

Applying Contractual Adjustment



GO TO

BILLING>CLAIMS>VIEW CLAIMS>POST PAYMENT

STEPS

1. Enter the allowed amount in the allowable field as seen in the EOB

Available Funds	Allowable	Payment Amount	Adjustment Type	Adj Amount	Adjustment Type	Adj Amount	Adjustment Type	Adj Amount
10/11 \$5.00 Ck #: NH1Ja	\$ 200.00	\$	Co-Pay	\$ 0.00	Co-Insuran	\$ 0.00	Contractual	\$ 0.00

2. A line item will then be populated showing this adjustment

REASON	PROCEDURE	DATE OF SERVICE	AMOUNT CHARGED	ALLOWABLE	AMOUNT ADJUSTED	AMOUNT PAID	AMOUNT OWED	OWED BY
Procedure	99214	01/16/19	\$300.00	\$200.00	\$-100.00	\$100.00	\$100.00	AETNA

3. To Zero out the balance for amount owed by insurance, adjust the amount as contractual

REASON	PROCEDURE	DATE OF SERVICE	AMOUNT CHARGED	ALLOWABLE	AMOUNT ADJUSTED	AMOUNT PAID	AMOUNT OWED	OWED BY
Procedure	99214	01/16/19	\$300.00	\$200.00	\$-200.00	\$100.00	\$0.00	AETNA

Available Funds	Allowable	Payment Amount	Adjustment Type	Adj Amount	Adjustment Type	Adj Amount	Adjustment Type	Adj Amount
10/11 \$5.00 Ck #: NH1Ja	\$ 0.00	\$	Co-Pay	\$ 0.00	Co-Insuran	\$ 0.00	Contractual	\$ 100.00

4. User Correction – to correct any mistake in posting. This can be used to add or deduct funds to adjust the balance

- a. Example: adding \$50 adjusts the balance under Amount Owed

AMOUNT CHARGED	ALLOWABLE	AMOUNT ADJUSTED	AMOUNT PAID	AMOUNT OWED	OWED BY
\$100.00		\$0.00	\$0.00	\$100.00	TEST, MYRNA

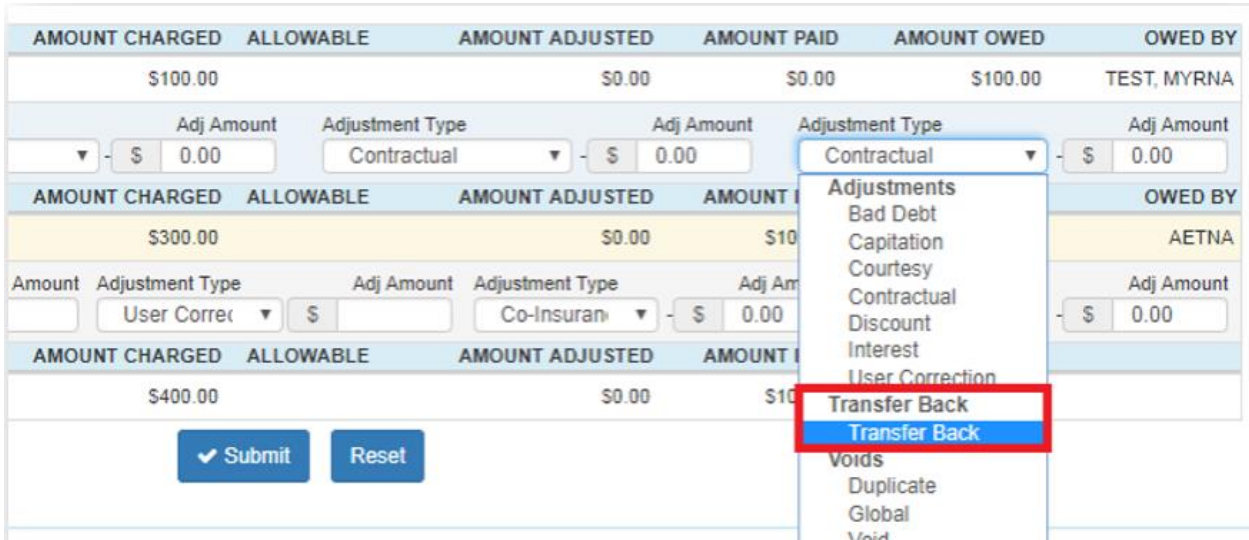
Adj Amount	Adjustment Type	Adj Amount	Adjustment Type	Adj Amount
\$ 0.00	Contractual	\$ 0.00	Contractual	\$ 0.00

AMOUNT CHARGED	ALLOWABLE	AMOUNT ADJUSTED	AMOUNT PAID	AMOUNT OWED	OWED BY
\$300.00		\$50.00	\$100.00	\$250.00	AETNA

Adjustment Type	Adj Amount	Adjustment Type	Adj Amount	Adjustment Type	Adj Amount
User Correc	\$ 50.00	Co-Insuran	\$ 0.00	Contractual	\$ 0.00

