



*Payment Posting Guide*  
*August 2011*

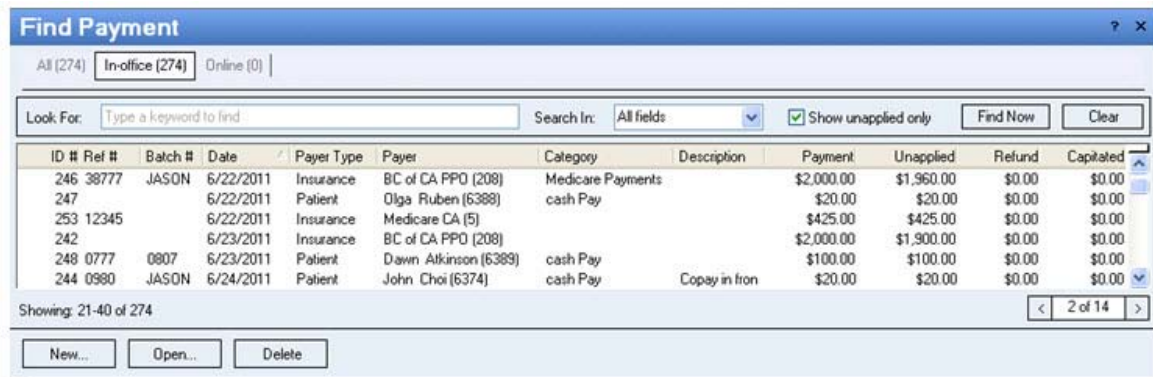
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# 1. About Posting Payments

The Payments section enables you to easily post and manage payments. In the *Find Payments* window, you can view a complete log of financial transactions associated with each charge, and view and re-open settled charges. Posting payments can be done in two ways:

- [Manual Payment Posting](#): Payments received in person or by mail from insurance companies (EOB), patients and other payers are applied manually.
- [Automatic Payment Posting](#): Payments received electronically from ERA's can be applied automatically.



The screenshot shows the 'Find Payment' window with a search filter set to 'In-office (274)'. The table below displays a list of payment transactions with columns for ID #, Ref #, Batch #, Date, Payer Type, Payer, Category, Description, Payment, Unapplied, Refund, and Capitalized.

ID #	Ref #	Batch #	Date	Payer Type	Payer	Category	Description	Payment	Unapplied	Refund	Capitalized
246	38777	JASON	6/22/2011	Insurance	BC of CA PPO (208)	Medicare Payments		\$2,000.00	\$1,960.00	\$0.00	\$0.00
247			6/22/2011	Patient	Dilga Ruben (6388)	cash Pay		\$20.00	\$20.00	\$0.00	\$0.00
253	12345		6/22/2011	Insurance	Medicare CA (5)			\$425.00	\$425.00	\$0.00	\$0.00
242			6/23/2011	Insurance	BC of CA PPO (208)			\$2,000.00	\$1,900.00	\$0.00	\$0.00
248	0777	0807	6/23/2011	Patient	Dawn Atkinson (6389)	cash Pay		\$100.00	\$100.00	\$0.00	\$0.00
244	0980	JASON	6/24/2011	Patient	John Choi (6374)	cash Pay	Copay in Iron	\$20.00	\$20.00	\$0.00	\$0.00

Showing: 21-40 of 274

Buttons: New..., Open..., Delete

## 2. Find a Payment

### ▶ To find a payment

1. Click **Encounters > Payments**.
2. Once you find the payment record, double-click the record to view it.
  - a. If you are enrolled in the Patient Billing and Portal service, you can search payments made online.
  - b. To search for a specific payment, type all or part of a word or number sequence, then click **Find Now**.
  - c. To search in a specific field, select from the drop-down list, then click **Find Now**.
  - d. Check to view unapplied payments only.

