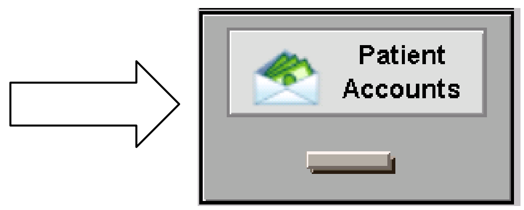
Auto Post Payments Guide

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

When you begin sending claims to the clearing house electronically, the clearing house will begin receiving electronic remittances (EOB's) from the insurance payers. ICANotes will download these remittances into Patient Accounts automatically for you to post at your convenience.

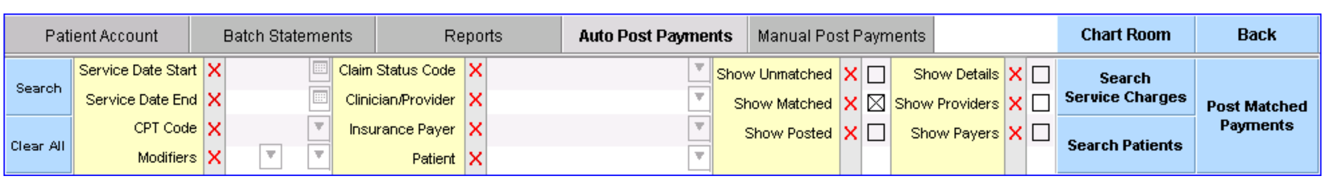


To access the auto post feature, enter the Patient Accounts filing cabinet from the Chart Room, or access Patient Accounts from one of the many patient accounts buttons throughout the program.

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

Select the "Auto Post Payments" tab.

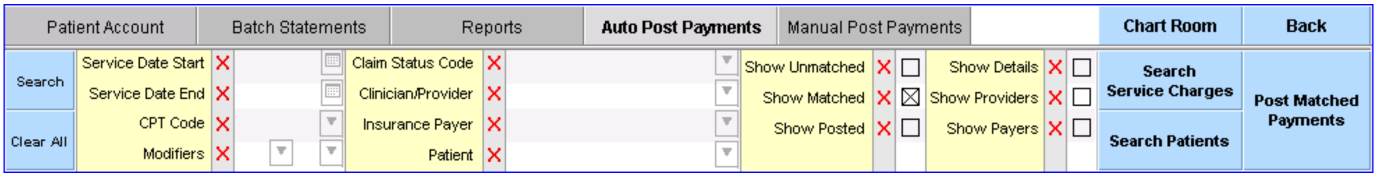
Here is what you will see at the top of the Auto Post Payments tab:



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:

