

Payment posting changes

Payment posting calculation of allowed amount, and popup prompt

There are now 4 "levels" of behaviour of the allowed amount field in payment posting which can be set up for your practice preferences.

1. Do not calculate allowed amounts
2. Calculate allowed for Medicare only, do not prompt for low pay
3. Calculate allowed for all payers, do not prompt for low pay
4. Calculate allowed and prompt for low pay

Contact PA support if you want this option changed – currently all practices are set up on level 0, the least strict. A future update will allow you to set this level in PA Setup.

Payment form

The screenshot shows the 'Payment' window with the following details:

- Batch ID: [blank] Started: [blank] Released: [blank] Batch By: [blank] Posted: [blank] Batch Proof: [blank]
- Payment: **1** [dropdown menu]
- Posted Details: **3** [tab]
- Accounting date: [blank] **2**

1. When you open a batch, the list of checks, with amounts and check numbers, will show in this drop down, making it easier to navigate to a specific payment
2. The accounting date for payments is now displayed, and can be edited for a limited period of time by practice managers, in the same way as you can edit the date received.
3. The posted details tab is an expanded view of the details in a particular payment (basically is the same as the details that show at the bottom of the form, in a larger window) **Note that the columns can be sorted by clicking on the headers**

The screenshot shows the 'Payment' window with the following details:

- Batch ID: 2762718 Started: 02/25/2008 Released: 03/28/2008 Batch By: fred Posted: \$125.00 Batch Proof: \$125.00
- Payment: Amount: \$25.00 Check/Ref #: 6779
- Posted Details: [tab]

Patient A/C#	Claim #(line)	Provider	DOS	CPT	Trans Desc	Amount	Debtor
ST12	1432753(1)	DUCK, DONALD	1/3/2008	99212	Allowed	\$40.00	AETNA
ST12	1432753(1)	DUCK, DONALD	1/3/2008	99212	Patient Responsible	\$15.00	AETNA
ST12	1432753(1)	DUCK, DONALD	1/3/2008	99212	Adjustment 1 - Exceeds Allow...	-\$29.00	AETNA
ST12	1432753(1)	DUCK, DONALD	1/3/2008	99212	Payment 1 - Insurance	-\$25.00	AETNA
ST12	1432753(1)	DUCK, DONALD	1/3/2008	99212	Transfer Svc Line to Sec~ (A...		AETNA HEALTH C

Open Batch

Select Batch
_ □ ×

Batch Display Parameters

Fred Taute batches that have not been released OR that were created within the last month

All Batches for user: - All Users - 1

Use the options below to specify the batches you want to see. Note that you can leave the "from date" field blank to search back to your first batch.

Batch # 2 Batch filter: Unreleased Only 3

Check/ref #: Amount:

From Date: 01/16/2008 To Date: 04/15/2008

Refresh Batch List

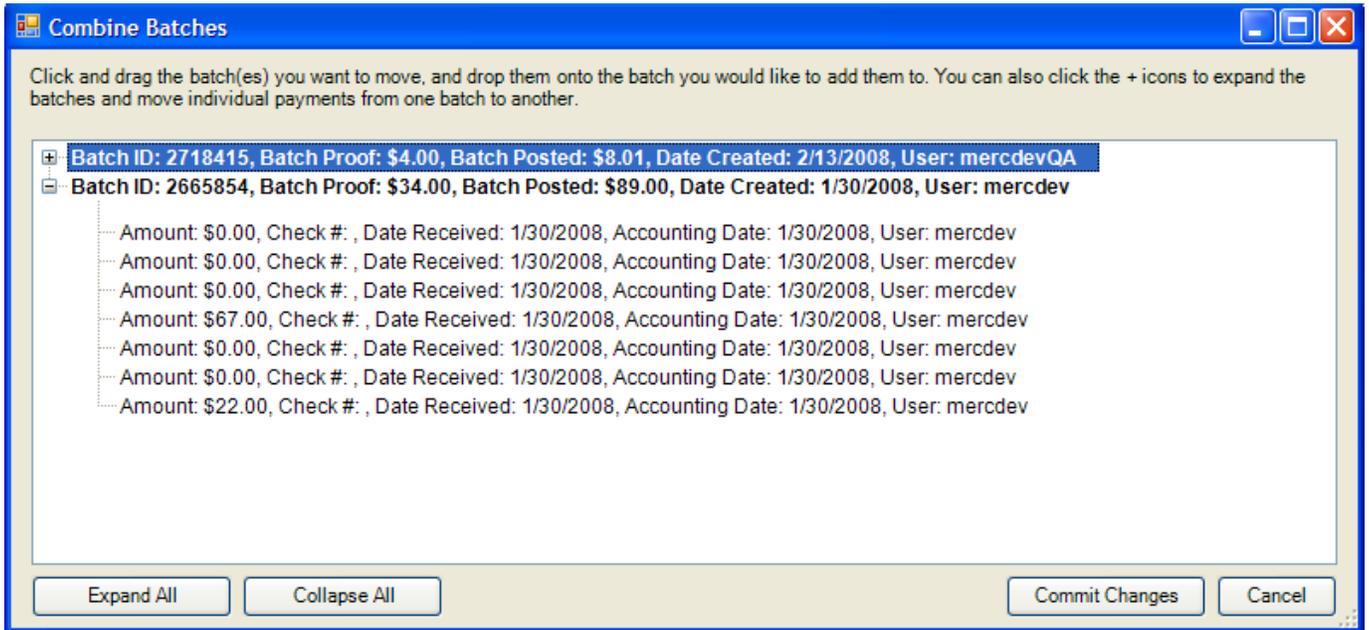
Please select a batch from the list or click cancel to exit this form.