The screenshot shows the 'Find Payment' window with the following data:

ID #	Ref #	Batch #	Date	Payer Type	Payer	Category	Description	Payment	Unapplied	Refund	Capitated
246	38777	JASON	6/22/2011	Insurance	BC of CA PPO (208)	Medicare Payments		\$2,000.00	\$1,960.00	\$0.00	\$0.00
247			6/22/2011	Patient	Olga Ruben (6388)	cash Pay		\$20.00	\$20.00	\$0.00	\$0.00
253	12345		6/22/2011	Insurance	Medicare CA (5)			\$425.00	\$425.00	\$0.00	\$0.00
242			6/23/2011	Insurance	BC of CA PPO (208)			\$2,000.00	\$1,900.00	\$0.00	\$0.00
248	0777	0807	6/23/2011	Patient	Dawn Atkinson (6389)	cash Pay		\$100.00	\$100.00	\$0.00	\$0.00
244	0980	JASON	6/24/2011	Patient	John Choi (6374)	cash Pay	Copay in fron	\$20.00	\$20.00	\$0.00	\$0.00

Showing: 21-40 of 274

Buttons: New..., Open..., Delete

### 3. Edit a Payment

▶ To edit a payment

1. Click **Encounters > Payments**.
2. Once you find the payment record, double-click the record to open it. This opens the *Edit Payment* window.
3. Make the necessary changes to the payment record.
4. Click **Save** at the bottom of the window.

**Edit Payment - Aetna Southern CA (198)**

General | Apply | Documents | Tasks

Batch #:	042012cb	Summary	
Post Date:	4/30/2012	Total Amount:	\$50.00
Type:	Insurance	Payment Applied to Charges:	\$4.50
Insurance...	Aetna Southern CA	Payment Applied to Capitated:	\$0.00
Adjudication Date:	4/22/2012	Adjustments Related to Payment:	\$15.50
Reference #:		Refunds from Payment:	\$0.00
Method:	Check	Unapplied Amount:	\$45.50
Category:	None		
Amount:	\$50.00		

Apply Now...

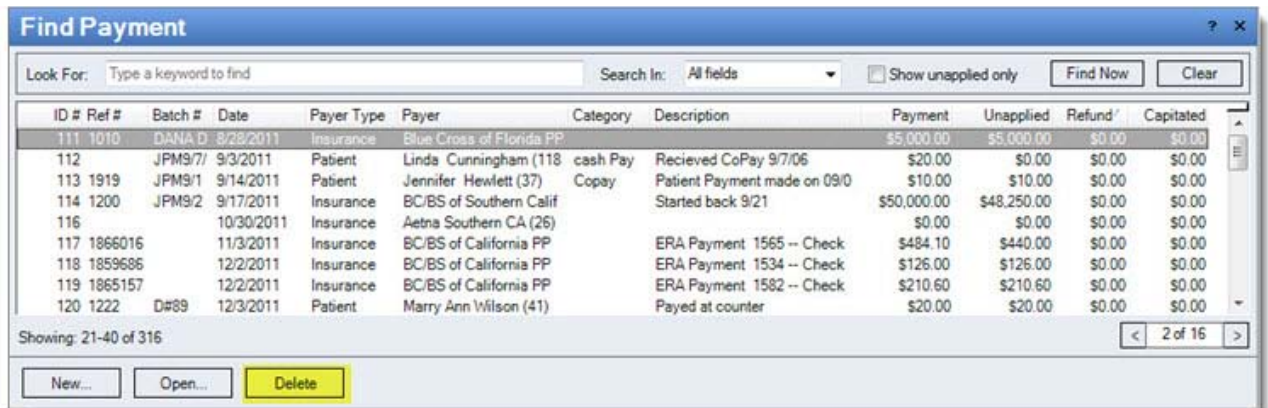
Notes

Save | Save & New | Save & Print Receipt | Cancel | Reports... | Refunds...

## 4. Delete a Payment

### ▶ To delete a payment

1. Click **Encounters > Payments**.
2. Once you find the payment record, click on the record to highlight it.
3. Click **Delete** at the bottom of the window.



The screenshot shows a software window titled "Find Payment". At the top, there is a search bar with the text "Look For: Type a keyword to find" and a "Search In: All fields" dropdown menu. To the right of the search bar are buttons for "Show unapplied only", "Find Now", and "Clear". Below the search bar is a table with the following columns: ID #, Ref #, Batch #, Date, Payer Type, Payer, Category, Description, Payment, Unapplied, Refund, and Capitalized. The table contains several rows of payment data. At the bottom of the window, there are three buttons: "New...", "Open...", and "Delete". The "Delete" button is highlighted in yellow. Below the table, it says "Showing: 21-40 of 316" and a page indicator "< 2 of 16 >".

