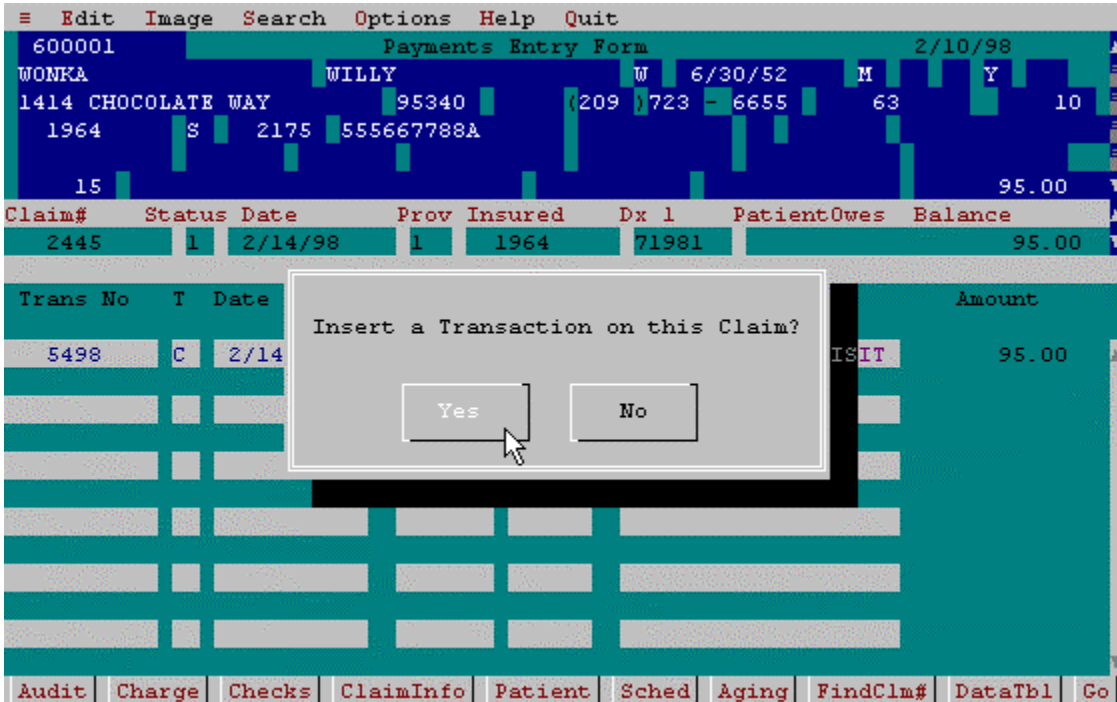


Figure 4

So we take a look at the EOB and the patient / claim to see that the patient, claim, date of service, etc. meet the test of reasonability. If it doesn't meet the test of reasonability we can pick No or press Esc and figure out what is what. In this case it is obviously the correct claim so we can tap enter, press the space bar or click on the Yes button to answer the question affirmatively. This moves the cursor to the transaction area of the form, inserts and new transaction and leaves us on the Check# field, see Figure 5.

WONKA 1414 CHOCOLATE WAY 95340 (209) 723-6655 63 10 1964 S 2175 555667788A						
15						95.00
Claim#	Status	Date	Prov	Insured	Dx 1	PatientOwes Balance
2445	1	2/14/98	1	1964	71981	95.00
Trans No	T	Date	Check#	Credit#	Description	Amount
5498	C	2/14/98			NEW PT OFFICE VISIT	95.00
5499	P	2/14/98		99204		
		2/10/98				

Figure 5.

In figure 5 the cursor is on the Check# field so we can specify the number of the check from the check register that we are going apply this payment against. If we are not sure whether it has been registered or not we could press F1 to get a browse box view of the register, where we can scroll or search the checks in the register. Since this is the first claim / payment from this check, we have to register this check before we can use it. Probably the easiest way to register a new check is to simply press the insert key when we are sitting right here on the Check# field as shown in Figure 5. After the insert key is pressed the program takes us to the check register input form and inserts a new check record and leaves us sitting on the payer number as shown in figure 6.