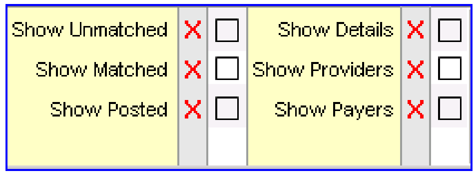


Imported Remittances								ICANotes Service Charges					
PGBA, LLC CAMDEN SC	Check Date: 10/2/2013	Check No.: 0060003626SA4	Total Paid: $118.97										
		CPT Code		Billed	Allowed	Adjust.	Paid	Service Date	Service Description	Billed	PR	Adjust.	Paid
Primary	9/17/2013	99213		$100.00	$64.31	$35.69	$64.31	9/17/2013	99213 (Office Pt, Established)	$100.00	$0.00	$0.00	$0.00
		CPT Code		Billed	Allowed	Adjust.	Paid	Service Date	Service Description	Billed	PR	Adjust.	Paid
Primary	9/24/2013	99213		$100.00	$64.31	$45.34	$54.66	9/24/2013	99213 (Office Pt, Established)	$100.00	$0.00	$0.00	$0.00
PGBA, LLC CAMDEN SC	Check Date: 10/2/2013	Check No.: 0060027139SRT	Total Paid: $90.27										
		CPT Code		Billed	Allowed	Adjust.	Paid	Service Date	Service Description	Billed	PR	Adjust.	Paid
Primary	9/16/2013	99214		$125.00	$56.32	$79.94	$45.06	9/16/2013	99214 (Office Pt, Established)	$125.00	$0.00	$0.00	$0.00
Primary	9/16/2013	90834		$175.00	$56.51	$129.79	$45.21	9/16/2013	90834 Psychotherapy 45 min.	$175.00	$0.00	$0.00	$0.00
		CPT Code		Billed	Allowed	Adjust.	Paid	Service Date	Service Description	Billed	PR	Adjust.	Paid
Primary	9/16/2013	99213		$100.00	$56.51	$100.00	$0.00	9/16/2013	99213 (Office Pt, Established)	$100.00	$0.00	$0.00	$0.00
BLUE CROSS BLUE SHIELD OF ALABAMA BIRMINGHAM AL	Check Date: 10/10/2013	Check No.: 0033648955	Total Paid: $292.59										
		CPT Code		Billed	Allowed	Adjust.	Paid	Service Date	Service Description	Billed	PR	Adjust.	Paid
Primary	10/1/2013	99213		$100.00	$100.00	$31.37	$31.38	10/1/2013	99213 (Office Pt, Established)	$100.00	$0.00	$0.00	$0.00
		CPT Code		Billed	Allowed	Adjust.	Paid	Service Date	Service Description	Billed	PR	Adjust.	Paid
Primary	9/19/2013	90847	U6	$175.00	$175.00	$121.50	$53.50	9/19/2013	90847 FAM PSYTX W/PATIENT	$175.00	$0.00	$0.00	$0.00
		CPT Code		Billed	Allowed	Adjust.	Paid	Service Date	Service Description	Billed	PR	Adjust.	Paid
Primary	9/16/2013	99213		$100.00	$100.00	$62.75	$0.00	9/16/2013	99213 (Office Pt, Established)	$100.00	$0.00	$0.00	$0.00
		CPT Code		Billed	Allowed	Adjust.	Paid	Service Date	Service Description	Billed	PR	Adjust.	Paid
Primary	9/26/2013	90792		$250.00	$250.00	$82.15	$82.15	9/26/2013	90792 Psychiatric Diagnostic	$250.00	$0.00	$0.00	$0.00
		CPT Code		Billed	Allowed	Adjust.	Paid	Service Date	Service Description	Billed	PR	Adjust.	Paid
Primary	10/1/2013	99214		$125.00	$125.00	$19.00	$76.00	10/1/2013	99214 (Office Pt, Established)	$125.00	$0.00	$0.00	$0.00
Secondary	10/1/2013	99214		$125.00	$125.00	$106.00	$19.00	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 Post Matched Payments 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 Show Details 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 X or hide it with the grey X before using the Post Matched Payments button. Old remits that have already been posted manually may load in when you begin using the auto post feature.

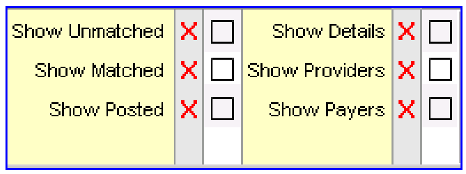
Take a look at the View Options buttons.

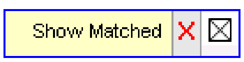


After matched claims have been posted, you can use your viewing option buttons to filter out or show more details about each remittance or charge.

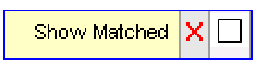
allows you to see all posted remittances.

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.

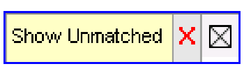




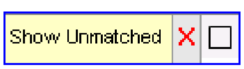
will reveal all remittances that have been matched up to a service charge in Patient Accounts and need to be posted.



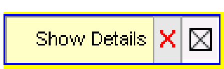
will hide remittances that have been matched up to a service charge but remain un-posted.

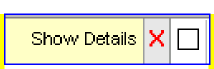


will reveal all unmatched remittances.

