

Posting Payments

Revised March 9, 2010

The Insurance Payment posting functions has been enhanced to offer payment reconciliation for multiple occurrences of the same prescription claim. You will be able to reconcile not only Payable responses but multiple Payable responses and Reversals for the same prescription.

The system now creates individual record (in a file called the Open Claims Queue) for each prescription claim billed or reversed. Later you can post payments and reconcile with each successful transmission of the Rx claim (Payable or Reversed).

Since the Open Claims Queue did not exist prior to Legacy Pharmacy Plus version 4.38a, when you upgrade your software version from one previous to 4.38a the upgrade will create an Open Claims Queue with up to six months of all your open claims (claims that have an authorization amount but no check has been posted). Thereafter, every claim that is Payable or Reversed will be copied to the Open Claims Queue. If you did not receive a response for a claim, the claim will NOT be placed in the Open Claim Queue, but you will have a way to manually copy the Rx claim to the Open Claims Queue via the payment entry screen. Additionally, you will be able to view or print all the open or paid claims in detail, find out the Open Claim balance for a given insurance or view a detail posting by check number.

POSTING AN INSURANCE PAYMENT

This is set in the system configuration screen.

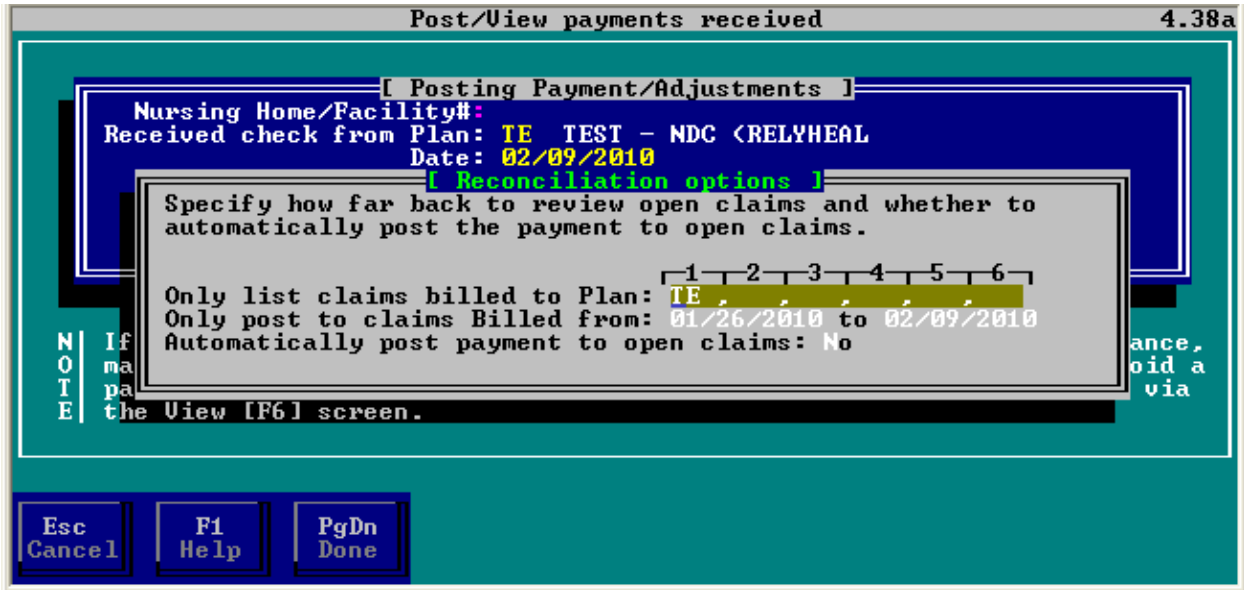
Enter the check information.

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Command Prompt - go
Post/View payments received 4.38a
[ Third party payment
Nursing Home/Facility#:
Received check from Plan: TE TEST - NDC
Date: 02/09/2010
Check amount: 38.40
Reference: 832726
Description: Payment-Thank you
Itemize claim payment: Yes

N | Enter the check amount to post payment, enter a negative amount to post
O | an adjustment (paid claims will be displayed). You can Void a payment
T | via the payment history [F5] key or you can manually Add a claim to the
E | Open Claim Queue via the View [F6] screen.

