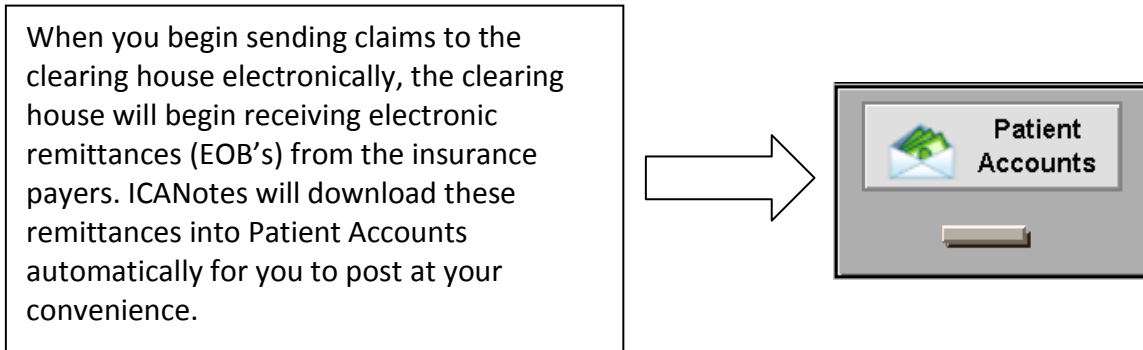


# Auto Post Payments Guide

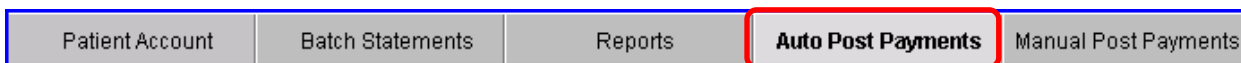
## Requirements:

1. Your practice must be billing insurance claims through ICANotes using an integrated clearinghouse.
2. Claims sent to the clearinghouse must be in the 837 file format



To access the auto post feature, enter the Patient Accounts filing cabinet from the Chart Room, or access Patient Accounts from one of the many patient accounts buttons throughout the program.

You will see five tabs across the top of the Patient Accounts window.



Select the “Auto Post Payments” tab.

Here is what you will see at the top of the Auto Post Payments tab:

Patient Account		Batch Statements		Reports		Auto Post Payments		Manual Post Payments		Chart Room		Back
Search	Service Date Start	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Claim Status Code	<input checked="" type="checkbox"/>	Show Unmatched	<input checked="" type="checkbox"/>	Show Details	<input checked="" type="checkbox"/>	Search Service Charges	Search Patients	Post Matched Payments
	Service Date End	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Clinician/Provider	<input checked="" type="checkbox"/>	Show Matched	<input checked="" type="checkbox"/>	Show Providers	<input checked="" type="checkbox"/>			
Clear All	CPT Code	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Insurance Payer	<input checked="" type="checkbox"/>	Show Posted	<input checked="" type="checkbox"/>	Show Payers	<input checked="" type="checkbox"/>			
	Modifiers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Patient	<input checked="" type="checkbox"/>							

**NOTE:** If you are using TriZetto/Gateway EDI as your clearinghouse, you will need to make sure that you have the checkbox marked for “auto-generate remittances” on the TriZetto/Gateway EDI website. If you are using Navicure, this is automated and there are no other steps necessary for you to activate the auto-post feature.


*We will auto-upload the remittances from your clearinghouse every night at 12:30 am (30 minutes after midnight).*

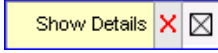
When your data loads it will look similar to this:

