

Post Insurance Payments (pip)



The Physician's Computer Company

support@pcc.com
1 Main Street, Suite 7
Winooski, VT 05404
(800) 722-7708 Admin
(800) 722-1082 Support

Copyright © 2005, 2006, 2007 The Physician's Computer Company
2008/09/19 21:10:40

PRINTING INSTRUCTIONS: To print out copies of this document, browse to *Post Insurance Payments (pip)* (<http://learn.pcc.com/pip.pdf>) to download a PDF formatted version. Then select the "File" menu and choose the "Print" option. If you have trouble opening and printing the PDF, please contact PCC support at <support@pcc.com> or (800) 722-1082.

Table of Contents

1. Introduction.....	3
2. Quickstart: Starting pip and Posting an EOB	3
3. Find Patients and Post Payments by Claim ID#, PCC#, or Other Method.....	5
4. The Insurance Charge Selection Screen	7
4.1. Find Missing Insurance Charges	8
4.2. Function Keys on the Insurance Charges Selection Screen	9
5. Payment and Adjustment Screen	10
5.1. Working with Allowed Amounts.....	11
5.2. Payment Type, Check Number, and Responsible Party Fields	11
5.3. Function Keys on the Post Payments Screen	12
6. Conclusion	12

1. Introduction

When you receive an explanation of benefits (or remittance advice) from an insurance company, run Post Insurance Payments (**pip**) to record the information in Partner. You can also use **pip** to record non-payment and forward a balance on to a secondary carrier or the patient's guarantor account.

With **pip**, you can post insurance payment information in a matter of seconds. The instructions below include a basic payment posting procedure and a guide to **pip**'s advanced features.

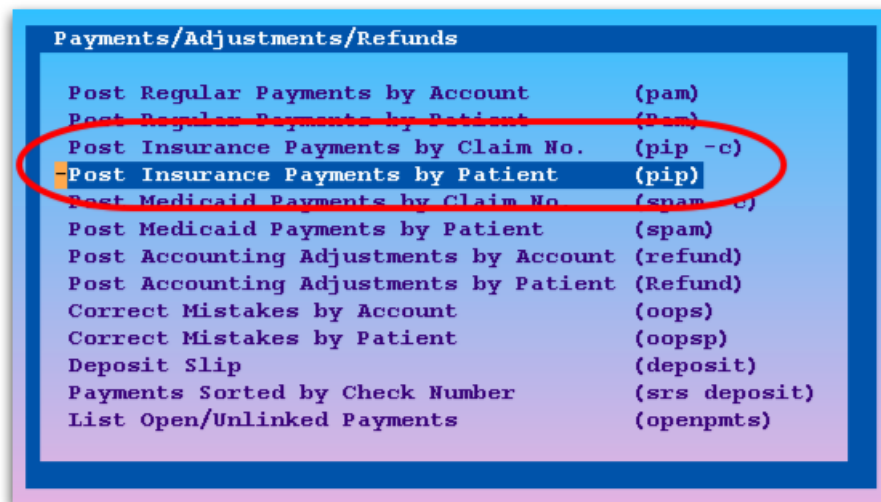
2. Quickstart: Starting pip and Posting an EOB

The procedure below will show you the insurance-payment posting basics. Follow the steps below, and then read the sections that follow to learn the extra tools and functions in the **pip** program.

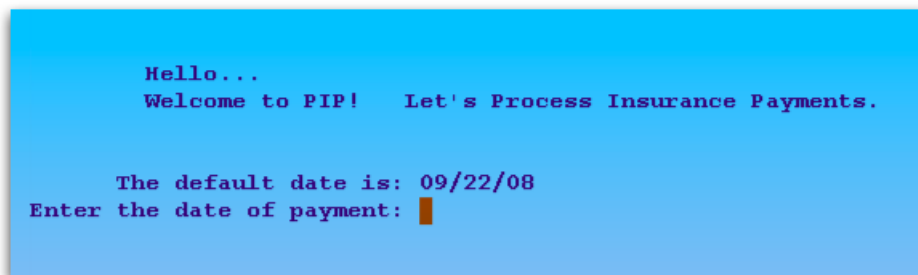
Posting Insurance Payments

1. Run **pip**

You can run **pip** from the "Payments/Refunds" window in the Billing Functions section of your Partner Windows. You can also type **pip** at a command prompt.