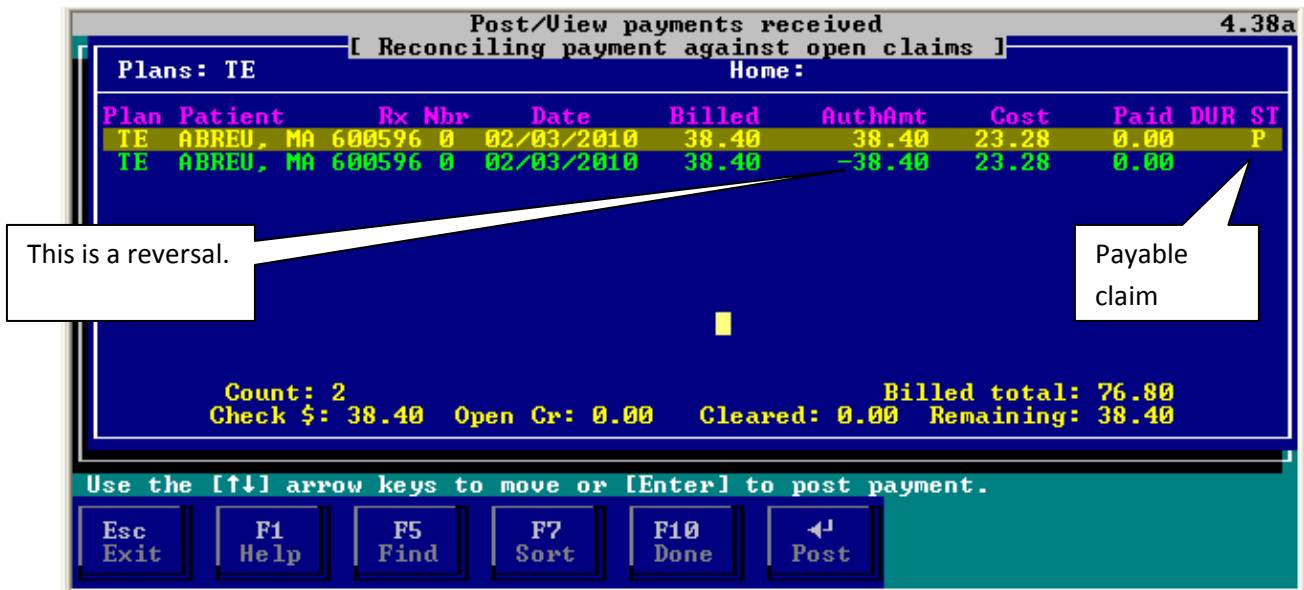
Esc Cancel  F1 Help  F5 Hist  F6 View
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We begin by entering the check information. Notice that the "Itemize claim payment" says "Yes", this was Set in the Configuration Preference screen, this tell the system that the payment will be posted to open claims (itemizing all claims paid by the check). If you elect not to itemize payments, you will not know what check paid for a given Rx claim.

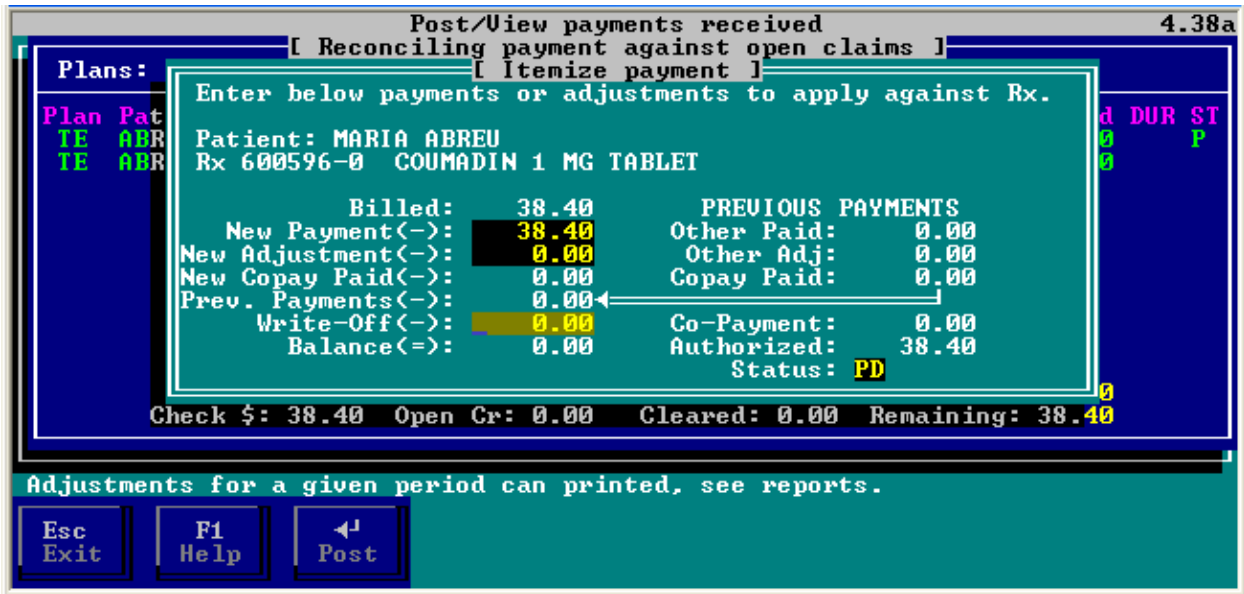


If "Itemize Claim Payment" is set to "Yes" the above screen will be displayed.