Patient Account		Batch Statements		Reports		Auto Post Payments		Manual Post Payments		Chart Room		Back			
Search	Service Date Start	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Claim Status Code	<input checked="" type="checkbox"/>			Show Unmatched	<input checked="" type="checkbox"/>	Show Details	<input type="checkbox"/>	Search Service Charges	Post Matched Payments		
	Service Date End	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Clinician/Provider	<input checked="" type="checkbox"/>			Show Matched	<input checked="" type="checkbox"/>	Show Providers	<input type="checkbox"/>				
Clear All	CPT Code	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Insurance Payer	<input checked="" type="checkbox"/>			Show Posted	<input checked="" type="checkbox"/>	Show Payers	<input type="checkbox"/>	Search Patients			
	Modifiers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Patient	<input checked="" type="checkbox"/>										
Imported Remittances						ICANotes Service Charges									
<b>PGBA, LLC. CAMDEN SC</b> Check Date: 10/2/2013 Check No.: 0060003626SA4 Total Paid: \$118.97															
<input type="checkbox"/>		CPT Code	Billed	Allowed	Adjust.	Paid	Service Date	Service Description	Billed	PR	Adjust.	Paid			
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Primary	9/17/2013	99213	\$100.00	\$64.31	\$35.69	\$64.31	<input type="checkbox"/>	9/17/2013	99213 (Office Pt, Established)	\$100.00	\$0.00	\$0.00	\$0.00
<input type="checkbox"/>	<input type="checkbox"/>														
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Primary	9/24/2013	99213	\$100.00	\$64.31	\$45.34	\$54.66	<input type="checkbox"/>	9/24/2013	99213 (Office Pt, Established)	\$100.00	\$0.00	\$0.00	\$0.00
<b>PGBA, LLC. CAMDEN SC</b> Check Date: 10/2/2013 Check No.: 0060027139SRT Total Paid: \$90.27															
<input type="checkbox"/>		CPT Code	Billed	Allowed	Adjust.	Paid	Service Date	Service Description	Billed	PR	Adjust.	Paid			
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Primary	9/16/2013	99214	\$125.00	\$56.32	\$79.94	\$45.06	<input type="checkbox"/>	9/16/2013	99214 (Office Pt, Established)	\$125.00	\$0.00	\$0.00	\$0.00
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Primary	9/16/2013	90834	\$175.00	\$56.51	\$129.79	\$45.21	<input type="checkbox"/>	9/16/2013	90834 Psychotherapy 45 min.	\$175.00	\$0.00	\$0.00	\$0.00
<input type="checkbox"/>	<input type="checkbox"/>														
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Primary	9/16/2013	99213	\$100.00	\$56.51	\$100.00	\$0.00	<input type="checkbox"/>	9/16/2013	99213 (Office Pt, Established)	\$100.00	\$0.00	\$0.00	\$0.00
<b>BLUE CROSS BLUE SHIELD OF ALABAMA, BIRMINGHAM AL</b> Check Date: 10/10/2013 Check No.: 0033648955 Total Paid: \$292.59															
<input type="checkbox"/>		CPT Code	Billed	Allowed	Adjust.	Paid	Service Date	Service Description	Billed	PR	Adjust.	Paid			
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Primary	10/1/2013	99213	\$100.00	\$100.00	\$31.37	\$31.38	<input type="checkbox"/>	10/1/2013	99213 (Office Pt, Established)	\$100.00	\$0.00	\$0.00	\$0.00
<input type="checkbox"/>	<input type="checkbox"/>														
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Primary	9/19/2013	90847 U6	\$175.00	\$175.00	\$121.50	\$53.50	<input type="checkbox"/>	9/19/2013	90847 FAM PSYTX WPATIENT	\$175.00	\$0.00	\$0.00	\$0.00
<input type="checkbox"/>	<input type="checkbox"/>														
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Primary	9/16/2013	99213	\$100.00	\$100.00	\$62.75	\$0.00	<input type="checkbox"/>	9/16/2013	99213 (Office Pt, Established)	\$100.00	\$0.00	\$0.00	\$0.00
<input type="checkbox"/>	<input type="checkbox"/>														
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Primary	9/26/2013	90792	\$250.00	\$250.00	\$82.15	\$82.15	<input type="checkbox"/>	9/26/2013	90792 Psychiatric Diagnostic	\$250.00	\$0.00	\$0.00	\$0.00
<input type="checkbox"/>	<input type="checkbox"/>														
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Primary	10/1/2013	99214	\$125.00	\$125.00	\$19.00	\$76.00	<input type="checkbox"/>	10/1/2013	99214 (Office Pt, Established)	\$125.00	\$0.00	\$0.00	\$0.00
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Secondary	10/1/2013	99214	\$125.00	\$125.00	\$106.00	\$19.00	<input type="checkbox"/>	10/1/2013	99214 (Office Pt, Established)	\$125.00	\$0.00	\$0.00	\$0.00




In the example above, all the remittances imported are yellow, meaning the program has matched the payments to the service charge the claims were billed out for. This is the ideal scenario. There are no unmatched remittances so these matches can be recorded quickly by



pressing the  button, after which they will turn green indicating that they have been posted.

