



BILLING TIPS

Scenario #1: Insurance Carrier pays on claims twice now request REFUND

Example, in this scenario the charge is \$24.00 – insurance pays “out of network” \$12.00. Biller writes off balance.

Later the Insurance carrier sends a new EOB having realized they made a mistake and this provider is actually “in network”, and should be as in network.

Insurance sends in 2nd payment which must now be posted against this account, however, the account balance is 0 with the original payment and writeoff.

Insurance Payment Posting

Payment Information:

Ins. Type: All Batch No.: Receipt 1 of 1
 Receipt Date: 10/01/2008 Deposit Date: 00/00/0000 Receipt No.: REC0000532
 Doctor: All Amount: 200.00
 Payment Type: Check Bank: Check No.:
 Received By: Jones, Debra Adjustment: None .00 Refund Amount: 0.00
 Note: Remain to Post: 188.00

EOB:

Patient*	Service	CPT	Claimed	Charge	Rec.	W/O	Paid	Co-Ins.	Ins.	Pt. Resp.	Writeoff	Codes	EOB	Balance
> Danner, MARY (PT0000165)	04/10/2006	90772	24.00	24.00	12.00	12.00	12.00	.00	.00	.00	12.00	✓		0.00
2. Danner, MARY (PT0000165)	04/10/2006	J3420	5.00	5.00	0.00	5.00	.00	.00	.00	.00	5.00			0.00
3. Danner, MARY (PT0000165)	04/10/2006	99213	84.00	84.00	0.00	84.00	.00	.00	.00	.00	84.00			0.00

In order to post the new payment, you must first put back in the original paid and adjusted amounts returning the charge to it's original amount.

To do so, open the Insurance Payment Posting. Leave the Amount of payment as 0 or blank. Choose the patient, but note since this charge was marked PAID the charge is not visible. When bringing up the patient, you must put a ✓ in “Show Paid” and choose the charges which are now 0.

Pending Bills

Doctor Name: Patient Name:
 Show Paid: ☒ Service Date From: 00/00/0000 To: 00/00/0000 Show Patient Claims: ☒ Retrieve

Serv. From	Claim Date	CPT	Claimed	Received	Writtenoff	Claimed To	St.*	Payment From	Paid	Pat. Resp.*	Claim	Doctor
> <input type="checkbox"/> 04/10/2006	10/16/2007	90772	24.00	12.00	12.00	Aetna	P	Aetna	0.00	0.00	0.00	Alvarado, CH
2 <input type="checkbox"/> 04/10/2006	10/16/2007	J3420	5.00	0.00	5.00	Aetna	P	Aetna	0.00	0.00	0.00	Alvarado, CH
3 <input type="checkbox"/> 04/10/2006	10/16/2007	99213	84.00	0.00	84.00	Aetna	P	Aetna	0.00	0.00	0.00	Alvarado, CH



IB:

Patient*	Service	CPT	Claimed	Charge	Rec.	W/O	Paid	Co-Ins.	Ins.	Pt. Resp.	Writeoff	Codes
Danner, MARY (PT0000165)	04/10/2006	90772	24.00	P 24.00	12.00	12.00	-12.00	.00		.00	.00	
Danner, MARY (PT0000165)	04/10/2006	J3420	5.00	P 5.00	0.00	5.00	.00	.00		.00	.00	
Danner, MARY (PT0000165)	04/10/2006	99213	84.00	P 84.00							.00	

Intelligent Medical Software (IMS)

? This amount is less than min. expected amount: 0
Do you want to continue?

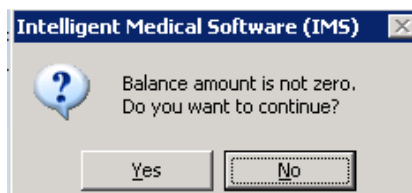
Yes No

Begin with putting back in the payment of -\$12.00 click ok to proceed with the warning.
Input the -\$12.00 for the write off as well.

Note the Receipt# as this will be needed shortly when refunding the insurance.

EOB:

Patient*	Service	CPT	Claimed	Charge	Rec.	W/O	Paid	Co-Ins.	Ins.	Pt. Resp.	Writeoff	Codes	EOB	Balance
1. Danner, MARY (PT0000165)	04/10/2006	90772	24.00	P 24.00	12.00	12.00	-12.00	.00		.00	-12.00			24.00
2. Danner, MARY (PT0000165)	04/10/2006	J3420	5.00	P 5.00	0.00	5.00	.00	.00		.00	-5.00			5.00
> Danner, MARY (PT0000165)	04/10/2006	99213	84.00	P 84.00	0.00	84.00	.00	.00		.00	-84.00			84.00



Note now the Balance to the far right is no longer 0.

SAVE.

When saving you will get the warning box, click YES and SAVE.

Now it is time to add the new insurance payment. Click the + and input the insurance payment and adjustments.