2. Enter the Date of Payment



Post Insurance Payments (pip)

3. Enter a Name or Claim ID#

Use Partner's find routines or enter a Claim ID# to find the patient listed on the EOB. Read the *Finding Patients or Claims* section below for other methods of finding a patient or claim in **pip**.

```
Post Insurance Payments
Please enter a patient:
First Name: B
Last Name: Flinstone
```

OR

```
Select a Claim:
Press F12 to get out of this.
Claim Number: 8840826
```

4. Select Charges Covered by the EOB

Next, you will see a list of the patient's outstanding charges that have a balance pending an insurance company. Select those charges that are listed on the EOB.

```
INSURANCE charges for BamBam Flinstone
Acct Status: Budget Pat Status:
# Date P Code Procedure Name Diagnosis Name Amount Amt Due
1 11/07/07 C 99392 Well Child 1-4 yrs Well Infant/Child $ 93.00 $ 83.00
2 C 90700 DTaP Well Infant/Child $ 45.00 $ 45.00
3 C 90713 IPV Well Infant/Child $ 50.00 $ 50.00
4 C 90707 MMR Vaccine Well Infant/Child $ 80.00 $ 80.00
5 C 90471 1 Imms Admin Well Infant/Child $ 10.00 $ 10.00
6 C 90472 2+ Imms Admins Well Infant/Child $ 30.00 $ 30.00
There are 0 more charges for this patient.
T)OS HCFA, H)CFA, P)am, I)nsurance Policy, Q)uit, or numbers to make payment on:
> 1-6
```

You may enter the numbers separated by a space or enter a range:

If you are not certain to which charges you should apply a payment, or if you need to review account information or find a charge that was mistakenly paid off, use the function keys at the bottom of the screen to access other Partner programs. Read the *Charge Selection Screen* section below for more information.

5. Enter Payments and Adjustments

On the Post Payment screen, enter a payment and/or adjustment for each of the charges you selected.

INSURANCE charges for BamBam Flinstone Date of Payment: 09/22/08
 Acct Status: Budget Pat Status:

DATE	PROCEDURE	CHARGED	ALLOWED	COPAY	PAYMENT	ADJUST	BALANCE
11/07/07	99392	\$ 83.00	\$ 82.00	\$ 10.00	\$ 82.00	\$ 1.00	\$ 0.00
	90700	\$ 45.00			\$ 35.00	\$ 10.00	\$ 0.00
	90713	\$ 50.00			\$ 38.00	\$ 12.00	\$ 0.00
	90707	\$ 80.00			\$ 58.00	\$ 22.00	\$ 0.00
	90471	\$ 10.00	\$ 15.00		\$ 10.00	\$ 0.00	\$ 0.00
	90472	\$ 30.00	\$ 24.00		\$ 24.00	\$ 6.00	\$ 0.00
TOTALS:		\$ 298.00	\$ 121.00	\$ 10.00	\$ 247.00	\$ 51.00	\$ 0.00

Payment Type: Current Insurance:
 Adjust Type: Next Insurance:
 Allow Schedule Check Number:

Save Payments View Account View Patient Config Allowed

As you enter payments and adjustments, you can use the total amounts and Allowed amounts (if available) to check your work.

6. Review Payment Types, Insurances, and Enter Check Number

The information at the bottom of the Post Payments screen allows you to edit how Partner will record the payment in the account history as well as what will happen with any remaining balance. You should carefully review these fields before saving the payment.

Payment Type: Current Insurance:
 Adjust Type: Next Insurance:
 Allow Schedule Check Number:

For more information about options and tools on this screen, read the *Payment and Adjustment Screen* section below.

7. Press [F1 -- Save Payment].

After pressing F1, you can continue to work with this patient or press F1 again to find the next patient.

3. Find Patients and Post Payments by Claim ID#, PCC#,

or Other Method

As described above, the first step to posting a payment is finding the patient or claim for which you have received an EOB. Since names can change and carriers sometimes return payment with a parent's name, Partner has lots of different ways to find the correct patient and charge entries.

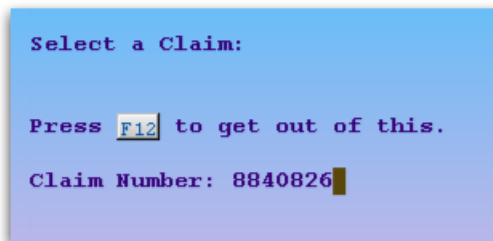
- **Search by Patient Name:** By default, **pip** asks for a patient name. You can search for a partial name and pick from a list of results.