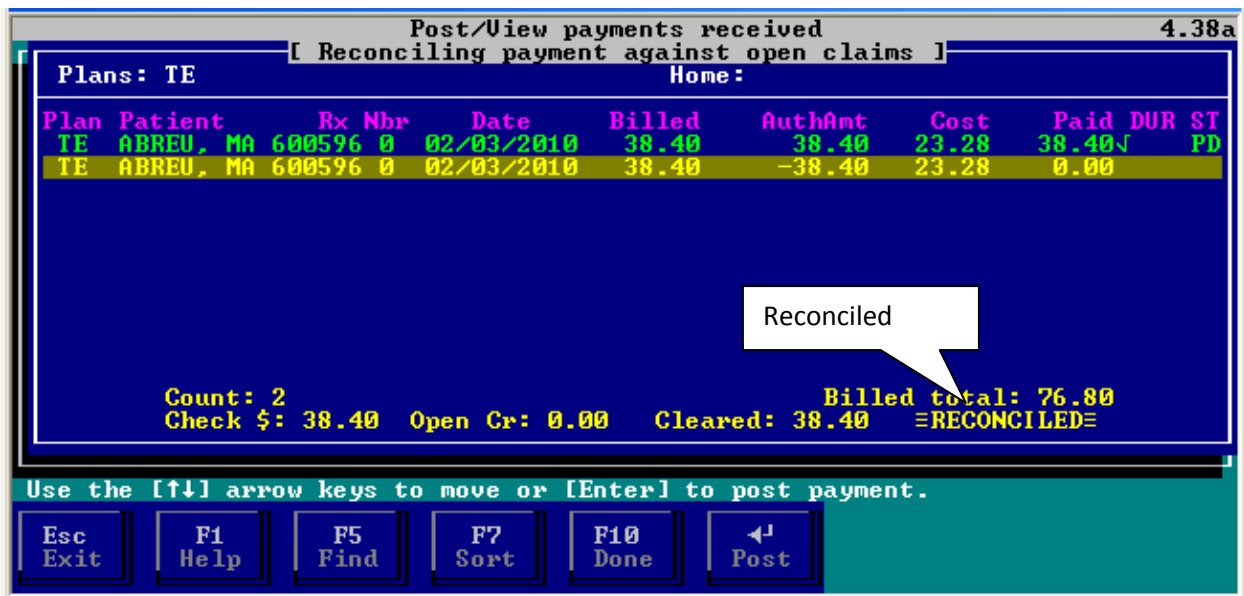
- Claims billed to Plan – here you can enter multiple insurance plans (in the case a processor pays for multiple insurance in one statement or you have the same insurance defined multiple times). You can specify up to 10 insurance plans, the system will remember all the plans entered and will display them the next time you enter a payment from the same "multiple insurance processor".
- Date Billed – in this field you can put the statement billing cycle date range.
- Automatically post payment to open claims - optionally, the system can post the entire check to all open claims until the complete check is posted by answering "Yes".



Next, you will be show all the open claims under the billing period and payment plans specified, notice that the same Rx is show twice, the claim got a Payable response and later Reversed.

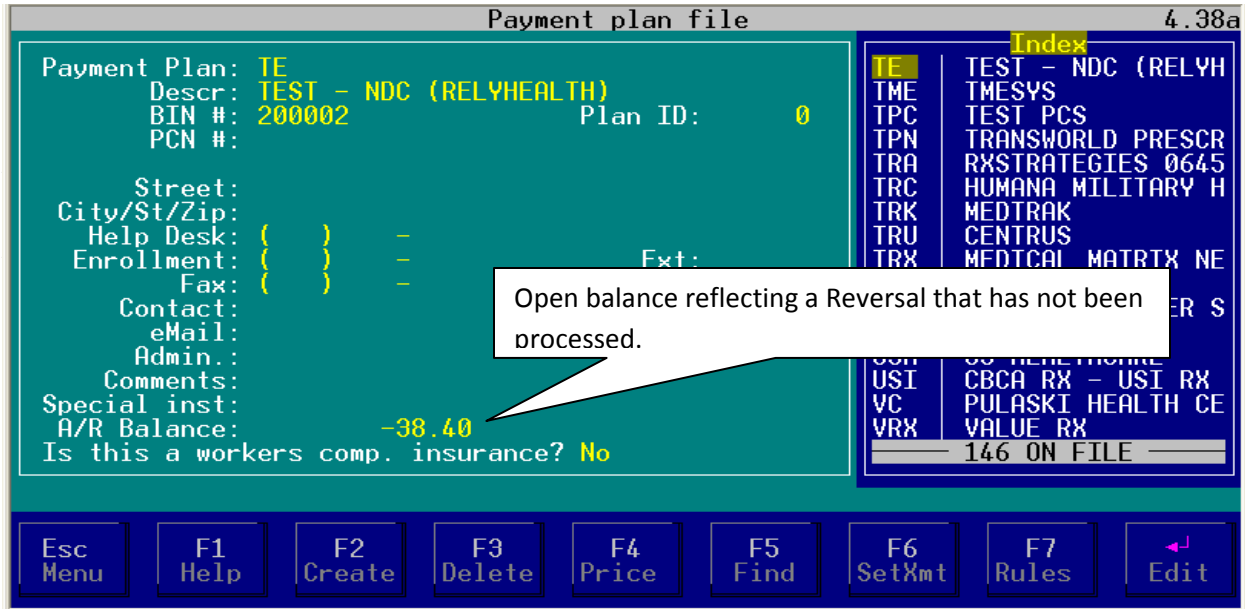


Since our check was for \$38.40 we will be posting to only one claim, the other claim will be posted when we receive the statement that includes it. If the processor charges a fee, you can set the fee in the Payment file and the fee will be automatically entered in each posting. In the case you billed more than the authorized amount, the program will automatically “write-off” the difference.