**NOTE:** If there are matched payments, you may wish to check the  box to display the detail view on all payments that have already been applied to each matched date of service. If you see that the payment has already been recorded, you can either delete the



remittance using the red  or hide it with the grey  before using the  button. Old remits that have already been posted manually may load in when you begin using the auto post feature.

Take a look at the View Options buttons.

Show Unmatched	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Show Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Show Matched	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Show Providers	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Show Posted	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Show Payers	<input checked="" type="checkbox"/>	<input type="checkbox"/>

After matched claims have been posted, you can use your viewing option buttons to filter out or show more details about each remittance or charge.

**Show Posted**   allows you to see all posted remittances.

**Show Posted**   will remove all posted remittances from the list so you can focus your attention on any unmatched remittances or match remittances that still need posting.

Show Unmatched	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Show Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Show Matched	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Show Providers	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Show Posted	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Show Payers	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**Show Matched**   will reveal all remittances that have been matched up to a service charge in Patient Accounts and need to be posted.

**Show Matched**   will hide remittances that have been matched up to a service charge but remain un-posted.

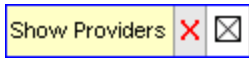
**Show Unmatched**   will reveal all unmatched remittances.

**Show Unmatched**   will hide all unmatched remittances.

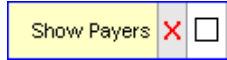
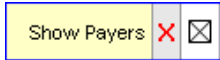
**Show Details**   and **Show Details**   will expand/hide details under each remittance. Here is an example of a remittance showing details:

	CPT Code	Billed	Allowed	Adjust.	Paid	Service Date	Service Description	Billed	PR	Adjust.	Paid
<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	Primary 9/26/2013 90792	\$250.00	\$250.00	\$82.15	\$82.15	<input checked="" type="checkbox"/> 9/26/2013	90792 Psychiatric Diagnostic	\$250.00	\$82.15	\$0.00	\$82.15
	Co-payment Amount		PR 3	\$0.00		9/26/2013	Pmt: AP 0033648955 90792		\$82.15	\$0.00	\$82.15
	Previously paid. Payment for this claim/service may have been provided in a previous		OA B13	\$0.00							
	Charge exceeds fee schedule/maximum allowable or contracted/legislated fee		CO 45	\$82.15							

**Show Details**   will consolidate the remittance to just show the first bright green line of information.



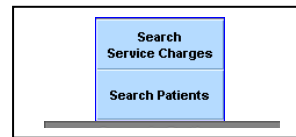
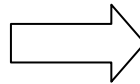
will separate remittances per provider. You will also see a Hide Providers option when the providers are shown.



and will either separate remittances by insurance payer or hide the payers to show all remittances based on your viewing options.

*So now that we know how to load remittances and post matched remittances, as well as view the remittance report based on the information you want to see, what do we do with any unmatched remittances?*

Let's look at the Search Options buttons



Make sure your viewing options are configured so that you are only looking at the unmatched remittances in red.

Patient Account		Batch Statements		Reports		Auto Post Payments		Manual Post Payments		Chart Room		Back			
Search	Service Date Start	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Claim Status Code	<input checked="" type="checkbox"/>			Show Unmatched	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Show Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Search Service Charges	Post Matched Payments
	Service Date End	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Payment Identifier	<input checked="" type="checkbox"/>			Show Matched	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Show Providers	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Clear All	CPT Code	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Clinician/Provider	<input checked="" type="checkbox"/>			Show Posted	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Show Payers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Search Patients	Print
	Modifiers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Insurance Payer	<input checked="" type="checkbox"/>										
				Patient	<input checked="" type="checkbox"/>										


Imported Remittances							ICANotes Service Charges									
					Billed	Allowed	PR	Adjust.	Paid	Service Date	Service Description	Billed	PR	Adjust.	Paid	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	9/17/2013	90837	AH	\$150.00	\$106.18		\$150.00	\$0.00						
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	9/20/2013	90837	AH	\$150.00	\$106.18	\$20.00	\$43.82	\$86.18	9/17/2013	90837 Psychotherapy 60 min.	\$150.00	\$0.00	\$0.00	\$0.00
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	7/28/2013	90837	AH	\$150.00	\$106.18		\$150.00	\$0.00						
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	8/4/2013	90837	AH	\$150.00	\$106.18		\$150.00	\$0.00						
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	8/11/2013	90837	AH	\$150.00	\$106.18		\$150.00	\$0.00						
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	8/18/2013	90837	AH	\$150.00	\$106.18		\$150.00	\$0.00						
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	9/15/2013	90837	AH	\$150.00	\$106.18		\$150.00	\$0.00						