The screenshot shows a blue window titled "Post Insurance Payments". Below the title is the text "Please enter a patient:". There are two input fields: "First Name:" with the letter "B" entered, and "Last Name:" with "Flinstone" entered.

- **Search by Claim ID#:** Every time Partner generates a claim, it creates a unique claim identifier number. This number may appear in **oops** and on various billing reports. PCC can help you configure outgoing claims so that the unique claim identifier is on every claim. Many insurance carriers will then return that number on the EOB.


To launch **pip** for a specific claim ID#, run **pip -c**. PCC Software Support can add "Post Payments By Claim ID" to your Partner Windows.



The screenshot shows a blue window titled "Select a Claim:". Below the title is the text "Press F12 to get out of this." and "Claim Number: 8840826" with a cursor at the end.

- **Search By Patient ID#:** Every patient and account in Partner has a unique account number. You can find this number in the upper right hand corner of the Family and Patient Editors (**fame** and **notjane**). PCC can help you configure your outgoing claims so this number is included with the claim. Many insurance carriers will then list that unique number on the EOB.

When you receive an EOB with the patient ID#, enter the following on the **pip** patient search screen:



The screenshot shows a blue window titled "Post Insurance Payments". Below the title is the text "Please enter a patient:". There are two input fields: "First Name:" with "PCC" entered, and "Last Name:" with "4453" entered.

- **Search by Account Name, Insurance ID#, Phone Number, Etc.:** The advanced find routines in Partner can help you find a patient by a wide range of criteria. Instead of entering a patient name, press [F4 -- *Advanced Search*]. Then select a search criteria on the "Find'em" screen. You can enter an asterisk (*) to see a list of available search criteria:

Find'em

Search by: *

Please choose the desired search criteria, and press **F1** to continue...



Insurance Certificate Number
Insurance Group Number
Magic Word
Patient CHART
Patient MEDCAID

You can learn more about **findem** by reading *Finding Patients and Accounts* (<http://learn.pcc.com/findroutines/>).

4. The Insurance Charge Selection Screen

Once you have found a patient or claim, a list of unpaid insurance charges for the patient appears on the Charge Selection screen.

INSURANCE charges for BamBam Flinstone
 Acct Status: Budget Pat Status:

#	Date	P Code	Procedure Name	Diagnosis Name	Amount	Amt Due
1	11/07/07	C 99392	Well Child 1-4 yrs	Well Infant/Child	\$ 93.00	\$ 83.00
2		C 90700	DTaP	Well Infant/Child	\$ 45.00	\$ 45.00
3		C 90713	IPV	Well Infant/Child	\$ 50.00	\$ 50.00
4		C 90707	MMR Vaccine	Well Infant/Child	\$ 80.00	\$ 80.00
5		C 90471	1 Imms Admin	Well Infant/Child	\$ 10.00	\$ 10.00
6		C 90472	2+ Imms Admins	Well Infant/Child	\$ 30.00	\$ 30.00

There are 0 more charges for this patient.
 T)OS HCFA, H)CFA, P)am, I)nsurance Policy, Q)uit, or numbers to make payment on:
 >

Next Patient Batch Claim Print Claim Print A Bill Correct Mistakes Family Editor Post A Refund

Perform Other Functions, Jump to Other Programs

The Charge Selection screen shows the date, provider, procedure code, procedure name, primary diagnosis name, amount charged, and amount due for every outstanding charge with some amount pending an insurance company.

Use the **Page Up** or **Page Down** keys if there are more outstanding charges than can fit on one screen. The oldest charges will be sorted to the top of the screen for easy selection.

Selecting Charges for Payment: When you wish to post payments and adjustments, enter item numbers for the appropriate charges. When selecting charges, you can enter more than one number. Separate item numbers by spaces or commas, or use ranges, such as "1-4". Once you've indicated the items to be paid, press **Enter** and you will see the Payment and Adjustment Screen.

4.1. Find Missing Insurance Charges

The Charge Selection screen shows only *pending* charges on the patient's *current* guarantor account. If you are missing a charge that you expected to see here, consider the following possibilities:

- **You have selected the wrong patient or claim.** Double check that the patient is not entered in your system twice, and use the function keys to verify that the charges in question were actually posted for this patient.
- **The charge is no longer pending an insurance carrier.** Press [F6 -- *Correct Mistakes*] to review or change the pending status of any charge on the account.
- **The charge is the responsibility of some other guarantor account.** Perhaps the patient was recently moved from one guarantor to another. Press [F2 -- *Other Guarantor*] to view pending charges for this patient that exist on

different accounts. Note that this key will not be available unless such charges exist.