ID #	Ref #	Batch #	Date	Payer Type	Payer	Category	Description	Payment	Unapplied	Refund	Capitalized
111	1010	DANA D	8/28/2011	Insurance	Blue Cross of Florida PP			\$5,000.00	\$5,000.00	\$0.00	\$0.00
112		JPM9/7	9/3/2011	Patient	Linda Cunningham (118	cash Pay	Recieved CoPay 9/7/06	\$20.00	\$0.00	\$0.00	\$0.00
113	1919	JPM9/1	9/14/2011	Patient	Jennifer Hewlett (37)	Copay	Patient Payment made on 09/0	\$10.00	\$10.00	\$0.00	\$0.00
114	1200	JPM9/2	9/17/2011	Insurance	BC/BS of Southern Calif		Started back 9/21	\$50,000.00	\$48,250.00	\$0.00	\$0.00
116			10/30/2011	Insurance	Aetna Southern CA (26)			\$0.00	\$0.00	\$0.00	\$0.00
117	1866016		11/3/2011	Insurance	BC/BS of California PP		ERA Payment 1565 -- Check	\$484.10	\$440.00	\$0.00	\$0.00
118	1859686		12/2/2011	Insurance	BC/BS of California PP		ERA Payment 1534 -- Check	\$126.00	\$126.00	\$0.00	\$0.00
119	1865157		12/2/2011	Insurance	BC/BS of California PP		ERA Payment 1582 -- Check	\$210.60	\$210.60	\$0.00	\$0.00
120	1222	D#89	12/3/2011	Patient	Marry Ann Wilson (41)		Payed at counter	\$20.00	\$20.00	\$0.00	\$0.00

## 5. Manual Payment Posting

Payments received in person or by mail from insurance companies (EOB's), patients and other payers are applied manually. There are essentially two steps to the process: 1) Enter information about the payment and 2) Apply the appropriate amounts of the payment to the service lines within the Kareo system.

Patient payments made with a credit card are also applied manually, however, the additional step of processing the credit card is required.

*Note: To process credit card payments by swiping a credit card, a credit card reader attached to your computer is required.*

The Kareo system captures and tracks electronic coordination of benefits information. If a secondary insurance associated with the patient and encounter is set up for electronic claim submission, a claim will automatically be placed in the queue for you to submit to the secondary insurance after you manually post a payment from an EOB.

### 5.1 Enter Copays

There are various methods of entering a copay and it depends on the process outlined by your practice. Two common examples are outlined below. Once encounters are entered, patient copays are tracked. If a patient misses his or her copay, the Kareo application can be set up to automatically bill the patient for the missed copay concurrently with the insurance billing process (see *Encounter Options* in the Kareo Help files).

#### To enter a copay as a receive payment

1. Click **Encounters > Receive Payment**.
2. Enter payment details: See below.
3. Once payment details have been entered, do one of the following:
  - Click **Save** to save the payment record and apply payments at a later time. A pop up window will ask if you want to continue without applying the payment: Click **Yes**. Note that if you choose this option, you will need to remember to apply the payment once you receive benefit information.
  - Click **Apply Now** to apply payment to the lines of service (see section, *Apply Payments from Patient or Other Payers*). Note that if you choose this option and the insurance covers the copay, you may need to reverse the payment and issue a refund once you receive benefit information.
    - a. **Batch #:** Optional. Entering a batch number is helpful for running reports. For example, if you consistently use a naming convention such as *date posted + initials of person posting* (021411CB), you can easily run reports for specific users who manage payment posting in your office.
    - b. **Post Date:** Defaults to current date. You can override with the date of your choice, for example, the date the money was deposited in the bank.
    - c. **Type:** Select *Patient* from the drop-down list.
    - d. **Patient:** Click the **Patient** button to select the patient.

- e. **Appointment:** Optional. Click the **Appointment** button to select the patient appointment associated with the payment.
- f. **Category:** Optional. These categories are specific to your practice and must be set up in the Kareo system by your administrator. See Categories.
- g. **Method:** Select the method of payment.
- h. **Reference #:** If applicable, enter the reference number of the check.
- i. **Amount:** Enter the payment amount.