First, use the **Search Service Charges** button. The program will begin to search through all service charges for each patient that had a remittance received. It will try to match up the remittance for each patient who has a matching first name, last name, date of service and CPT code. If a match is found, you will see something similar to this:


## Imported Remittance

## ICANotes Service Charge

Imported Remittance								ICANotes Service Charge							
	Billed	Allowed	PR	Adjust.	Paid	Service Date	Service Description	Billed	PR	Adjust.	Paid				
X X	1	9/17/2013	90837	AH	\$150.00	\$106.18			\$150.00	\$0.00	\$0.00				
						9/17/2013	90837 Psychotherapy 60 min.	\$150.00	\$0.00	\$0.00	\$0.00				

Under the **ICANotes Service Charges** column, you can see the program has found a match. When a match is found and you are confident that it matches the remittance, use the  icon to link the service charge to the remittance. This will turn the remittance entry yellow, indicating that it is matched and ready to post:

X X	Primary	9/25/2013	90847		\$175.00	\$175.00	\$0.00		9/25/2013	90847 FAM PSYTX W/PATIENT	\$175.00	\$0.00	\$0.00	\$0.00
-----	---------	-----------	-------	--	----------	----------	--------	---	-----------	---------------------------	----------	--------	--------	--------

Use the **Post Matched Payments** button to post all matched payments as needed. The  icon allows you to open up the service charge detail screen so you can review the information that will post into the patient's account.

**AutoPost: Service Charge** Done

**Service Charge Detail for**


Balance for this Service Charge belongs to:  Patient  Insurance

Service Charge Details				Payment/Adjustment Summary				Service Charge Totals	
Date of Service	9/24/2013	Site	Behavioral Medicine	Patient		Insurance		Total Charged	\$175.00
Amount Due	\$175.00	Use \$0 Amount Due to record Payment/Adj. not related to a Service Charge		Payments	\$0.00	Payments	\$48.74	Patient Responsibility	\$12.43
Clinician	Courtney Test, LCSW			Adjustments	\$0.00	Contract Adj.'s	\$97.32	Payments	\$48.74
CPT Code/Modifier/Description	90834		90834 Psychotherapy 45 min.	Credits	\$0.00	Recoups	\$0.00	Adjustments	\$97.32
Diagnosis	296.30	300.3		Write-Offs	\$0.00	Write-Offs	\$0.00	Patient Balance	\$12.43
				Bad-Debt	\$0.00			Insurance Balance	\$16.51
				Fees	\$0.00			<b>Balance Due</b>	<b>\$28.94</b>
				Refunds	\$0.00				
				<b>Total</b>	<b>\$0.00</b>	<b>Total</b>	<b>\$146.06</b>		

Insurance Claim Details			Claim Adjustments			Patient Payments/Adjustments				Add Patient Pmt		Add Patient Adj	
Claim Number	File Date	Paid Date	Adjustment Reason	Code	Amount	Date	Code	Type	Payment	Adjust	Edit	Delete	
1	102624493568	9/25/2013	Charge exceeds fee schedule/maximum allowable	CO 45	\$97.32								
2			Coinsurance Amount	PR 2	\$12.43								
3													
						<b>Total</b>		<b>\$0.00</b>	<b>\$0.00</b>				

Patient Insurance		Billing Notes		Insurance Payments/Adjustments				Add Insurance Pmt		Add Insurance Adj	
Carrier	Copay			Date	Code	Description	Payment	Adjust	Edit	Delete	
#1 Medicare Part B Claims				9/24/2013	90834	Pmt: AP 888477495	\$48.74	\$97.32		X	
#2 Tricare For Life/TDEFIC Claims											
				<b>Total</b>		<b>\$48.74</b>	<b>\$97.32</b>				

Billing Code   Sent to Collections

If the program cannot find any matches using the **Search Service Charges** button, your last option is to click on **Search Patients** to see the  icon next to each patient name. This will allow you to quickly view each patient's account activity page to determine why no service charge is found. In this case, it is very likely that the service charge was deleted or never recorded, so you will need to manually add the service charge into the patient account tab and then try to **Search Service Charges** again to match them.