- **The charge was already paid off.** Press [**F8** -- *Family Editor*] and then [**F3** -- *Collection Report*] or [**F8** -- *Account History*] to research account activity and outstanding charges.
- **The charge was deleted.** If none of the above explanations help you find the missing charge, it may have been deleted completely. How can you know for sure? A good first step is to review the Day Sheet (**daysheet**) report for the dates in question. For a family-specific record of activity, you can run the Daysheet History report (**dsscan**) for the guarantor account in question.

If you still have trouble finding charges or would like to learn more about the issues described above, give PCC support a call at 1-800-722-1082.

4.2. Function Keys on the Insurance Charges Selection Screen

Function keys on the Charge Selection screen will help you perform a variety of other billing-related activities.

[**F1** -- *Next Patient*]

Press **F1** to clear this patient and find a different one.

[**F2** -- *Other Guarantor*]

Press **F2** to see insurance charges for this patient which are attached to an account other than their current guarantor. This key only appears if the patient has pending charges on other guarantor accounts.

[**F3** -- *Batch Claim*] or **H**

Press **F3** and then enter item numbers to create tags for later claim generation. You can then create the claim later using the **hcfa** or **preptags** and **ECS** programs.

[**F4** -- *Print TOS Claim*] or **T**

Press **F4** and then enter item numbers to immediately print a HCFA 1500 claim form.

[**F5** -- *Print A Bill*]

Press [**F5** -- *Print A Bill*] to jump to the **bills** program for this specific account. You could use this function to generate a personal bill immediately after posting an insurance payment.

[**F6** -- *Correct Mistakes*] or **O**

Press **F6** to run the **oops** program for the patient's guarantor account. In **oops** (<http://learn.pcc.com/oops.html>), you can change the pending status of charges, unlink and relink payments, resubmit claims, correct errors, and more.

[**F7** -- *Family Editor*]

Press **F7** to run the Family Editor (**fame**) for the patient's guarantor account. In **fame**, you can update demographic information, view a collection or account history report, print form letters, and more. After dealing with a difficult billing situation, you could add an account note in **fame**.

Post Insurance Payments (pip)

[F8 -- Post A Refund]

Press **F8** to run the **refund** program. In **refund**, you can refund personal credits and post other account corrections that add a charge or offset a payment.

P

Press **P** to run the Post Regular Payments program (**pam**). In **pam**, you can record personal payments and post account corrections that reduce the account's balance or offset a charge.

I

Press **I** to open the patient's Insurance Policy screen. In **policy**, you can review the patient's plan history, add or remove policies, or make other adjustments.

5. Payment and Adjustment Screen

After finding a patient and selecting charges, **pip** displays the Payment and Adjustment screen. On this screen, you can enter payment and adjustment amounts for each charge that you selected. You can also specify how the payment or adjustment should be labeled, and you can select a responsible party for the remainder due.

Review Allowed Amount, if Available

Enter Payments and Adjustments

Change Payment Type/Note or Responsible Party

DATE	PROCEDURE	CHARGED	ALLOWED	COPAY	PAYMENT	ADJUST	BALANCE
11/07/07	99392	\$ 83.00	\$ 82.00	\$ 10.00			
	90700	\$ 45.00					
	90713	\$ 50.00					
	90707	\$ 80.00					
	90471	\$ 10.00	\$ 15.00				
	90472	\$ 30.00	\$ 24.00				
TOTALS:		\$ 298.00	\$ 121.00	\$ 10.00			

INSURANCE charges for BamBam Flinstone Date of Payment: 09/22/08
Acct Status: Budget Pat Status:

Payment Type: Ins Pmt Current Insurance: Cigna PPO \$10
Adjust Type: Ins Adj Next Insurance: Personal
Allow Schedule Cigna Check Number:

Save Payments View Account View Patient Config Allowed

The charges you selected will be listed with their date of service, procedure code, amount charged, and the contractually "allowed" amount (if known). Press **Tab** or **Enter** to move among the Payment and Adjustment fields.

Review and edit the payment type and responsible party fields at the bottom of the screen. Press [F1 -- Save Payments] to save and post payment and adjustment amounts.

Adding Insurance Payment Notes and Reasons For Denial: Practices use different Payment and Adjustment Types, which are located in the "Payment Types" table in **ted**, to add a note to the account history explaining payment or lack of payment. If an adjustment amount is \$0.00, however, you must turn on an option in **ced** for the adjustment type to be recorded in the history.