600001 Payments Entry Form 2/10/98						
WONKA 1414 CHOCOLATE WAY 95340 (209) 723-6655 63 10 1964 S 2175 555667788A						
15						95.00
Claim#	Status	Date	Prov	Insured	Dx 1	PatientOwes Balance
2445	2	2/14/98	1	1964	71981	95.00
Trans No	T	Check Input Form				Amount
5498	C	Check No: 4 Status: Payor No: ◀ Payor Name: Bank Number: Amount:				95.00
5499	P					
2 of 2						
◀ ▶ Ins Del Browse Payments						

Figure 6

Here in we need to specify the payer. We can press F1 here if we want to get a browse box to the Credits, Payers and Insurance Co table to search for the correct payer. In Figure 6 the mouse cursor (the big arrow on the patient part of the desktop) is pointing at the primary insurance company for this patient. In this case and usually in the case of a primary insurance payment, but not always, this is the number that we will key in where the bullet (the little triangle pointing to the left) is in the Payor No: field of the Check Input Form window. After we enter the Payor No the system will fill in the Payor Name and the Bank Number if the bank number is in this payers record in the Credits table and move us to the Amount field,

see Figure 7. If the bank number is not in the payers record in the Credits table you will be left on the Bank Number field so that can be completed for the deposit slip.

