\pply an Insurance Payment as a Credit

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- 1. Select Payment > Post.
- 2. Fill in the option for Insurance Payment.
- 3. Click the **Q** icon next to **Payment By** to search for the insurance payer you received the payment from. Or click on the **b** 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 after reading the warning message displayed.
- 6. Select Credit Account (Apply Later) and search for the patient you wish to apply the credit towards.
- 7. Review the **Account Credit Information** message displayed and make any necessary adjustments (e.g. Due To, Memo, Provider, Office).
- 8. Click Save .