Withhold, Payment, and Adjustment Columns: The Post Insurance Payments program supports a third "Withhold" column, which would allow you to record even more information. You can activate the Withhold column by running **pip -w** instead of **pip**. Contact PCC at 1-800-722-1082 for help configuring and using different columns in **pip**.

Print a Claim When Finished: If your office always prints time-of-service HCFA forms, **pip** will ask if you need a new paper HCFA. The question will only appear if the payments or adjustments posted result in the charge pending a secondary insurance company.

5.1. Working with Allowed Amounts

The Allowed column displays the contractual reimbursement amount for the fee. The amount will only appear when the responsible insurance has an assigned allowable schedule in the Insurance Table in the Table Editor, and when that assigned schedule has a fee entered for the date of service of the charge.

The assigned allowable schedule for the responsible insurance is displayed in the lower-left corner of the screen, if available.

You can jump directly into the Contract Fee Schedule Editor (**allowedit**) for a given procedure by pressing [F8 -- Config Allow].

5.2. Payment Type, Check Number, and Responsible Party Fields

Use the fields at the bottom of the screen to modify the label and behavior for the payment:

Payment Type:	Ins Pmt	Current Insurance:	Cigna PPO \$10
Adjust Type:	Ins Adj	Next Insurance:	Personal
Allow Schedule	Cigna	Check Number:	888432

- **Payment Type:** This is the label that will be attached to the payment. Whenever you review the account's history, this is what you will see next to the payment. In most cases, the name of the insurance carrier will be appended to the Payment Type once you post it. Practices use different payment types to indicate why a payment was \$0 or to simplify reporting on different kinds of payments. Enter an asterisk (*) in the field to see payment types your office uses. The default value for this field is "Ins Pmt".
- **Adjust Type:** This is the label that will be attached to the adjustment. Whenever you review the account's history, this is what you will see next to the adjustment. In most cases, the name of the insurance carrier will be appended to the Adjustment Type once you post it. Practices use different adjustment types to indicate special adjustment circumstances. Enter an asterisk (*) in the field to see adjustment types your office uses. The default value for this field is "Ins Adj".

Post Insurance Payments (*pip*)

- **Current Insurance:** The Current Insurance field shows the current responsible party for these charges. The payments and adjustments you enter will be recorded as coming from this carrier. In almost every situation, the EOB and check you have received will match the Current Insurance field.

If you have received payment from a different carrier, double check that you have selected the correct patient, date of service, and charges. You may want to press [F2 -- *View Account*] and review the account history before continuing. You can enter an asterisk (*) in this field to see available carriers on your system and change who the payment is from.

- **Next Insurance:** If the payments and adjustments you enter do not fully pay off the charges, then the remaining amount will be pended to the next responsible party or "Next Insurance." You should always review the Next Insurance field as it determines what will happen to the remaining charge once you press [F1 -- *Save Payments*].

Partner fills the Next Insurance field in for you: if the account has a secondary insurance, it will appear in the field. If the account does not have a secondary insurance, the word "Personal" will appear. If there is no secondary insurance but the charge in question can also be covered by Medicaid, then "Medicaid" will appear. If you need to change who the next responsible party should be, you can **Tab** to this field. Enter an asterisk (*) to see a list of choices for this account.

Medicaid Status: A charge is a Medicaid charge if the patient had a Medicaid status flag assigned when the charge was posted or the charge was later marked as Medicaid in **oops**.

- **Check Number:** This number will be recorded with the payment. If you consistently enter a check number when you post payments, you will have an advantage when dealing with payment mistakes across multiple accounts. You will also be able to list all patients to whom a particular check was posted.

5.3. Function Keys on the Post Payments Screen

If you need to check account information or history, press [F2 -- *View Account*] or [F3 -- *View Patient*]. You can also view a quick demographic synopsis by pressing **Page Down**.

If you wish to edit the Allowed amount or review the allowable schedule for an amount, press [F8 -- *Config Allow*] to run the Contract Fee Schedule Editor (<http://learn.pcc.com/allowedit.html>).

6. Conclusion

The information above should help you quickly post almost every EOB you receive. Contact PCC (1-800-722-1082, <support@pcc.com>) if you are interested in adding different payment types or need help configuring your system for capitation checks, overpayments, or any other special circumstances. **pip** is a fast and powerful program that is easy for anyone to use, but be sure and let PCC know how we can make your insurance payment management even better.