**New Payment - MacIntyre, Julie**

General Apply

a Batch #: 08152011cb

b Post Date: 8/15/2011

c Type: Patient

d Patient... MacIntyre, Julie

e Appointment...

f Category: None

g Method: 1 - Check

h Reference #: 2488

i Amount: \$15.00 Apply Now...

Summary

Total Amount:	\$0.00
Payment Applied to Charges:	\$0.00
Payment Applied to Capitated:	\$0.00
Adjustments Related to Payment:	\$0.00
Refunds from Payment:	\$0.00
Unapplied Amount:	\$0.00

Notes

Save Save & New Save & Print Receipt Cancel

### ▶ To enter a copay on a new encounter

1. Click **Patients > Find Patients**.
  2. Once you find the patient, click on the name once to highlight it. Click **Create Encounter**.
  3. Enter payment details: See below.
  4. Once payment details have been entered, click **Save as Draft** or **Save for Review**.
- a. **Copay Due:** If a copay amount has been pre-set for the patient, it will display here. See section, *Patient Cases*.
  - b. **Payment Amount:** Enter the amount paid.
  - c. **Method:** Select the method of payment.
  - d. **Category:** Optional. These categories are specific to your practice and must be set up in the Kareo system by your administrator. See Categories.
  - e. **Batch #:** Optional. Entering a batch number is helpful for running reports. For example, if you consistently use a naming convention such as *date posted + initials of person posting*

(0214:11CB), you can easily run reports for specific users who manage payment posting in your office.

- f. **Reference #:** If applicable, enter the reference number of the check.
- g. **Procedures:** Enter procedure information (see section, *New Encounter*). If the "Apply Payment" column is left blank or as \$0.00 when the encounter is approved, the payment will be created but not applied. Note that if you choose to apply the copay amount to the line of service and the insurance covers the copay, you may need to reverse the payment and issue a refund once you receive benefit information.

**New Encounter - Nancy Drew (2)**

General Log |

**Patient**

Appointment... [ ] x

Patient... Nancy Drew x Primary Insurance: MC OA Preventative and Hospital Care 3000

Case... Default Case x Prior Authorization... [ ] x

**Dates**

Service Date: 8/16/2011 Post Date: 8/16/2011

to Date (optional): None Batch #: 081611cb

**Provider**

Scheduling Provider: Jeff Sherwin, D.C. Referring Provider... [ ] x

Rendering Provider: Jeff Sherwin, D.C. Location: Main Office

Supervising Provider: Jeff Sherwin, D.C. Place Of Service: 11 - Office

**Payment**

Copay Due: \$25.00 Reference #: 2458

Payment Amount: \$25.00 Memo: [ ]

Method: 1 - Check

Category: None

**Procedures**

From	To	Procedure	Mod 1	Units	Unit C...	Tot...	Diag 1	Di...	Apply Payment	Patient Resp.
8/16/2011	8/16/2011	99214 : OFF...		1.00	\$250...	\$25...	410...		\$0.00	\$25.00

Buttons: Save as Draft, Save for Review, Approve, Cancel, Check Codes...

## 5.2 Enter Payments from Patient or EOB

There are essentially two steps to the process of applying payments manually: 1) Enter information about the payment and 2) Apply the appropriate amounts of the payment to the lines of service within the Kareo system.

### To enter payment information

1. Click **Encounters > Payments**.
2. Click **New** at the bottom of the window.
3. Enter payment details: See next page.
4. Once payment details have been entered, do one of the following:
  - Click **Apply Now** to go to the *Apply* tab and apply payment to the service lines.
  - Click **Save** to save the payment record and apply payments at a later time.
  - Click **Save & New** to save the payment record and enter a new payment.

*Note: To speed data entry, clicking Save & New copies the batch number, post date and payer type to the next payment being entered.*

5. The next step is to apply the payment to lines of service: See [Apply Payments from Patients or Other Payers](#) or [Apply Payments from EOBs](#).
  - a. **General:** Click to enter information about the payment.
  - b. **Batch #:** Optional. Entering a batch number is helpful for running reports. For example, if you consistently use a naming convention such as *date posted + initials of person posting* (021411CB), you can easily run reports for specific users who manage payment posting in your office.
  - c. **Post Date:** Defaults to current date. You can override with the date of your choice, for example, the date the money was deposited in the bank.
  - d. **Type:** Select type of payment from the drop-down list.
    - If *Insurance*: Click the **Insurance** button. The *Select Insurance Plan* window opens. Select the insurance plan associated with the payment. In the Adjudication Date field, enter the adjudication date: This is the date the insurance company processed the claim(s) and should be provided on the Explanation of Benefits (EOB).
    - If *Other*: Enter the payment source and click the **Appointment** button to select the patient appointment associated with the payment.
    - If *Patient*: Click the **Patient** button to select the patient. Click the **Appointment** button to select the patient appointment associated with the payment.