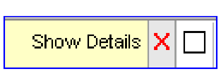


will hide all unmatched remittances.

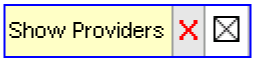


and


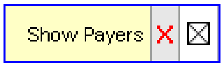
will expand/hide details under each remittance. Here is an example of a remittance showing details:

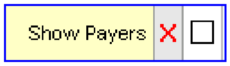


will consolidate the remittance to just show the first bright green line of information.



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

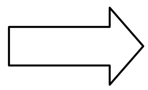


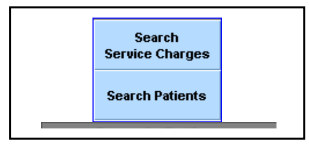
and


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

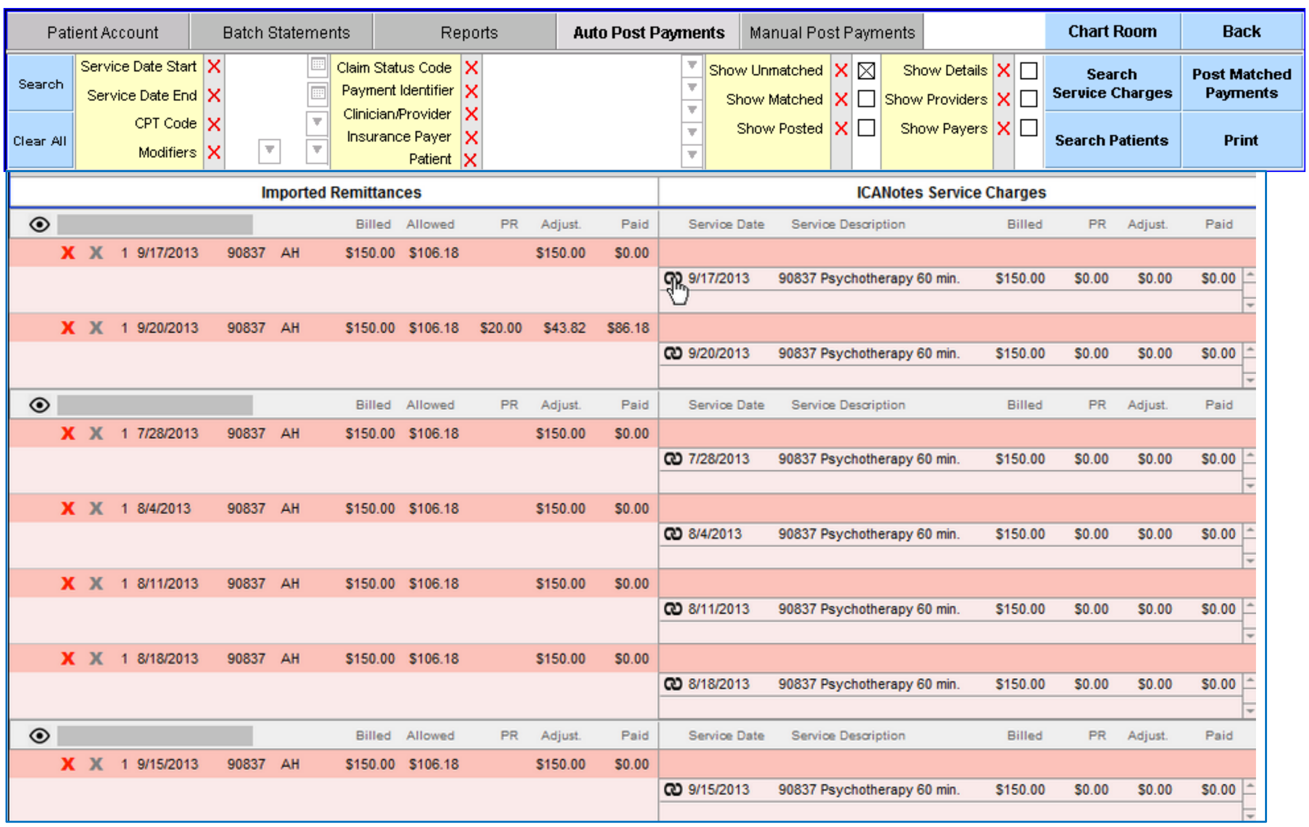
So now that we know how to load remittances and post matched remittances, as well as view the remittance report based on the information you want to see, what do we do with any unmatched remittances?