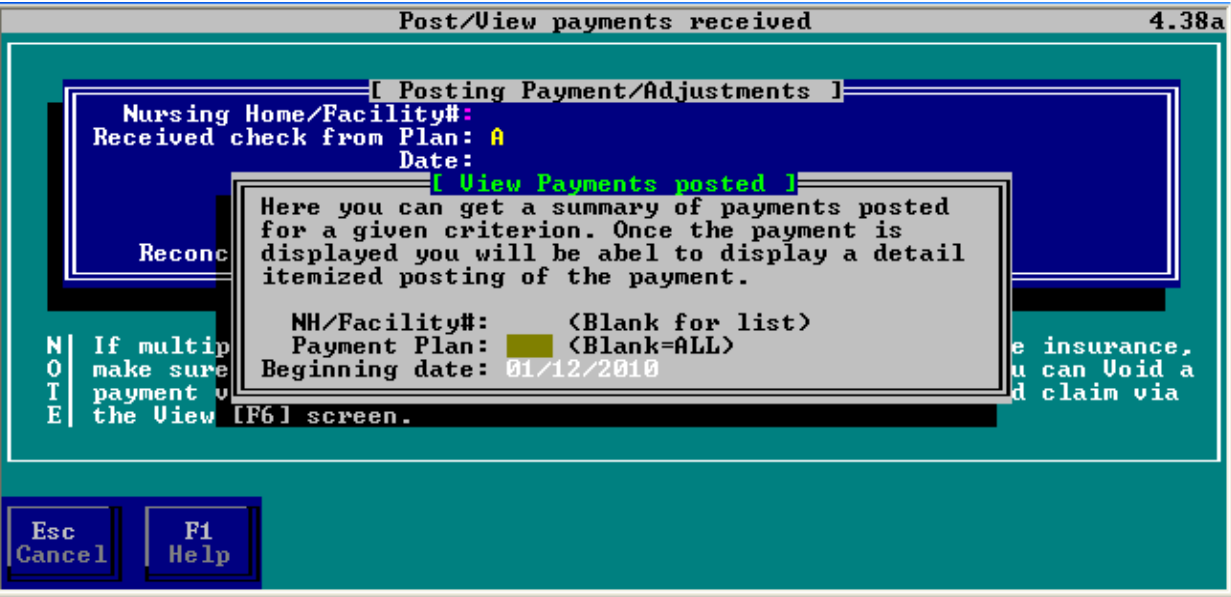
Above, you can see that our posting has “reconciled” and is now complete. We can press [F10] to save the posting or [Esc] and the posting (full or partial) will be placed on hold to allow you to complete it at a later time.

- [Find] – We can also find Rx claims we want to post to be either pressing the [F5] key and typing the Rx number or just typing the Rx number.
- Sort – We can sort all the open claims by Patient, Rx number, Date or Payment plan to accommodate and put the list in the same sequence as the insurance EOB statement.

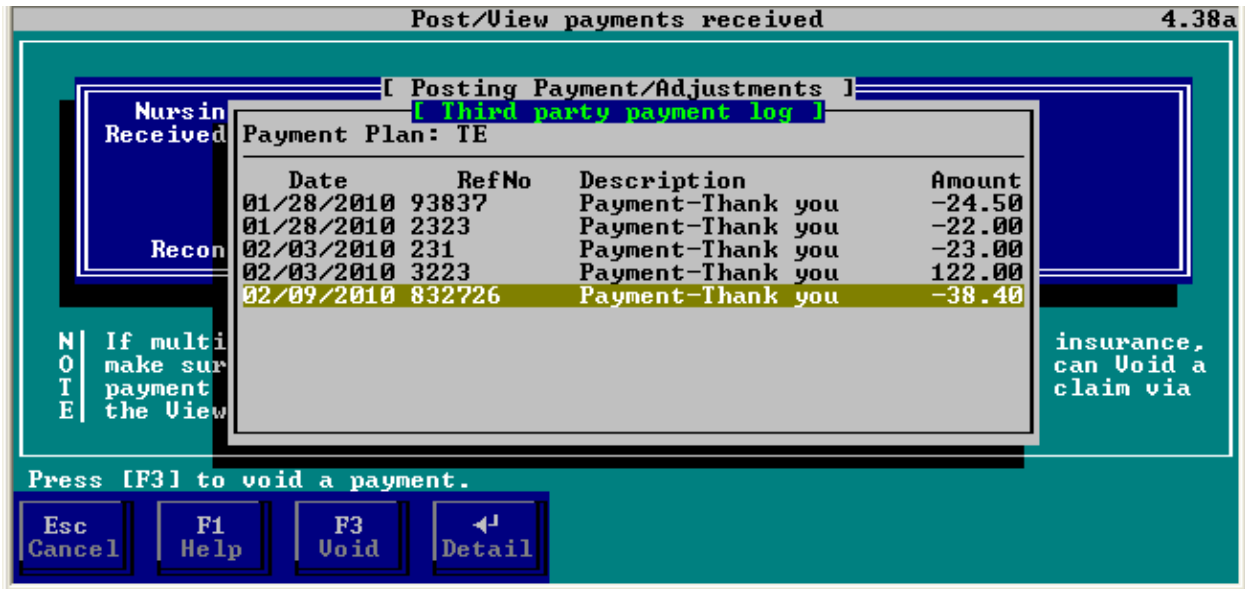


An Open balance is maintained in the Payment Plan file, has claims are submitted a Payable increases the balance Reversals and payments decrease the balance automatically.