- e. **Reference #:** If applicable, enter the reference number of the check.
- f. **Method:** Select the method of payment.
- g. **Category:** Optional. These categories are specific to your practice and must be set up in the Kareo system by your administrator.
- h. **Amount:** Enter the payment amount.

New Payment - Aetna PPO		Summary	
Batch #:	012011cb	Total Amount:	\$0.00
Post Date:	1/15/2011	Payment Applied to Charges:	\$0.00
Type:	Insurance	Payment Applied to Capitated:	\$0.00
Insurance...	Aetna PPO	Adjustments Related to Payment:	\$0.00
Adjudication Date:	1/4/2011	Refunds from Payment:	\$0.00
Reference #:	12440111	Unapplied Amount:	\$0.00
Method:	Check		
Category:	None		
Amount:	420.15		

### 5.3 Enter Payments from Credit Card

The Integrated Credit Card Processing service enables you to process patient payments made with a credit card over the phone or in person. To enroll in this service, please email [sales@kareo.com](mailto:sales@kareo.com).

There are essentially three steps to the process of applying credit card payments: 1) Enter information about the payment 2) Process the credit card and 3) Apply the appropriate amounts of the payment to the lines of service within the Kareo system.

You can cancel out of a transaction at any time. At the end of processing a credit card payment, you will receive an authorization number. You can print the details of the transaction or save and print a receipt.

*Note: To process credit card payments by swiping a credit card, a credit card reader attached to your computer is required.*

#### ▶ To enter and process a credit card

1. Click **Encounters > Receive Payment** in the top menu.
2. In the *New Payment* window, enter payment details. See below.
3. Once payment details have been entered, do one of the following:
  - Click **Apply Now** to go to the *Apply* tab and apply payment to the service lines.
  - Click **Save to save** the payment record and apply payments at a later time.

- Click **Save & New** to save the payment record and enter a new payment.

*Note: To speed data entry, clicking **Save & New** copies the batch number, post date and payer type to the next payment being entered.*

4. The next step is to apply the payment to lines of service: See [Apply Payments from Patient or Other Payers](#).
  - a. **General:** Click to enter information about the payment.
  - b. **Batch #:** Optional. Entering a batch number is helpful for running reports. For example, if you consistently use a naming convention such as *date posted + initials of person posting* (021411CB), you can easily run reports for specific users who manage payment posting in your office.
  - c. **Post Date:** Defaults to current date. You can override with the date of your choice, for example, the date the money was deposited in the bank.
  - d. **Type:** Select *Patient* from the drop-down list.
    - Click the **Patient** button to select the patient.
    - Click the **Appointment** button to select the patient appointment associated with the payment.
  - e. **Category:** Optional. These categories are specific to your practice and must be set up in the Kareo system by your administrator.
  - f. **Method:** Select *Credit Card* from the drop-down list. Click **Process Credit Card Payment**. The *Process Credit Card Payment* window opens to process the credit card transaction.
    - Select *Swipe Card* to process a credit card through a credit card reader attached to your computer; select *Enter information* to manually type in the credit card information. When finished, click **Process Payment**.
  - g. **Reference #:** Optional. Enter a reference for your records.
  - h. **Amount:** Amount you entered for the credit card or electronic check transaction.

## 5.4 Reverse Payment

Some situations require you to reverse a payment. For example, if a patient makes a copay at the time of service and then later finds out the insurance will cover it, you may need to reverse the payment. You can then either refund the payment to the patient or apply it later to another line of service.

### ▶ To reverse a payment

1. Click **Encounters > Find Payments**.
2. Enter all or part of a keyword to find the payment.  
If applicable, uncheck the "Show unapplied only" box to search through all records.