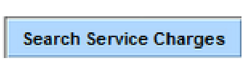
Let's look at the Search Options buttons





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



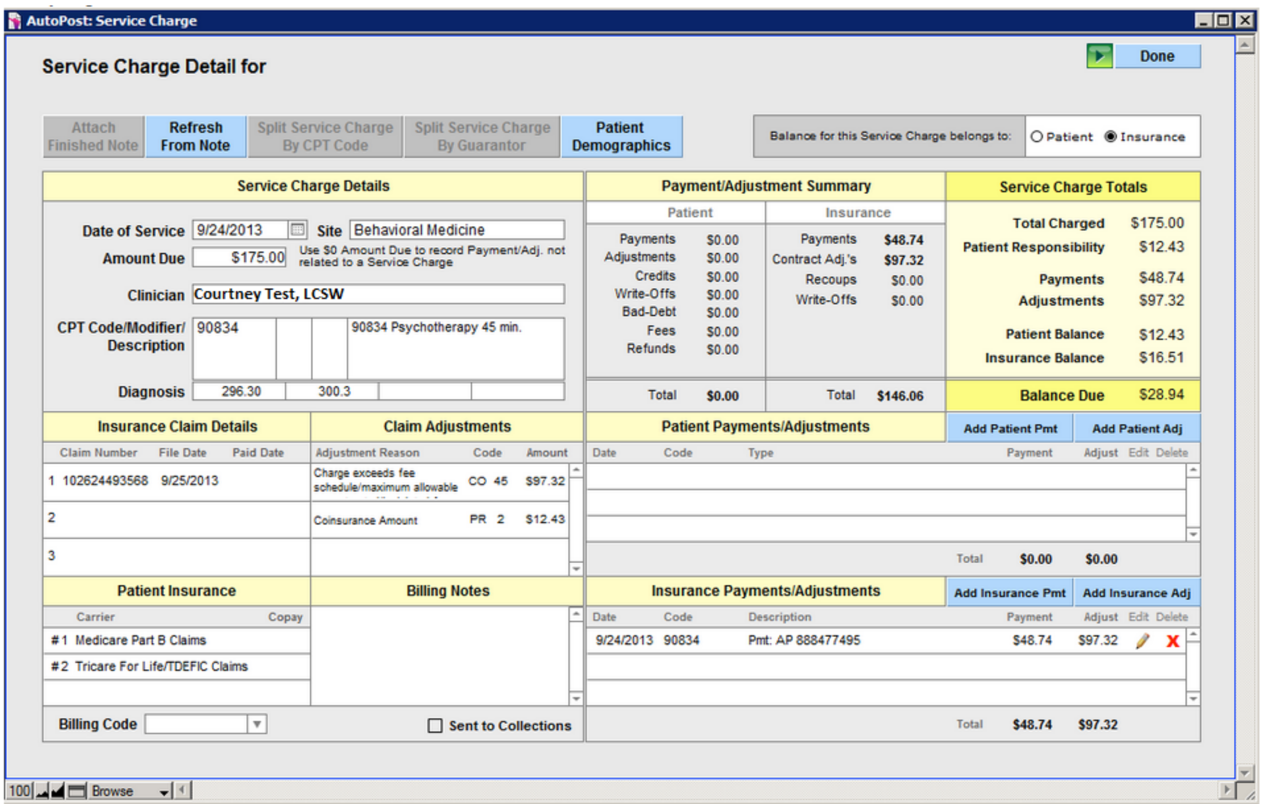
First, use the


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

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:

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.



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.