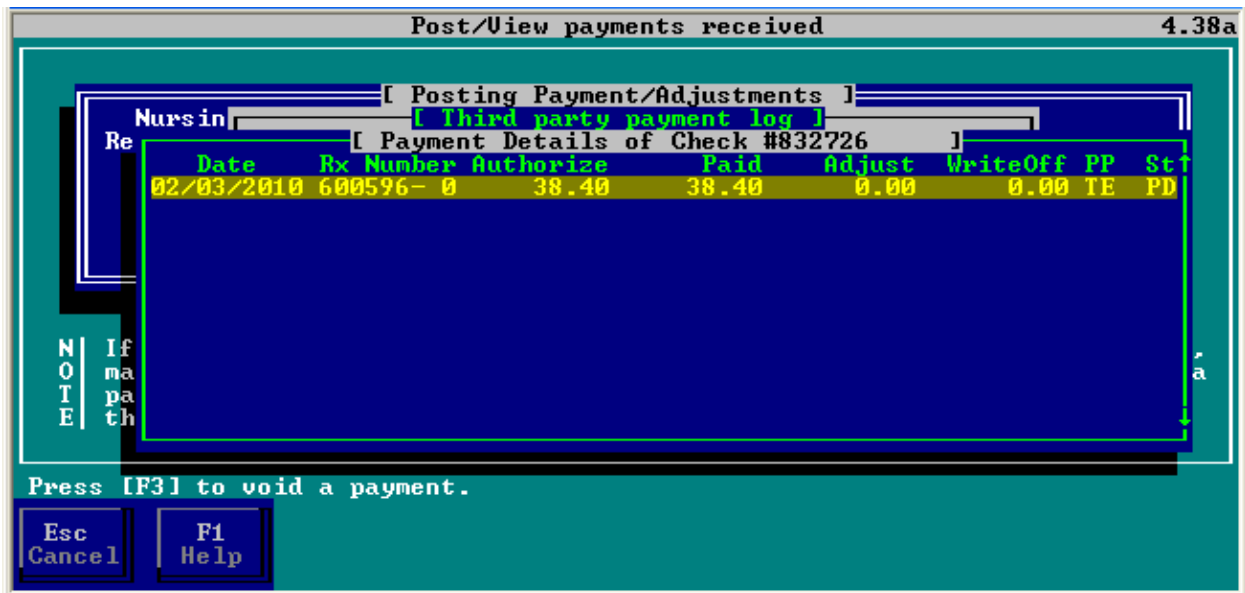
Payment History



By pressing the [F5] key, you can get a summary list of payments and then view details.

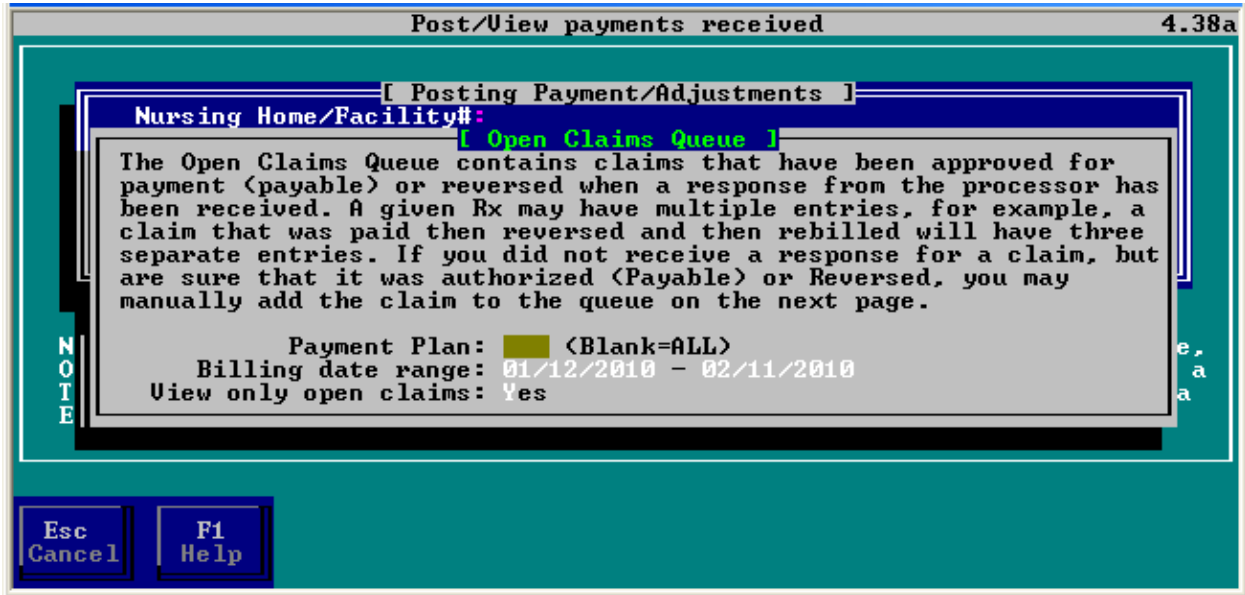


To view an itemized list of the payment, highlight the payment and press [Enter].

