





## New features

### Payment history

From now on, we will log changes made to payments. If you load a payment on Payment Application and click the [+] button to the left of the Payment list, you will see a table that shows the history of changes made to the payment.



 + Payment: Amount: \$0.00 Check/Ref #:

|   - Payment: Amount: \$0.00 Check/Ref #: <input type="text"/> |                    |               |                 |                      |                     |
|---|--------------------|---------------|-----------------|----------------------|---------------------|
| Batch   | Status             | Date Received | Accounting Date | Date Saved           | User                |
| 1187989   | Hold               | 11/20/2006    |                 | 4/17/2009 4:23:42 PM | Dev Dept, Merced... |
| 1187989   | Saved (Posted S... | 11/20/2006    | 11/26/2006      | 4/17/2009 4:27:02 PM | Koh, Anton          |
| 1187879   | Moved              | 11/20/2006    | 11/26/2006      | 4/17/2009 4:28:27 PM | Koh, Anton          |
| 1187879   | Saved              | 1/1/2001      | 11/26/2006      | 4/17/2009 4:31:29 PM | Koh, Anton          |
| 1187879   | Saved              | 2/2/2002      | 11/26/2006      | 4/17/2009 5:18:35 PM | Koh, Anton          |

Since payment history has not been logged before, all of your existing payments will only have one history record each until you modify them.

## Modified features

### ERA amount editing on Payment Application

We've made some changes to transaction posing via the cells on the *ERA Details* tab of *Payment Application*.

| DOS From   | DOS To     | CPT          | Remark | Charges  | Allowed  | Deduct | Coins  | Adj Code | Adj Amnt            | Payments             | Other Pmts | Other Adj | New Bal  |
|------------|------------|--------------|--------|----------|----------|--------|--------|----------|---------------------|----------------------|------------|-----------|----------|
| 01/15/2009 | 01/15/2009 | 95165        |        | \$260.00 | \$178.20 |        |        | CO 45    | <del>-\$81.80</del> | <del>-\$178.20</del> | \$0.00     | \$0.00    | \$222.00 |
|            |            |              |        |          |          |        |        | 1185     | \$0.40              | -\$0.40              |            |           |          |
| Pt Resp    | \$0.00     | Claim Totals |        | \$260.00 | \$178.20 | \$0.00 | \$0.00 |          | \$0.00              | -\$178.60            |            |           |          |

Debtor: 1~ ANTHEM BCBS (157983) LOUISVILLE, KY 41

Transaction: Payment 1 - Insurance

CR: Amount: -\$15.00 Original ERA Amount: -\$178.20

Show All Insurance

Remarks:

Save Changes

1 / 1

Go

Adjustments: \$5,559.30 Refunds: \$0.00 Payments: -\$1,680.03

1. Now if the patient has an insurance corresponding to the debtor of the loaded ERA, then you can edit the amount of the transaction posted via an Adjustment or Payment cell.
2. The original amount will still be shown in the cell and in the new Original ERA Amount field below (when this cell is selected).
3. If the amount of the posted transaction is different from the Original ERA Amount, then the original ERA amount shows in the cell, but with a strike-through line to alert you to the fact the amount was changed.
4. The New Bal cells still base their values on the posted amounts.

### ERA Interest transactions

Now, when an interest payment is received where the system has auto corrected this for you with in interest adjustment, they are shown on separate lines (previously this was shown by the payment cell being a lighter shade of green).

### Service From in Pre-Authorizations

We've made some tweaks to the pre-authorization logic:

1. If you load a claim that has a line authorized by some pre-authorization which is now marked as inactive, then you will see a 'CONFLICT -' label in the Pre-Authorization column on Claim-Details before the pre-authorization information.
2. The same label will be shown for pre-authorized lines of a loaded claim that have their 'Service From' field not in the insurance's effective period.

| Save Remove |          | Scroll right for Pre-Auth summary info |         |   |
|-------------|----------|--|---------|---|
| Pointers    | Charges  | Remarks                                | Amnt Pd | Pre-Authorization                           |
| 1           | \$234.00 |  | \$0.00  | CONFLICT - 1 visit of Auth#: 2YH2YYYYRWY, # |

3. The set of pre-authorizations that may be picked for a claim line when adding one now depends on its 'Service From' field.

## Fixes

### Encounter Forms – no overlapping

Information will no longer overlap on encounter forms. It is truncated instead.

|                          |                          |                           |                          |
|--------------------------|--------------------------|---------------------------|--------------------------|
| LOVELAND FAMILY P...     | <b>Patient: LF10083</b>  | <b>Primary Insurance:</b> | <b>Date: 04/15/2009</b>  |
| PO BOX 640865            | AUGUSTINO FERNAN...      | CUSTOM DESIGN BE...       | Total Balance: \$0.00    |
| CINCINNATI, OH 45264     | 1234 SOMEPLACE FA...     | 3737 WEST FORK RD         | Patient Balance: \$0.00  |
| (513) 530-0340           | THE CITY, TX 54321       | CINCINNATI, OH 45247      | Insurance Balance:\$0.00 |
| <b>Tax ID:31-1330268</b> | Ph #: (123) 456-7890     | Pol. No.: 123456789       | <b>Last Diagnosis:</b>   |
|                          | DOB: 08/08/2000 [8 ye... | Grp. No.: 0987654321A     | <b>Referral Source:</b>  |
|                          | SSN: 0                   | CoPay:                    |                          |

### Claim Notes shown on Claim Transaction Detail form (CTD)

Claim notes are now back on CTD.

### Claim dates on Claim general

Current Dates of claims are back on Claim-General.

## Known Issues

If you use the checkbox to post a new payment to unapplied, the payment history will show two lines, as the move to unapplied is added as an extra item during processing.

### ERA print units

Units have been added to ERA printing in the web portal as a short term fix. These will be added as part of the ERA printing in billing soon.