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Check Input Form [ ]
-----
Check No:      4
Status:
Payor No:     2175
Payor Name:   ORANGE SYMBOL
Bank Number:  11-35
Amount:
-----
2 of 2
  
```

Figure 7

Here in Figure 7 in the amount field we input the dollar amount of the entire check. For this example we will enter 140 because or check from Orange Symbol is for \$140.00. As soon as we complete the dollar amount and tap enter, we are returned to the payment input form to the transaction that we had started before we registered the check and Check# and Credit# and Descriptions fields are completed for us and the program is waiting for us to input the dollar amount we want on this particular payment transaction on this claim. See Figure 8.

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= Edit Image Search Options Help Quit
600001 Payments Entry Form 2/10/98
WONKA WILLY W 6/30/52 M Y
1414 CHOCOLATE WAY 95340 (209) 723 - 6655 63 10
1964 S 2175 555667788A
15 95.00
-----
Claim# Status Date Prov Insured Dx 1 PatientOwes Balance
2445 2 2/14/98 1 1964 71981 95.00
-----
Trans No T Date Check# Credit# Description Amount
5498 C 2/14/98 99204 NEW PT OFFICE VISIT 95.00
5499 P 2/14/98 4 2175 ORANGE SYMBOL
2/10/98
-----
Audit Charge Checks ClaimInfo Patient Sched Aging FindClm# DataTbl Go
  
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Figure 8

Here on the amount field as in Figure 8 there is a few things we can do. We can press the asterisk * key to pay the entire amount outstanding on the claim, in this case \$95. Or we can press the slash / key which will go out and add up all payments on check #4 and apply here what is unapplied to check #4, in this case that would be \$140. Or we could press F1 and we would be presented with a calculator in a window so we could do some calculations if necessary. But for the sake of this example, we look at the EOB and see that Orange Symbol paid \$70 for this claim, so we simply key in 70 and press enter. The program inverts the sign of the dollar amount and drops us down on to the comment field where we can look at the record before we finalize it, see figure 9.

5498	C	2/14/98			NEW PT OFFICE VISIT	95.00
				99204		
5499	P	2/14/98	4	2175	ORANGE SYMBOL	(70.00)
		2/10/98				

Figure 9.

After we look at the record in Figure 9, and tap enter we are presented with the “What do you want to do now?” menu as in Figure 10.

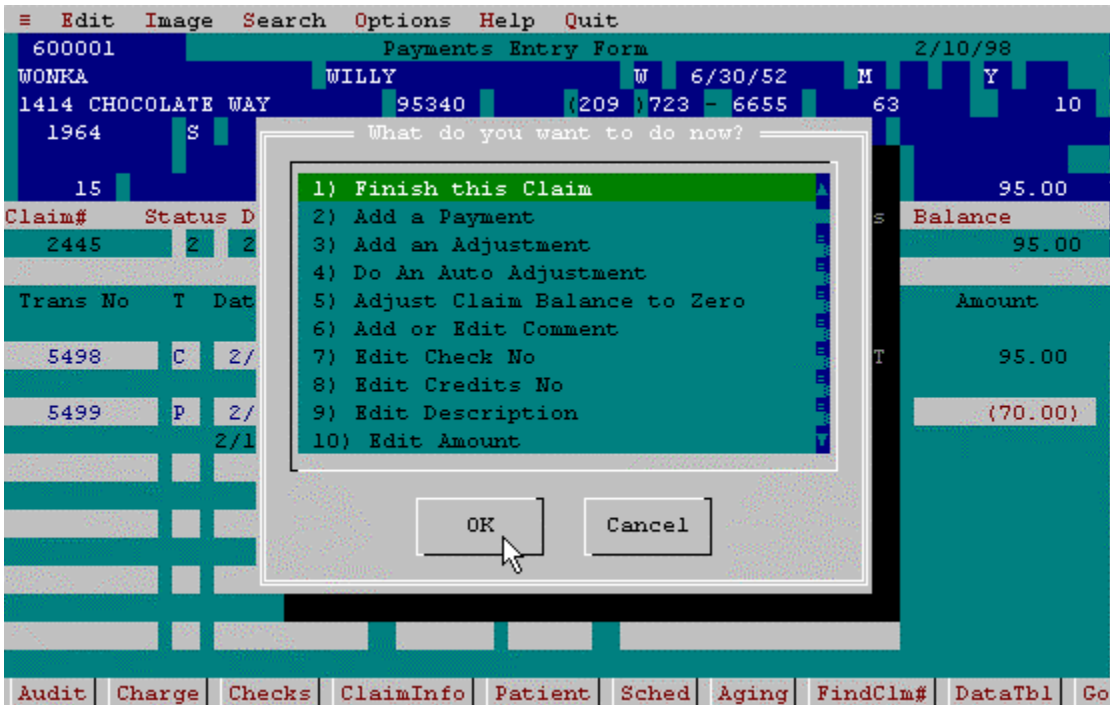


Figure 10

The “What do you want to do now?” Menu

From the “What do you want to do now?” menu (Figure 10) there are 11 different things that you can do. We will briefly discuss these choices here before we proceed with posting our example payments. The 7,8,9 and 10 selections merely easily take you back to those fields where you could change them. The number 2 selection will insert another payment transaction and leave you on the check number field as shown above in figure 5. The number 6 selection will open an editor window in which you can add a comment to this transaction, see figure 11.

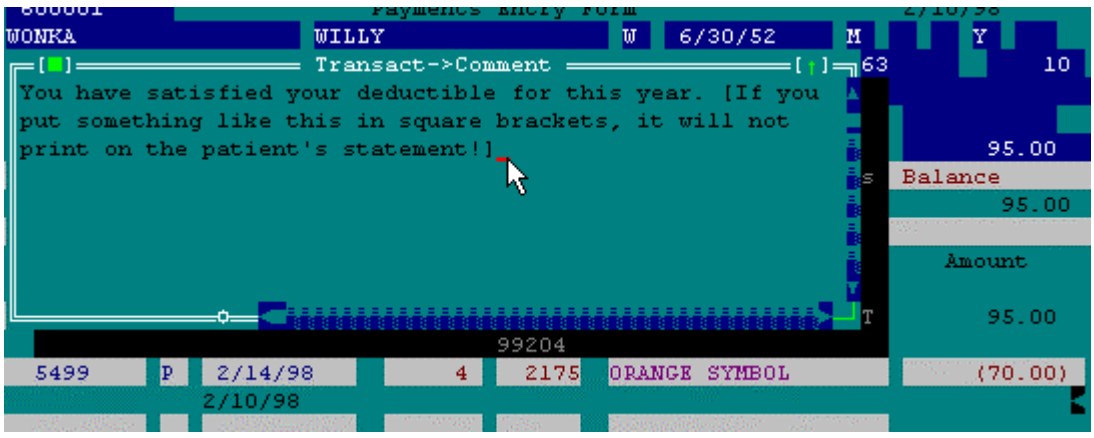


Figure 11

Use the comment (as shown in Figure 11) to further make notes and explanations to the patient or to yourself and your fellow billers about this payment or adjustment or refund as the case may be. Note that text you enclose in square brackets will not appear on the patients statement.