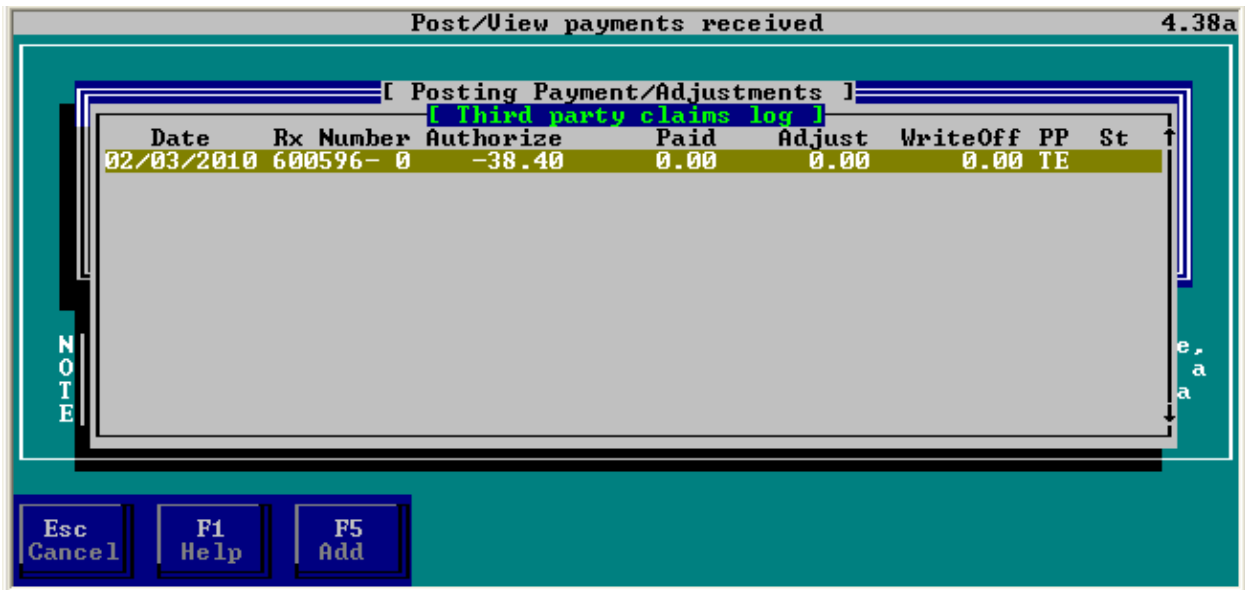


Above is an itemized list of the Rx claims paid by a posting (check #832726 for \$38.40).

View Open Claims



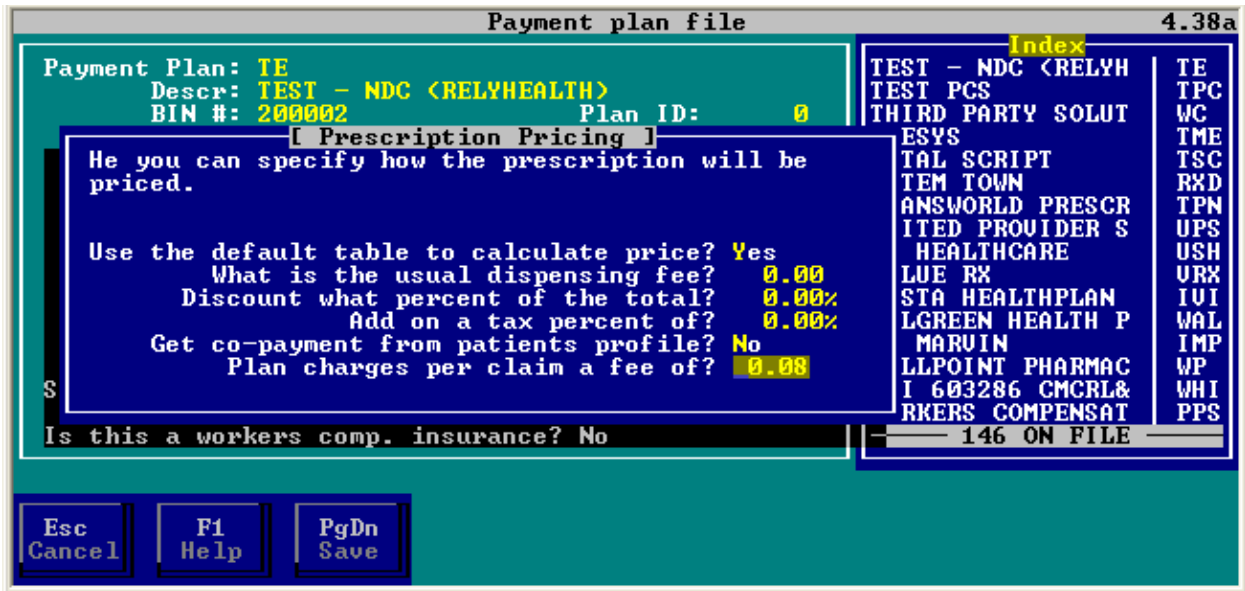
By pressing the [F6] from the Third party payment posting screen, you will see the above screen. Here you will be able to view all open claims for a given period.



