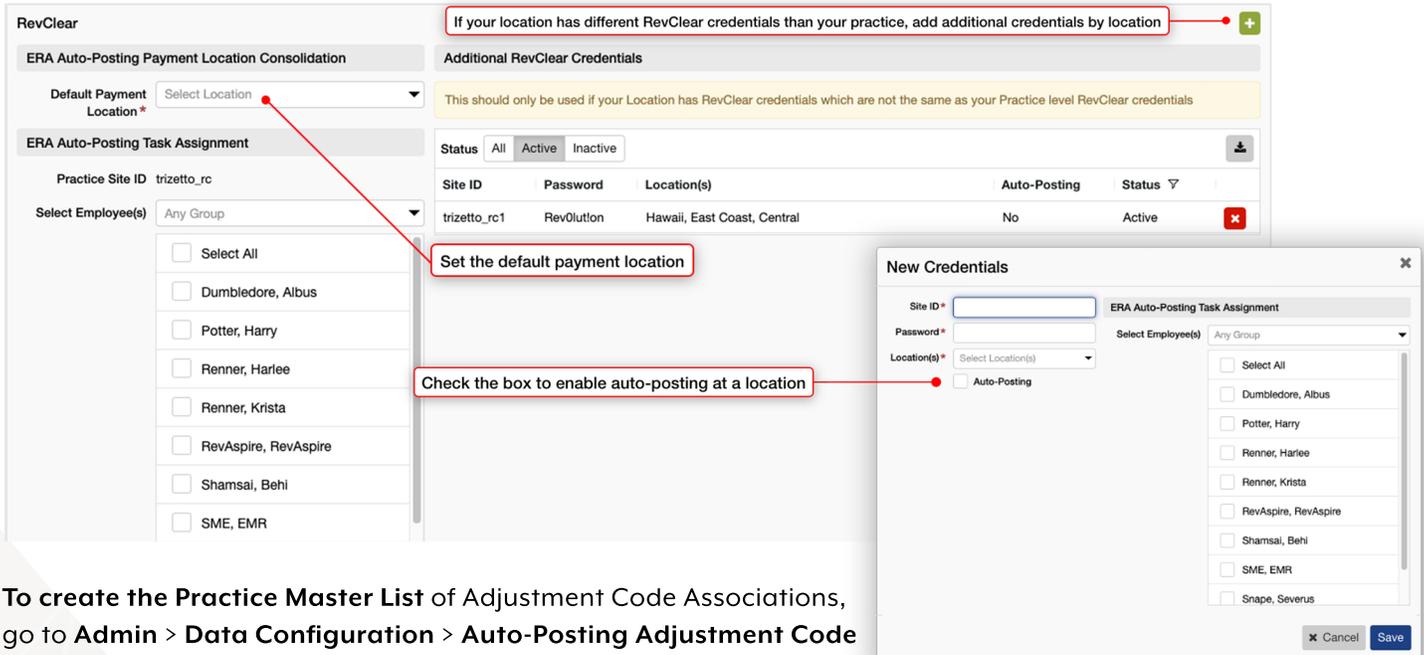


RevolutionEHR introduces the ability to **automatically allocate payments** based on ERA data

## 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**.



**RevClear** If your location has different RevClear credentials than your practice, add additional credentials by location +

**ERA Auto-Posting Payment Location Consolidation**

Default Payment Location\* Select Location

**ERA Auto-Posting Task Assignment**

Practice Site ID trizetto\_rc

Select Employee(s) Any Group

**Additional RevClear Credentials**

This should only be used if your Location has RevClear credentials which are not the same as your Practice level RevClear credentials

Status All Active Inactive

| Site ID      | Password   | Location(s)                 | Auto-Posting | Status                                    |
|--------------|------------|-----------------------------|--------------|---|
| trizetto_rc1 | RevOlulton | Hawaii, East Coast, Central | No           | Active <span style="color: red;">✖</span> |