5 <input type="checkbox"/>	Batch ID	Creator	Batch Proof	Batch Posted	3 Date Created	Date Released	Other Info
<input type="checkbox"/>	2723757	mercdevQA	\$413.00	-\$51.00	2/14/2008	//	
<input type="checkbox"/>	2723678	mercdevQA	\$78.00	\$0.00	2/14/2008	//	
<input type="checkbox"/>	2718889	mercdevQA	\$34,534.00	\$100.00	2/13/2008	//	
<input type="checkbox"/>	2718859	mercdevQA	\$54.00	\$4.05	2/13/2008	//	
<input type="checkbox"/>	2718415	mercdevQA	\$4.00	\$8.01	2/13/2008	//	
<input type="checkbox"/>	2705798	cassidyj	\$364.00	\$364.00	2/8/2008	//	4 ERA on hold
<input type="checkbox"/>	2668032	gruaa	\$0.00	\$0.00	1/30/2008	//	
<input type="checkbox"/>	2665854	mercdev	\$34.00	\$89.00	1/30/2008	//	
<input type="checkbox"/>	2654512	mercdev	\$56.00	\$12.00	1/28/2008	//	Payment on hold
<input type="checkbox"/>	2629413	mercdev	\$4.00	\$0.00	1/21/2008	//	
<input type="checkbox"/>	2629385	mercdev	\$3.00	\$0.00	1/21/2008	//	
<input type="checkbox"/>	2629267	mercdev	\$4.00	\$222.00	1/21/2008	//	
<input type="checkbox"/>	2629194	mercdev	\$6.00	\$2.00	1/21/2008	//	
<input type="checkbox"/>	2629181	mercdev	\$6.00	\$1,414.66	1/21/2008	//	Payment on hold
<input type="checkbox"/>	2615196	gruaa	\$0.00	\$10.00	1/16/2008	//	Payment on hold

6 Release Selected
 Combine Selected 7
 OK
 Cancel

Hopefully most of the new features here are self-evident. Some notable notes

1. You can use the drop down to search for batches by user, or all users
2. Fields to enter batch number, check number, amount
3. Column that shows posted amount, makes it easier to use our new bulk release (6)
4. Info column to flag ERA batches, and any with payments on hold (blue)
5. Check boxes that allow you to have your wicked way with more than one unreleased batch at the same time! When checked you get to use 6 or 7
6. Will release all checked batches, subject to our usual limitations that all is posted and balanced. This should make life a lot easier – you can post all your batches for the day, then come and release them all in bulk.
7. Allows you to combine or move payments from one batch to another, next.

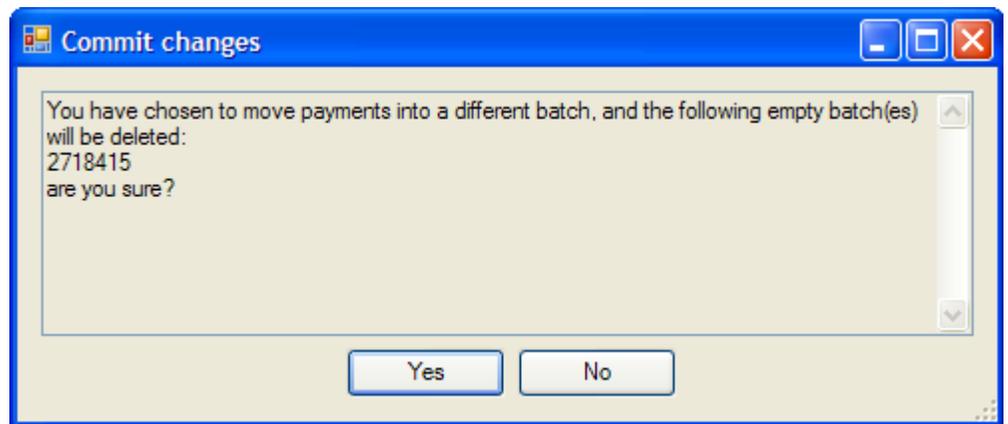


Here you can play around without worrying that you will break anything – click the plus button, drag batches onto each other, or payments from one batch to another. The grid will then change to show your payments with a label that identifies which batch they have moved from.