NEXT STEP: Refund Insurance

To refund the insurance carrier click on **Billing | Refund**

Refund Posting

Refund Information:

Ins Type: All

Date: 10/24/2008 Doctor: All Refund No.: REF0000004

Refund To: Insurance Amount: .00

Refund Type: Check Bank: Check No.:

Refunded By: Note: Remain to Post: 0.00

New Refund

Search

Pending

Click **Pending**

Using the **Receipt#** find your receipt, input the amount of the refund and SAVE.
It will prompt you to print the refund.

DONE.



Scenario #2: Insurance overpaid on a patient account. In this scenario we will post the individuals' line item and note it as a refund.

From Insurance Payment Posting, enter the amount of the check.
Input the patient name, however, since the charge was paid and is now 0, you must click the "show paid". Choose the charge like and return to the Insurance Payment Posting screen.

When entering the payment amount you will be warned and prompted to set this as "over paid". Click Yes.

EOB:

Patient*	Service	CPT	Claimed	Charge	Rec.	W/O	Paid	Co-Ins.	Ins.	Pt. Resp.	Wri
> Danner, MARY (PT0000165)	04/10/2006	99213	84.00	P 84.00	61.25	22.75	12.00	.00		.00	

Intelligent Medical Software (IMS)

? Paid amount cannot be greater than Claimed amount. Do you want to set Over Paid?

Yes No

Next, click the box at the right of the Balance Amount of 0 ☐ and note the Over Paid amount is there. **SAVE.**

W/O	Paid	Co-Ins.	Ins.	Pt. Resp.	Writeoff	Codes	EOB	Balance
2.75	45.00	.00		.00	.00			0.00

Adjustment

Over Paid: 45.00

Refund Amt.: .00 Refund Date: 00/00/0000

Refund Ref.:

Ok Cancel

To REFUND go to the patient ledger. You can do so quickly by clicking on the patient head icon "Wallie" and choosing patient ledger.



In the Patient Ledger you will see the note of Overpaid.

			10/24/08	IR	Reverse Writeoff to Aetna	5.00
99213	25	1.00	04/10/06	CH	OFFICE VISIT EST. LEVEL 3 292(Paid)	84.00
>>			10/24/08	IR	Payment from Aetna Overpaid : 45.00	-45.00
			10/24/08	IR	Payment from Aetna	-61.25

To Refund you must right click on the line with the Overpaid amount and choose **Refund**.

OFFICE VISIT EST. LEVEL 3		2347890
Payment from Aetna		Add...
Overpaid : 45.00		Edit...
Payment from Aetna		Delete...
Writeoff from Aetna		Set Color
Writeoff from Aetna		Write off
Reverse Writeoff to Aetna		Payment Code History...
		Return Check...
		Refund...
		Adjust to Charge...
		View EQB...
		Show Edit Log Detail
-134.00	PW	

Refund Posting										
Refund Information:										
Ins Type: Insurance Plan		Date: 10/24/2008		Doctor: Alvarado, CHARLES		Refund No.: REF0000005				
Refund To: Insurance		Insurance: Aetna (232) AET14		Bank:		Amount: 45.00		Check No.:		
Refund Type: Check		Refunded By:		Note:		Remain to Post: 0.00				
Pending Over Payment:										
✓	Sel	Date	Receipt	Service Date	CPT	Patient Name	Amount	Unapp. Amt	Refund	Balance
>	✓	10/24/2008	REC0000535	04/10/2006	99213	Danner, MARY	45.00	45.00	45.00	0.00

The Refund Posting screen will appear. All the necessary information will pre-populate this screen.

Click to **SAVE**. You will be prompted to print the refund – which is by choice.

Below is a sample of the printed Refund.

Office 55
4455 Medical Dr San Antonio, TX 78229
Phone: (510) 555-6665 Fax: (510) 555-1703
Refund Detail

Refund Date: 10/26/2008		Doctor: Alvarado, CHARLES				Refund No:	REF0000007	
Refund To: Insurance		Insurance Plan: AccuMed:				Refund Amount:	5.00	
Refund Type: Check		Bank:				Check No:		
Refund By:								
Refund(s):								
Date	Receipt No	Service From	CPT	Patient	Amount	Unapply Amount	Refund Amount	Balance
09/08/2008	REC0000507	05/19/2004	99215	Smith, Theodore	5.00	0.00	5.00	0.00
Total:							5.00	



Scenario #3: Patient made payment and check is returned insufficient funds.

The first question is, does your office charge a “return check fee”?

If **YES**, then you must have a return check **CPT** code setup.

Go to Setup | Billing | CPT and enter this new CPT code with fee and SAVE.

Active: ☒ CPT Code 1 of 1

Code* RETCK Claim Form Code:

Description* Returned check Type:

Class* Office Posting Method: Standard

Standard Fee: 35.00 Allowed Amount: 35.00

Expected Type: Expected Amount/?: .00

Classification: NDC Code:

Claim Note:

Procedure Time: (Minutes) Procedure Type:

Next, this CPT must be linked in the Billing Parameter.