Above you will find all the open claims for the specified criterion.

Note: We provided a way for you to place a Rx in the open claims log [F5], in case the Rx was not automatically added to the log due to a lost in communication when transmitting or any other unforeseen scenario. However, make sure you have thoroughly searched for the claims first.

Insurance Claim Fee

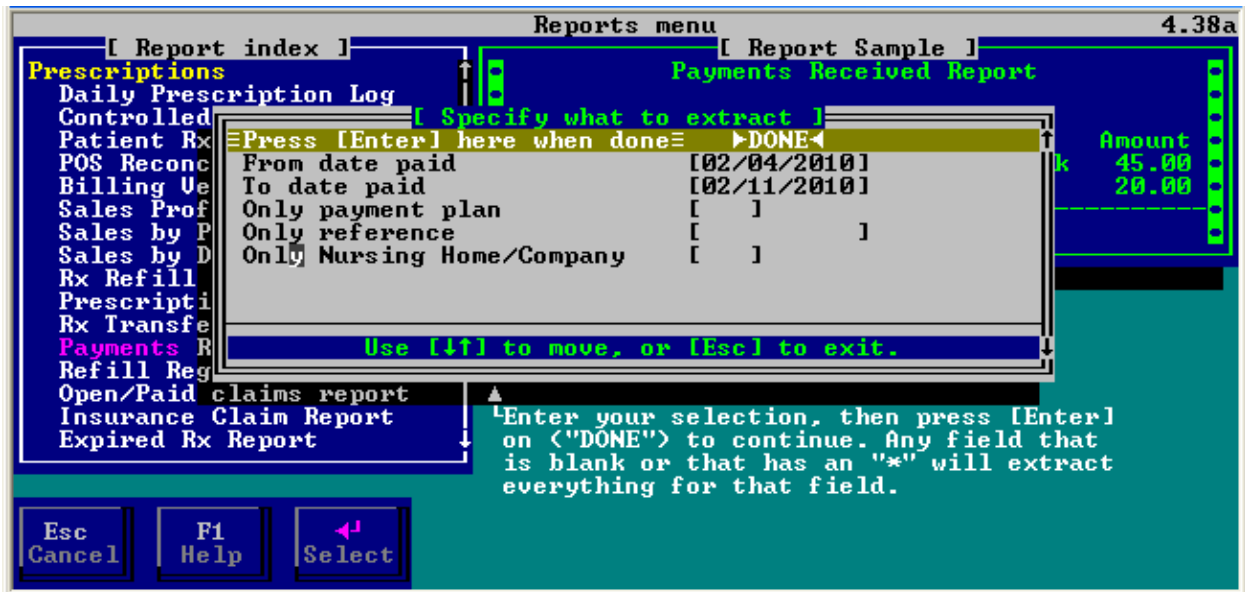


You may enter a per claim fee in the Insurance record (Payment Plan file), this fee will be automatically included in every claim when reconciling.