Nothing will actually be done until you are happy with your work, and click on the “Commit Changes” button.

Then you will get one last chance to review what will be done to your batches before taking the plunge.

When done you can refresh the batch list and your changes will reflect there.



Patient unapplied payments

Patient	Acct Nbr	Date Received	DOS	Check/Ref #	Amount	Debtor
WHITE, JENNIFER	ST64	2/3/2003...	2/18/200...	00345	\$300.00	WHITE, JENNIFER
TYSON, MIKE	ST224	3/10/200...	3/9/2006...		\$100.00	UTICA NATIONAL INSURAN...
THORNTON, JIM	ST223	3/10/200...	3/9/2006...		\$100.00	UPMC
TEST10, TEST10	ST322	1/30/200...	1/29/200...	ABC TEST	\$10.00	TEST10, TEST10
TEST10, TEST10	ST322	1/30/200...	1/29/200...	ABC TEST	\$134.00	TEST10, TEST10
TEST1, TEST1	ST320	1/28/200...	1/28/200...	TEST1	\$0.99	TEST1, TEST1
TEST1, TEST1	ST320	1/28/200...	1/28/200...	TEST1	\$20.00	TEST1, TEST1
TEST1, TEST1	ST320	1/28/200...	1/28/200...	TEST1	\$35.00	TEST1, TEST1
TEST, ACCOUNT	ST310	12/4/200...	12/4/200...		\$1.00	TEST, ACCOUNT
TEST, ACCOUNT	ST310	12/4/200...	12/4/200...		\$54.00	TEST, ACCOUNT
TEST, JOHN	ST34	2/13/200...	2/13/200...		\$14.00	TEST, JOHN

Buttons: Refresh, Go To Payment, OK, Cancel

1. Column headers are now sortable, to make it easier to hunt through the list for a payment by name, account number, date, amount or other column
2. Any payments that are already applied, but are in a payment on hold, will show up in blue. To save them, you can select the payment line, and click on "Go to Payment"

When saving a claim for a patient with unapplied payments, you will get a prompt like the following one:

Billing

This patient has \$2.00 in unapplied payments which are not linked to a claim. Would you like to apply any of these to this claim?

Yes No

To apply all or part of the unapplied payment to your current claim, click yes

You can now use the check boxes on the left to select multiple payments.

The options at the bottom of the form allow you to define a specific amount to apply, in the event that the unapplied amount is greater than the amount you need. These payments will be applied after the claim has processed in PA.

<input type="checkbox"/> Patient	Acct Nbr	Date Received	DOS	Check/Ref #	Amount	Debtor
<input checked="" type="checkbox"/> FORTE, DAVID	ST1313	2/1/2008 12...	2/1/2008 12...		\$2.00	FORTE, DAVID

Options: Apply all selected Amount \$0.00 Apply partial \$0.00

Buttons: Refresh, Apply payments, Cancel

Patient Form Changes

The screenshot shows a software window titled "Patient" with a menu bar (File) and a toolbar (New, Save, Print, Claim, Delete, History, Notes, Statement). The "Workers Compensation" tab is active. The form has two main sections: "Add by Employer" (selected) and "Add by Insurance". The "Add by Employer" section has a red circle "1" around the "Employers:" dropdown. The "Add by Insurance" section has a red circle "2" around the "Insurance Plan:" dropdown. Below these are fields for "Insurance Plan:", "Insurance Address:", "Case Number:", "WC Begin Date:", and "WC End Date:". Buttons for "Save", "Remove", and "New" are at the bottom right.

We have eliminated the double step of adding an employer, then workers comp record for workers comp.

1. You can now select an employer directly from the list of companies in this region, which will then show the insurance linked to the company. OR
2. You can add from this side of the form, which lets you pick by insurance first.

Either way, when you are done, you add your records to the workers comp grid as usual. This will then add an employer record to the patient demographics in the background.

Your "preference" of whether to add by employer or insurance will also persist on your PC.