Go to Setup | Parameter | System | Bill General and link the “Default CPT for Return Check Charge” with the CPT code you have setup. From this same window you must choose YES to the “Charge Patient for Return Check”.

Parameters

System Parameters

- Modules/Features
- Document Path
- Visit Note
- Prescription
- Bill General
- Charge Posting
- Payment Posting
- Insurance Claim
- Schedule
- Check In/Out
- Report Print
- PDA
- Patient Portal
- Other

Parameter	Value
Default POS	11 Office
Default TOS	01 Medical care
Default Copay	.00
Rebill paid bills	Yes
Patient Statement Days	
Minimum balance for patient statement	5.00
Minimum balance for aging summary	.00
Default Patient Statement format	Format 1
Show copay in Patient Statement	Yes
Default CPT for Return Check Charge	RETCK
» Charge Patient for Return Check	Yes
Accounting Day Close for Bills by	Created Date



From the Patient Ledger, locate the patient payment which was returned.

Right click on the check payment and choose Return Check.

06/25/08	PR	Payment from Patient	-10.00
06/25/08	PR	Payment from Patient	-20.00
06/25/08	PR	Payment from Patient	-20.00
06/24/08	IW	Writeoff from Aetna Epo	-29.63
06/24/08	IR	Payment from Aetna Epo (026654785412) Transferred to Patient : 30.00	-73.37
05/27/08	PR	Reverse Payment to Patient	20.00
05/08/08	IR	Payment from AccuMed Transferred to Aetna Epo : 45313.12	0.00
05/08/08	IR	Payment from AccuMed	0.00

If the payment was applied to multiple charges, those charges will be listed. All information will be automatically linked to this check.

NOTE: You can elect to NOT charge the patient the Return Check Charges by removing the ✓ in the Charge Patient.

Reverse Patient Payment

Payment Information:

Patient Name: Smith, Theodore (PT00002543)

Doctor: Alvarado, CHARLES

Receipt No: REC0000487

Receipt Date: 06/25/2008

Received by: Betty, Nurse

Amount: 50.00

Refund Amt: 0.00

Unapplied Amount: 0.00

Payment Type: Cash

Bank:

Check No:

Statement Note:

The check you provided was returned as insufficient funds. Please pay promptly

☒

EOB:

	Service	CPT	Charge	Pat. Pay	Paid	Co-ins	Writeoff	W*
<input checked="" type="checkbox"/>	1.	5/5/2008	99211	100.00	20.00	20.00	0.00	0.00
<input checked="" type="checkbox"/>	2.	3/13/2003	99214	133.00	40.00	20.00	0.00	0.00
<input checked="" type="checkbox"/>	3.	5/6/2008	99213	84.00	20.00	10.00	0.00	0.00

* = Reverse Writeoff

Patient:

Charge Patient: ☒

CPT* (?) RETCK

Charge* 35.00

Charge Date* 10/26/2008

Doctor* Alvarado, CHA

Office* 00001

Ok

Cancel



Scenario #4: Recoup / Take-back

To record a recoup or take-back, from Insurance Payment Posting, enter the patient name in the patient field. When the patient selection window appears place the ✓ in the “show paid” in order to bring forward the charge line which the funds must be added back to.

EOB:														
Patient* (?)	Service	CPT	Claimed	Charge	Rec.	W/O	Paid	Co-Ins.	Ins.	Pt. Resp.	Writeoff	Codes	EOB	Balance
> Smith, Theodore (PT000025)	05/05/2008	99213	20.00	S 84.00	10.00	0.00	10.00	.00		.00	.00			10.00
2. Smith, Theodore (PT000025)	07/24/2008	99213	84.00	P 84.00	80.00	0.00	80.00	.00		4.00	.00			0.00
3. Smith, Theodore (PT000025)	08/25/2008	99202	50.00	P 80.00	45.00	0.00	45.00	.00		5.00	.00			0.00

Input the amount of the “recoup / take-back” as a negative, this will now change the balance from 0 to the appropriate amount.

EOB:														
Patient* (?)	Service	CPT	Claimed	Charge	Rec.	W/O	Paid	Co-Ins.	Ins.	Pt. Resp.	Writeoff	Codes	EOB	Balance
1. Smith, Theodore (PT000025)	05/05/2008	99213	20.00	S 84.00	10.00	0.00	10.00	.00		.00	.00			10.00
2. Smith, Theodore (PT000025)	07/24/2008	99213	84.00	P 84.00	80.00	0.00	80.00	.00		4.00	.00			0.00
3. Smith, Theodore (PT000025)	08/25/2008	99202	50.00	P 80.00	45.00	0.00	45.00	.00		5.00	.00			0.00
> Smith, Theodore (PT000025)	03/13/2003	99214	133.00	P 133.00	70.00	43.00	-70.00	.00		.00	-43.00			113.00

Continue recording the remainder of the insurance check. Note the patient will now have a balance in the patient ledger as this charge is now “unpaid”.