Automatically Apply an Insurance Payment

electing this option will allow you to automatically distribute the payment towards charges that have a alance 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 paymen from. Or click on the 📄 icon to "**Find by Claim**"

4. **Note**: 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** after reading the warning message displayed.

6. Select **Apply Automatically** and when the drop-down menu is displayed, select one of the following options:

> ⚡ Place a check in the "**Show a preview**" checkbox to see a preview of how your payment will be applied.

   - **Apply charges to DUE INSURANCE starting with the oldest** Selecting this option will apply the payment to the oldest charges that are set to "*Due Insurance*" or "*Pending Payer*".

   - **Apply charges to DUE PATIENT starting with the oldest** Selecting this option will apply the payment to the oldest charges that are set to "*Balance Due Patient*" or "*Pending Patient*".

   > ⚡ Sort your search results. Visit our **Reorder Table Columns Help Article** for detailed steps on how to hide, rearrange or add header columns.

7. Search for the patient you wish to apply the payment towards.

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

9. Click the **Save Payment** button.