

× Cancel

RevolutionEHR introduces the ability to automatically allocate payments based on ERA data

Admin Configuration

- In Admin > General > Practice Preferences > Additional Preferences > Accounting set Allow ERA Auto-Posting @ Yes No
- Go to Admin > RevolutionEHR Solutions > RevClear to set who will receive ERA Auto-Posting Task Assignments.

levClear		If your location has different RevClear credentials than your practice, add additional credentials by location						
ERA Auto-Posting Pa	ayment Location Consolidation	Additional RevClear Credentials						
Default Payment Select Location		This should only be used if your Location has RevClear credentials whi	ch are not the same as your Practice level Re	evClear credentials				
ERA Auto-Posting Task Assignment		Status All Active Inactive						
Practice Site ID trizetto_rc		Site ID Password Location(s) Auto-Posting Status 7						
Select Employee(s)	Any Group	trizetto_rc1 Rev0lut!on Hawaii, East Coast, Central	No	Active	×			
	Select All	Set the default payment location	New Credentials					
	Dumbledore, Albus		Site ID*	ERA Auto-Posting Task	Assignment			
	Potter, Harry		Password*	Select Employee(s) A	ny Group			
	Renner, Harlee		Location(s) Select Location(s)		Select All			
	Benner, Krista	Check the box to enable auto-posting at a location	Auto-Posting		Dumbledore, Albus			
					Potter, Harry			
	RevAspire, RevAspire				Renner, Harlee			
	Shamsai, Behi				Renner, Krista			
	SME. EMB				RevAspire, RevAspire			
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create the	e Practice Master Lis [.]	t of Adjustment Code Associations			Snape, Severus			

To create the Practice Master List of Adjustment Code Associations, go to Admin > Data Configuration > Auto-Posting Adjustment Code Associations to configure 'Transfer Type' and 'Reason' associated with an Adjustment Code.

min				Click to a	dd a new adjustment code
eneral	Auto-Posting Adjustn	ment Code Associations		_	
terprise Admin	Status All Activo	Inactivo	Common Adjustment Codes are displayed and ready for configura	tion	
nployee/Roles	Status All Active				-
ata Configuration	Adjustment Code	Description		Click the row to configure	Reason Status V
Accounting	144	Incentive adjustment, e.g. preferred produ-	t/service.	Write-off	Active
Auto-Posting Adjustment	18	Exact duplicate claim/service (Use only with	h Group Code OA except where state workers' compensation regulations requires CO)	Patient Transfer	Active
Code Associations	197	Precertification/authorization/notification/pr	e-treatment absent.	Patient Transfer	Active
Reasons	204	This service/equipment/drug is not covered	under the patient's current benefit plan.	Patient Transfer	Active
Balance Writeoff	226	Information requested from the Billing/Ren	dering Provider was not provided or not provided timely or was insufficient/incomplete. At least one Remark (Code must be provided. Write-off	Active
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Go to Admin > Vendors/Partners > Insurance Companies to configure any adjustment codes to be used instead of the practice's master list.





Payment Received from the Clearinghouse

A 'Pending Payment' will be created when a payment is received from a clearinghouse.

• In the Accounting module under Payments, search for pending payments.

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NOTES:

If the Explanation of Benefits (EOB) contains copays and deductibles, they will appear. If they have already been collected, click the minus button to eliminate the transfer reason before applying the payment.

Having multiple insurance listings with identical Payer IDs can lead to multiple pending payments. Additionally, when invoices are listed in different locations but paid by the same Payer ID, it will also generate multiple pending payments.



Resolving Task Generated Errors

• Task generated errors can be found in the 'Tasks' module.

Error Scenario	Task Generated	How to Resolve
The primary invoice is for Insurance A, the secondary payment is from Insurance B. The Insurance B ERA is being processed by Auto-Posting. The system will identify all non-primary payments on the ERA. All of these payments will be listed in a Task. The user will need to review the task data, ERA data, and manually add those invoices to the correct payment group.	The Task should contain all identified secondary claims on a single ERA. The message should be: "Cannot create payment for Primary Claim ID: (#) Received payment for an amount that is not from the primary payer, i.e., secondary or tertiary payer. Please review ERA and manually allocate payment." In the ERA file, when the claim is processed as secondary, tertiary, the system should create a task.	 Locate the primary claim by ID in the Claims dashboard, view the patient file to determine who the secondary insurance payer should be. Practices will follow their processes to create the invoice(s) necessary for the secondary payer. Return to the Receive Payments screen to complete the payment. Click '+ Add Invoices.' In the Select Invoices modal, complete a search and select the invoice.
Payment file failed to process	Payment Generation failed for Insurance Remittance: <internal ref="">. Please contact customer support for further assistance.</internal>	Contact Customer Support
All claims within remit were not found	Remit with ID: <remit id=""> and check or EFT number: <payment ref=""> resulted with no payments being created.</payment></remit>	 Log into the Trizetto Portal to review the Remit ID from the message. Manually post that payment.
Individual claim ID not found	Cannot create payment for Insurance Claim ID: <claimid> + Invalid Insurance Claim ID: <claimid>.</claimid></claimid>	 Log into the Trizetto Portal, search for Claim ID to review a Remit Advice. Manually post that payment.
A payment was received as a bonus payment and is not linked to a particular claim.	Check or EFT number: (#) had Provider Adjustments in the amount of \$28.00. This money is not associated to any one claim ID, please review the remittance advice.	Follow office policy on how to allocate the bonus funds



Resolving Payment Note Generated Errors

• Payment note generated errors can be found under the '**Notes**' tab on the payment screen.

Error Scenario	Note Generated	How to Resolve
Line item within the remit is no longer on Invoice.	Cannot create payment invoice item for invoice ID: <invoiceid>. Invoice Item for service code (service code) with modifiers: none is not active. (will list modifiers if modifiers available)</invoiceid>	The following steps resolve four of the five error scenarios:1. Access the invoice to correct the information noted in the message.
Multiple identical invoice items found.	Cannot create payment invoice item for Invoice ID: (invoice). Unable to locate invoice line items for service code (service code) with modifiers (modifiers or none if none listed), date of service (date of service), and amount USD (amount).	 2. Return to the Receive Payments screen to complete the payment. 3. Click '+ Add Invoices.' 4. In the Select Invoices modal, complete a search and select the invoice.
Invoice not in a status that can accept payments. Invoice is in Pending, Paid, On Hold or Void status.	Cannot create payment for Insurance Claim ID: <claimid>. Associated Invoice <invoiceid> cannot receive payments.</invoiceid></claimid>	5. Complete the payment.
Invoice items are missing.	Cannot create payment for Insurance Claim ID: <claimid>. Associated Invoice <invoiceid> does not have line items.</invoiceid></claimid>	
An adjustment code is on the Remit Advance but not configured in Admin.	Cannot create adjustment for an invoice item for Invoice id: (#) code (service code) with modifiers (modifiers or none if none listed), date of service (date of service), and amount USD (amount), adjustment code: (#) has not be configured in RevolutionEHR.	 Log into the Trizetto Portal, search for Claim ID to review a Remit Advice. Manually allocate patient transfer and/or writes accordingly based on the adjustment code. If a commonly used adjustment code, configure in Admin by going to Admin > Data Configuration > Accounting > Auto-Posting Adjustment Code Associations. Use Add button to add new code to the list.