




Apply 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  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** 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** .
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