Apply Insurance Payment Only

Manually Apply an Insurance Payment

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.

Automatically Apply an Insurance Payment

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**"

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.

Apply an Insurance Payment as a Credit

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** .