Show unapplied only

3. Once you find the payment, double-click the record to open it.
4. Click the *Apply* tab.
5. Check the box of the line of service that shows the payment you want to reverse (noted in the "This Payment" column).

?	Svc Date	Description	Mod	Charges	Balance	Pat Resp	This Payment
<input checked="" type="checkbox"/>	5/11/2011	00142 - ANESTHESIA, PROC ON		\$200.00	\$180.00	\$0.00	\$20.00

6. Click **More +** on the lower right of the window.
7. Post a reverse payment:
  - a. Select *Payment* from the drop-down list. Enter the amount you want to reverse using the minus (-) sign. Click **Post**.
  - b. The payment will now show as reversed and remains unapplied until you refund it or apply it to a future line of service. See section, *Issue Refunds*.

c.

Transaction	Amount	Pat Resp	Tot Balance
Description			
01/31/13 Transfer	\$20.00	\$20.00	\$200.00
Transferred \$20.00 to patient responsibility.			
01/31/13 Payment	\$20.00	\$0.00	\$180.00
Applied \$20.00 from patient payment #203.			
01/31/13 Payment	(\$20.00)	\$20.00	\$200.00
Applied (\$20.00) from patient payment #203.			

a.

8. Once the reverse payment has been posted, click **Save**.

## 5.5 Apply Payments from EOBs

After a payment has been entered (see [Enter Payments from Patient or EOB](#)), the appropriate amounts of the payment are applied to the service lines within the Kareo system.

### To apply payments

1. After payment information has been entered on the *General tab* click **Apply Now**.
2. On the *Apply* tab, select a service line and enter payment amount: See next page.
3. Once payments have been applied, do one of the following:
  - Click **Next Line** to move to the next service line.
  - Click **Add Encounter** to select another encounter.
  - Click **Save & New** to save the payment record and enter a new payment.
  - Click **Save** to save the payment record.

You can use your Tab key to navigate to each field.

- a. Claim ID (encounter number).
- b. Lines of service associated with an encounter.
- c. List of transactions as payment is being applied.
- d. **Add Encounter:** Allows you to pull up the service lines you want to work with. In the blank field enter the full or partial encounter number printed on the EOB.
- e. **Payer:** The Payer field is auto-populated with what you entered under the *General* tab.
- f. **Allowed:** Enter the allowed amount as reported on the EOB. If a claim has been denied, leave the allowed field at \$0.00.
- g. **Contract Adj:** Auto-calculated after you entered the Allowed amount. Optional: Select an adjustment code from the drop-down list on the right. These codes are set up in the Kareo system by your administrator.
- h. **Second Adj:** If applicable, enter a second adjustment reported on the EOB. Optional: Select an adjustment code from the drop-down list on the right. These codes are set up in the Kareo system by your administrator.
- i. **Paid:** Enter the portion of the payment that is to be applied to this claim.
- j. **Deductible:** If applicable, enter the deductible amount reported on the EOB.
- k. **Coinsurance:** If applicable, enter the coinsurance amount reported on the EOB.
- l. **Copay:** If applicable, enter the copay amount reported on the EOB.

- m. **Status:** How any remaining balance will be handled after the payment and adjustments have been applied. You can override Default by selecting an action from the drop-down list. Optional: Select a Status reason code from the drop-down list on the right.
- n. **Note:** Optional: Enter any free form notes as necessary.



## Tips

- When entering a payment from an EOB, enter the information exactly as it appears on the EOB. This information will be packaged and sent electronically to any secondary payers. If you want to add internal adjustments or other actions not to be included in the information sent to secondary payers, click **More+** in the bottom right corner of the window; select actions from the drop-down list, enter an amount and click **Post**.
- To manually search for a patient or encounter: Select either **Add Encounter** or **Add Patient**. In the blank field to the right, press **Enter** on your keyboard. This opens the *Find* window. Once you find the patient or encounter, double-click the line item to add it to the New Payment record.

## 5.6 Apply Payments from Patients or Other Payers

After a payment has been entered (see [Enter Payments from Patient or EOB](#)), the appropriate amounts of the payment are applied to the service lines within the Kareo system.

