Additional Payment Actions

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Apply a Discount while Posting a Payment

Payment actions are options available when/while posting payments. These actions can include applying discounts, memo lines and credit or debit adjustments.

Who can use this feature?

- Users with the Insurance Payment permission.
- Users with the Patient Payment permission set to **Apply**.
- Users with the Debit/Credit permission.

Apply Discount is used to apply discounts such as a percentage discount, a discount applied to a specific service, etc.

1. Click the **Apply Discount** button at the bottom of the screen.
2. Click the icon to select the **discount code**.
3. Enter the **Discount % and Min. Charge Amount** or **Check the Discount** charge balance to $0.00 to discount the whole balance.
4. Enter the **Received date**.
5. Type a **Memo and/or a Credit Memo.**
6. Click **Done.**

These additional actions are found in the following sections. Manually posting patient payments, Applying EOBs & ERAs, Applying insurance payment only and Applying Credits.

Apply a Credit Adjustment while Posting a Payment

Apply Credit Adjustment is used to process credit adjustments such as write-offs, professional courtesy adjustments, etc.

1. Click the **Apply Credit Adjustment** button at the bottom of the screen.

2. Fill in the option to specify this as a Patient or an Insurance **credit adjustment**.
3. Click the 🔍 icon to select the **credit code**.
4. Enter the **Credit Amount**.
5. Enter the **Received date**.
6. Type a **Memo.**
7. Click **Done**.

> If this is a credit adjustment for a charge assigned to a collection agency, a pop up will ask if the payment is from the (**collection agency name**).

These additional actions are found in the following sections. Manually posting patient payments, Applying EOBs & ERAs, Applying insurance payment only and Applying Credits.

Apply a Debit Adjustment while Posting a Payment

Apply Debit Adjustment is used to process debit adjustments such as balance transfers, no show fees, etc.

1. Click the **Apply Debit Adjustment** button at the bottom of the screen.
2. Click the 🔍 icon to select the debit code.
3. Enter the **Debit Amount**.
4. Enter the **Debit Date**.
5. Click **Done**.

These additional actions are found in the following sections. Manually posting patient payments, Applying EOBs & ERAs, Applying insurance payment only and Applying Credits.

Apply an Account Credit while Posting a Payment

Apply Account Credit is used to apply an account credit towards a specific line item. This additional action can only be used when the patient has an account credit due to them.

1. Click the **Apply Account Credit** button at the bottom of the screen.
2. Use the **Source** drop-down menu to select where the credit(s) should come from.
3. Use the **Provider** drop-down menu to select which provider the transfer should be reported for.
4. Click the icon to select the debit code.
5. Enter the **Credit Amount**.
6. Type a **Memo**.
7. Click **Done**.

These additional actions are found in the following sections. Manually posting patient payments, Applying EOBs & ERAs, Applying insurance payment only and Applying Credits.

Use Unapplied Copay while posting a payment

Did you already post a patient copay and create an account credit for this Date Of Service (DOS)? Use Unapplied Copay to easily apply the correct credit to the right procedure code

1. Click the **Use Unapplied Copay** button at the bottom of the screen.
2. Any **Unaplied Copay** with the same DOS as the procedure code will be applied.
   If the "No unapplied copay is available for this claim." appears, reference our Troubleshooting Unapplied Copays Help Article.
3. Click **Done**.

These additional actions are found in the following sections. Manually posting patient payments, Applying EOBs & ERAs and Applying insurance payment only.

Add an Info Line while Posting a Payment

Informational (Info) lines can be added to charges to provide additional information about the patient's claim. For example, if a claim was denied, you can indicate the reason for the denial here; “Denied, insurance stated this was a pre-existing condition.” Alternatively, you can choose from several pre-written info lines or create your own custom info line(s).

1. Click the **Add Info Line** button at the bottom of the screen.
2. Select an **Info Line** from the list. Or select **Custom** to enter your own info line.

    Did you know you can customize the list of info lines available within CMD? Visit our Custom Info Lines Help Article for detailed steps on how to customize your info lines.

3. Enter the **Received Date**.
4. Place a check in the box to **copy this info line to all charges on this claim**
5. Click **Done.**

These additional actions are found in the following sections. Manually posting patient payments, Applying EOBs & ERAs, Applying insurance payment only, and Applying Credits.