**New Credentials**

Site ID\*

Password\*

Location(s)\* Select Location(s)

Auto-Posting

ERA Auto-Posting Task Assignment

Select Employee(s) Any Group

Select All

Dumbledore, Albus

Potter, Harry

Renner, Harlee

Renner, Krista

RevAspire, RevAspire

Shamsai, Behi

SME, EMR

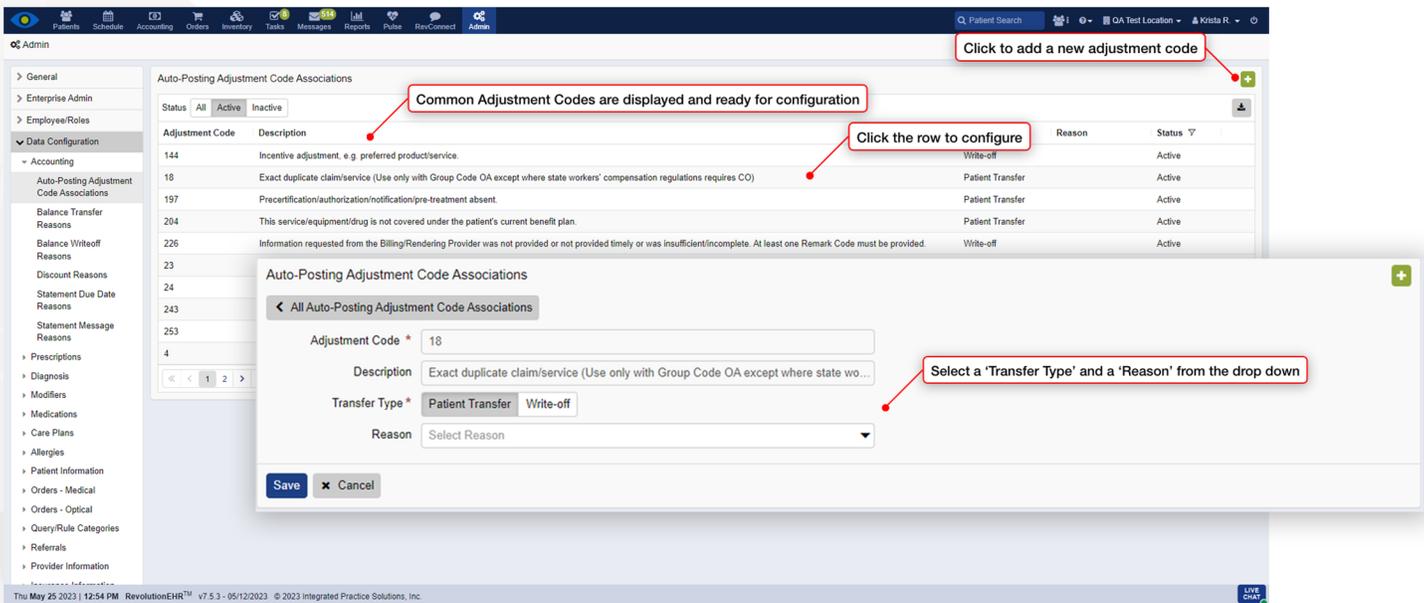
Snape, Severus

✖ Save

**Annotations:**

- Set the default payment location (points to Default Payment Location)
- Check the box to enable auto-posting at a location (points to Auto-Posting checkbox)

- ▶ 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.