### To apply payments

1. After payment information has been entered on the *General tab* click **Apply Now**.
2. On the *Apply* tab, select a service line and enter payment amount: See next page.
3. Once payment has been applied, do one of the following:
  - Click **Next Line** to move to the next service line.
  - Click **Add Patient** to select another patient.
  - Click **Save & New** to save the payment record and enter a new payment.
  - Click **Save** to save the payment record.

You can use your Tab key to navigate to each field.

- a. Lines of service associated with the patient.
- b. List of transactions as payment is being applied.
- c. Patient name and ID.
- d. **Paid:** Enter the amount you want to apply to the service line.
- e. **Status:** How any remaining balance will be handled after the payment has been applied. You can override Default by selecting an action from the drop-down list. Optional: Select a Status reason code from the drop-down list on the right.
- f. **Note:** Optional: Enter any free form notes as necessary.

**New Payment - Abby, Anne**

General **Apply**

Add Patient:  Show Only: Selected Amount: \$55.00 Unapplied: \$0.00

ID	Patient	?	Svc Date	Description	Mod	Charges	Balance	Pat Resp	This Payment
8518	Abby, Anne	<input checked="" type="checkbox"/>	12/6/2010	92014 - OPHTHALMOLOGIC		\$75.00	\$5.00	(\$55.00)	\$55.00
		<input type="checkbox"/>	12/6/2010	92012 - OPHTHALMOLOGIC		\$50.00	\$50.00	\$0.00	\$0.00
		<input type="checkbox"/>	12/7/2010	92014 - OPHTHALMOLOGIC		\$75.00	\$75.00	\$0.00	\$0.00

Patient **More Details**

Copay Due: 15.00

Paid: 55.00

Status: None 1 - Charge applied to deductible amount

Note:

Transaction	Amount	Pat Resp	Tot Balance
12/20/10 Billed	\$0.00	\$0.00	\$60.00
Submitted electronic claim to primary insurance: Aetna.			
12/20/10 Claim Processed	\$0.00	\$0.00	\$60.00
Received message: Error: (E_V) SendBusComponents.ClaimFormatValidator			
01/04/11 Re-Billed	\$0.00	\$0.00	\$60.00
Ready to bill primary insurance: Aetna.			
01/04/11 Billed	\$0.00	\$0.00	\$60.00
Submitted electronic claim to primary insurance: Aetna.			
01/07/11 Payment	\$55.00	(\$55.00)	\$5.00
Applied \$55.00 from patient.			

Next Line Add Encounter Add Patient More +

Save Save & New Save & Print Receipt Cancel

## 6. Automatic Payment Posting

### 6.1 Apply Payments from an ERA

Payments received electronically from ERA's can be applied automatically. The automatic posting supports denials, reversals, underpayments, over-payments, and other complex electronic remittance scenarios.

The Kareo system captures and tracks electronic coordination of benefits information. If a secondary insurance associated with the patient and encounter is set up for electronic claim submission, a claim will automatically be placed in the queue for you to submit to the secondary insurance after you manually post a payment from an EOB. See Setting up Insurance Companies.

#### To apply payments

1. Click **Encounters > Clearinghouse Reports**.
2. Click the *Electronic Remittance* tab.
3. Double-click a report.
4. Review the ERA report.
5. Click **Post Payment** on the bottom of the window. This displays the *New Payment* window. On the *Apply* tab, payments and adjustments are automatically populated in the corresponding fields.

*Note: The Errors tab at the top of the window will appear if the ERA being processed includes claim denials due to errors. If there are denials within the ERA report, the system will automatically display the "Errors" section of the payment record; allowing the biller to review the denied claims and take any necessary actions.*

5. Make any necessary changes. See Tips.
6. Optional: Click the *General* tab to enter a batch number. Batch numbers are helpful for running reports. For example, if you consistently use a naming convention such as *date posted + initials of person posting* (021411CB), you can easily run reports for specific users who manage payment posting in your office.
7. Once you finish reviewing the report click **Save**.

*Note: Once you open an ERA report, click **Post Payment**, and save the new payment, Kareo will automatically mark your ERA report as "Reviewed."*



#### Tips

- When applying payments from an ERA, leave the payment and adjustment information exactly as it appears on the ERA. This information will be packaged and sent electronically to any secondary payers. If you want to add internal adjustments or other actions not to be included in the information sent to secondary payers, click **More+** in the bottom right corner of the window; select actions from the drop-down list, enter an amount and click **Post**.