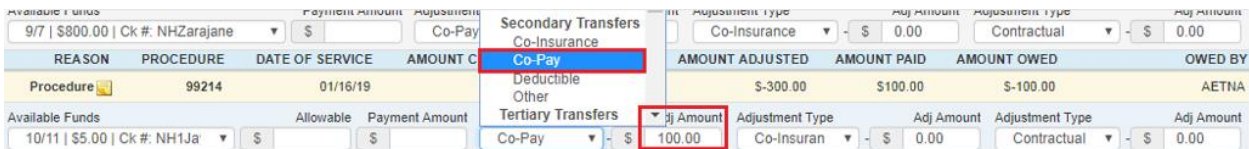
AMOUNT CHARGED	ALLOWABLE	AMOUNT ADJUSTED	AMOUNT PAID	AMOUNT OWED
\$400.00		\$0.00	\$100.00	\$300.00

5. Transfer Back – appears every time a balance is moved from one entity to another. This option is used to return a balance back to where it came from



The screenshot shows a form with multiple rows for adjustments. The first row has an amount charged of \$100.00, an allowable of \$0.00, and an amount owed of \$100.00 to TEST, MYRNA. The second row has an amount charged of \$300.00, an allowable of \$0.00, and an amount owed of \$100.00 to AETNA. The third row has an amount charged of \$400.00, an allowable of \$0.00, and an amount owed of \$100.00. A dropdown menu is open, showing various adjustment types, with 'Transfer Back' highlighted in red.

6. Secondary Transfers – to move a balance from the primary to the secondary insurance
 - a. Example - \$100 is patient's copayment, since patient has a secondary insurance, this will then be transferred to that insurance and not the patient by choosing Secondary Transfers



The screenshot shows a form with a dropdown menu open for 'Secondary Transfers'. The menu options are 'Co-Insurance', 'Co-Pay', 'Deductible', and 'Other'. The 'Co-Pay' option is highlighted in red. The form also shows a table with columns for REASON, PROCEDURE, DATE OF SERVICE, AMOUNT CHARGED, ALLOWABLE, AMOUNT ADJUSTED, AMOUNT PAID, AMOUNT OWED, and OWED BY. The table has one row with a co-payment of \$100.00 to UNITED HEALTHCARE.

- b. A new line item will be populated in the post payment screen showing this adjustment

REASON	PROCEDURE	DATE OF SERVICE	AMOUNT CHARGED	ALLOWABLE	AMOUNT ADJUSTED	AMOUNT PAID	AMOUNT OWED	OWED BY
Co-Payment	99214	01/15/19	\$100.00		\$0.00	\$0.00	\$100.00	UNITED HEALTHCARE


7. Claim History – shows the history of adjustments and details of the check entered into the system for the payment

Claim History							
Adjustments							
	Line Item	Amount	Type	Authorized By	Authorized On		
	90834	\$-100.00	Transfer Patient: Co-Pay	Myrna A	01/16/2019		
	90834	\$-100.00	Transfer Secondary: Co-Insurance	Myrna A	01/16/2019		
Payments							
	Edit Payment	Line Item	Check/CC Number	Paid By	Amount	Authorized By	Authorized On
	Edit Payment	90834	Newyear2019	AETNA	\$100.00	Myrna A	01/16/2019

8. Selecting the Edit Payment link pulls up the Payment Editing Tool

Payment Editing Tool HELP

Post Payment (Claim #11517945) > Edit Payment

GO TO PARENT	RECEIVED FROM	RECEIVED ON	PAYMENT AMOUNT	UNAPPLIED AMOUNT	PAYMENT TYPE	CHECK NUMBER	RECEIVED BY	ADJUSTMENT AMOUNT	VOID
View Parent Adjustments	AETNA	1/16/2019 	\$100.00	\$0.00	CHECK Comment	TestCheck01	MYRNA A	<input type="text"/>	Submit Void
		Update							

GO TO ALLOCATION	RECEIVED FROM	ALLOCATED ON	ALLOCATED TO	PAYMENT AMOUNT	ALLOCATED BY	ADJUSTMENT AMOUNT	VOID
View Allocation Adjustments	AETNA	1/16/2019	Claim #: 11517945 99214	\$100.00	MYRNA A	<input type="text"/>	Submit Void

9. If you need to adjust a payment, simply indicate the value to add or deduct to the payment amount in the Adjustment Amount field

- Example: the payment for 99214 should only be \$75, but it was incorrectly entered at \$100. Enter the amount to deduct in the Adjustment field and hit Submit

GO TO ALLOCATION	RECEIVED FROM	ALLOCATED ON	ALLOCATED TO	PAYMENT AMOUNT	ALLOCATED BY	ADJUSTMENT AMOUNT	VOID
View Allocation Adjustments	AETNA	1/16/2019	Claim #: 11517945 99214	\$100.00	MYRNA A	<input type="text" value="-25"/>	Submit Void

NOTES

- Types of Patient Transfers:
 - Balance Bill – used to bill the entire balance to the patient
 - Coinsurance
 - Copay
 - Deductible
 - Other (to bill a portion of the balance to the patient that doesn't fall under balance bill, coinsurance, copay, or deductible)
- Types of Voids: (will void the entire line item)
 - Duplicate
 - Global
 - Void (deleted a claim created in error)