



Manually Apply an Insurance Payment

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Apply Payment Only allows you to apply an insurance payment to a single patient's account. To apply a full insurance payment that includes adjustment(s) and remark/reason code(s), please use the [Apply as EOB](#) option.

Selecting this option will allow you to automatically distribute the payment towards charges that have a balance set to "Due Insurance" or "Due Patient".


1. Select **Payment > Post**.
2. Fill in the option for **Insurance Payment**.
3. Click on the  icon next to **Payment By** to search for the insurance payer you received the payment from. Or click on the  icon to "Find by Claim"

 You can search Name, DOB, Account #, Member ID, Claim ID, or TCN # to "Find by Claim."

4. **Enter the check information** (e.g., Payment Amount, Received/Check Date, Deposit Date, Check/EFT Other Ref#, and Source).

 The Deposit Date field represents the date the check was deposited into the practice's/provider's account. This field will default to be the same as the check date but may be edited to reflect any delays to ACH processing.

5. Click the **Apply Payment Only** button and select **OK** to acknowledge the message displayed.
6. Select **Apply Manually** and search for the claim you wish to apply the payment towards.
7. Apply the Payment:

 Sort your search results. Visit our [Reorder Table Columns Help Article](#) for detailed steps on how to hide, rearrange or add header columns.

1. **Option A:** Locate the charge(s) you want to enter the payment for and enter the amount under the **Apply Payment** column.
 1. If you're applying the payment towards a debit, be sure to click on the **Filter Charges** button and place a check in the **Show debits** checkbox, then select the Retrieve **Charges** button.

2. **Option B:** Click on the **Apply Remaining** link to apply the payment automatically using one of the following options below:

1. **Apply charges to DUE PATIENT starting with the oldest:** This option will apply the payment to the oldest charges that are set to "*Balance Due Patient*" or "*Pending Patient*".
2. **Apply charges to DUE INSURANCE starting with the oldest** This option will apply the payment to the oldest charges that are set to "*Due Insurance*" or "*Pending Payer*".
3. **Apply to all open charges** This option will apply the payment to charges that have balances starting with the oldest charge that is set to "*Due Patient*" then the oldest charge set to "*Due Insurance*".

7. **Optional:** Apply any additional actions (e.g., apply discount, apply credit adjustment, apply debit adjustments, apply account credit, add info line).

8. Click the **Save Payment** button.

Want to learn more about the additional actions buttons on the bottom of the screen? Visit our [Additional Payment Actions Help Article](#).