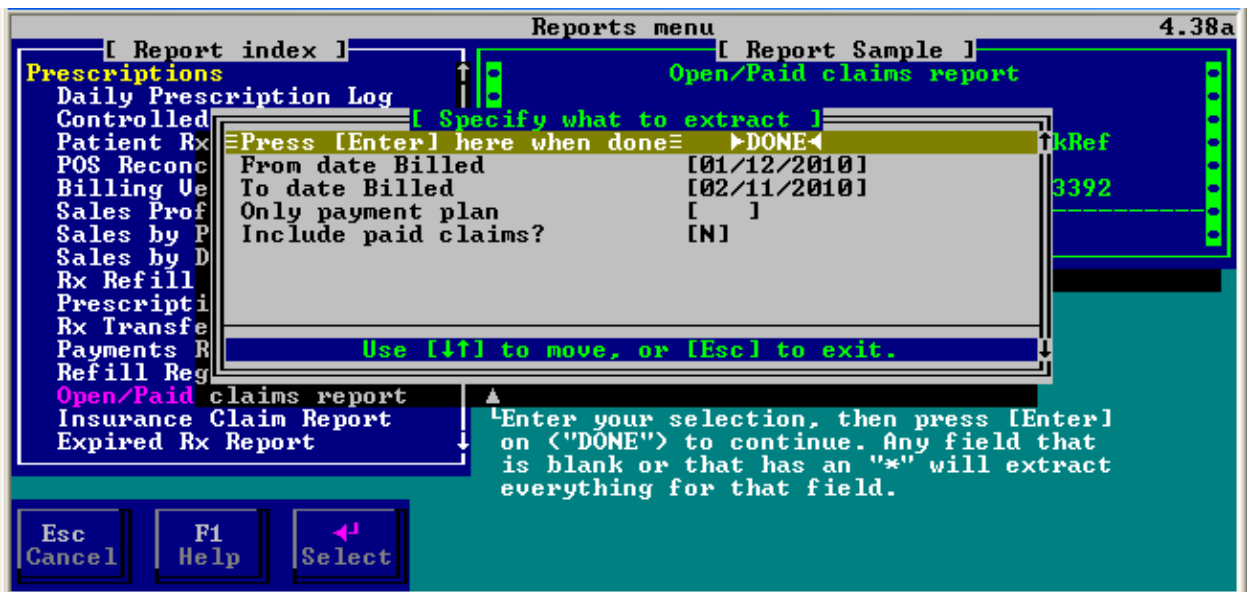
Reports

Two of the most used reports for tracking payments are the “Payments Received Report” and the “Open/Paid claims report”.





Payments Received Report – if you enter a reference number (Check number) you will get a detail list of all Rx paid with that check. Otherwise, you will get a summary of payments received within the period requested.



Open/Paid claims report - In this report you can view or print outstanding (Open) or Paid (Closed) claims.

View payments/open claims



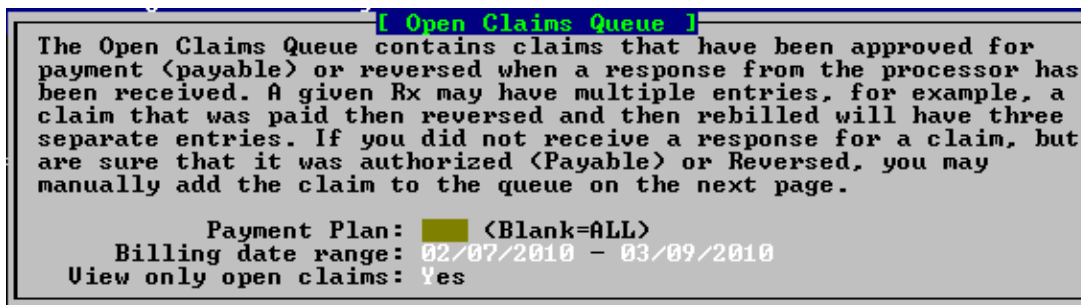
[F5] – Payment History, press this key to see payment received within a specified date range, in summary or detailed.

[Third party payment log]

Payment Plan:

Date	RefNo	Description	Amount
02/19/2010	1212	Payment-Thank you	-1.00
02/19/2010	3434	Payment-Thank you	-1.00
02/22/2010	3434	Payment-Thank you	-40.00
02/26/2010	55445	Payment-Thank you	-2.00
03/05/2010	34	Payment-Thank you	-33.00
03/05/2010	2	Payment-Thank you	-2.00
03/05/2010	23	Payment-Thank you	-23.00
03/05/2010	233	Payment-Thank you	-30.00
03/05/2010	3434	Payment-Thank you	-234.00
03/05/2010	223	Payment-Thank you	234.00

[F6] – View open claims queue, press this key to see all claims that have or have not been paid within a specified date range.



[Third party Open Claims Queue]							
Date	Rx Number	Authorize	Paid	Adjust	WriteOff	PP	St
02/12/2010	600597- 0	98.32	3.00	0.00	0.08	TE	PD
02/12/2010	600602- 0	33.77	1.60	0.00	0.08	TE	PD
03/04/2010	600611- 0	234.00	234.00	0.00	217.00	TE	PD
03/04/2010	600611- 0	-234.00	-234.00	0.00	685.00	TE	P
03/05/2010	600612- 0	198.00	0.00	0.00	0.00	TE	P

Displayed above are all the claims found in the "Open Claims Queue". From the above screen you will be able to view or add to the Queue by pressing the [F5] add button.

[Manual Open Claim Entry]

Here you can add a claim to the log file for claims that were not recorded due to lost communication or other reason. The Rx entered must have a payable status code and authorize amount and no authorization number.

Rx Number:

Post as a Void:

To add an Rx claim to the Open Claim Queue you will only need the Rx number and Refill number. If you accidentally placed a claim on the Open Claim Queue, you can set "Post as a Void" to "Yes" and it will create the same Rx claims with a negative value (similar to a reversal).

PATIENT CO-PAYMENT

To properly manage patient's co-payments make sure to set the following default to "Yes" in page 4 of the Configuration preferences on all workstations in your business:

m) Default A/R CoPay on new patient to Yes?: Yes

Every time you create a new patient the co-payment will make an A/R entry. This will force the system to treat co-payments as an Accounts Receivable item and later you will be able to post co-payment payment to open A/R co-payment. If you created a patient and the "A/R Copay" field is set to "No", all the prescriptions co-payments after that change will not show as due. If you later change the "A/R Copay" field to "Yes", the Rx co-payments previously done will not be reflected in the patients balance, you will have to manually change the balance or if you produce patient's statements it will automatically re-calculate the patients balance for all the patients in your selection criterion.