**Auto-Posting Adjustment Code Associations**

Status All Active Inactive

| Adjustment Code | Description  | Reason           | Status |
|-----------------|--|------------------|--------|
| 144             | Incentive adjustment, e.g. preferred product/service.  | Write-off        | Active |
| 18              | Exact duplicate claim/service (Use only with Group Code OA except where state workers' compensation regulations requires CO)   | Patient Transfer | Active |
| 197             | Pre-certification/authorization/notification/pre-treatment absent.   | Patient Transfer | Active |
| 204             | This service/equipment/drug is not covered under the patient's current benefit plan.   | Patient Transfer | Active |
| 226             | Information requested from the Billing/Rendering Provider was not provided or not provided timely or was insufficient/incomplete. At least one Remark Code must be provided. | Write-off        | Active |

**Auto-Posting Adjustment Code Associations**

Adjustment Code\* 18

Description Exact duplicate claim/service (Use only with Group Code OA except where state wo...

Transfer Type\* Patient Transfer Write-off

Reason Select Reason

Save ✖ Cancel

**Annotations:**

- Click to add a new adjustment code (points to + icon)
- Common Adjustment Codes are displayed and ready for configuration (points to table)
- Click the row to configure (points to row 18)
- Select a 'Transfer Type' and a 'Reason' from the drop down (points to Transfer Type and Reason dropdowns)

- ▶ 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**.

**Receive Payment(s)**

Please review payment notes, tasks, and the ERA before applying the payment to ensure accuracy

**Payer Name:** Blue Cross Blue Shield (Payment: #302) PENDING

**Details** | Notes

Payment details are populated from ERA

Payment Amount\* \$ 17.00 Reference/Check # 800

Apply in Full  Payment Date 05/18/2023

Payment Method\* EFT Location\* AutoPosting Multiple NBL

Comments Allocation of adjustments

Write-Off Select Reason Add

Reason No records to display

| #   | Invoice Date | Service Date | Patient Name | Total    | Balance  | Payment  | Items   | Transfer | New Balance |
|-----|--------------|--------------|--------------|----------|----------|----------|---------|----------|-------------|
| 892 | 05/18/2023   | 05/18/2023   | Bear, Barley | \$155.00 | \$155.00 | \$ 17.00 | \$17.00 | \$10.00  | \$128.00    |

Allocation of funds by line item

Click to view details

**Payment Items**

Invoice #892 for Bear, Barley\*

Transfer Type: Transfer Write-off Select Transfer Reason Include All Items in Transfer

Transfer To: Patient Insurance New Invoice

+ Add Transfer / Write-off

| Code  | Description      | Qty | Unit Price | Sub-Total | Discounts | Tax    | Ext. Price | Payment  | Transfer 1 | Transfer 2 | Transfer 3 | Adjustments | Paid    | Balance  |
|-------|------------------|-----|------------|-----------|-----------|--------|------------|----------|------------|------------|------------|-------------|---------|----------|
| 92014 | COMP. OPHTH. ... | 1   | \$105.00   | \$105.00  | \$0.00    | \$0.00 | \$105.00   | \$ 12.00 | \$ 2.00    | \$ 1.00    | \$ 0.00    | -\$3.00     | \$12.00 | \$90.00  |
| 92015 | REFRACTION       | 1   | \$50.00    | \$50.00   | \$0.00    | \$0.00 | \$50.00    | \$ 5.00  | \$ 0.00    | \$ 0.00    | \$ 7.00    | -\$7.00     | \$5.00  | \$38.00  |
|       |                  |     |            |           |           |        |            | \$17.00  | \$2.00     | \$1.00     | \$7.00     | -\$10.00    | \$17.00 | \$128.00 |

| # | Type      | Reason  | To                    | All Items |
|---|-----------|---|-----------------------|-----------|
| 1 | Write-off | Exceeds benefits  |                       | No -      |
| 2 | Transfer  | Deductible - Amount applied to patient deductible         | Patient (new invoice) | Yes -     |
| 3 | Write-off | Third party discount - Fee reduced/Participating Provider |                       | No -      |

|                                     |                 |
|-------------------------------------|-----------------|
| CURRENT BALANCE                     | \$155.00        |
| Invoice Paid                        | \$17.00         |
| Items Paid                          | \$17.00         |
| Amount Transferred                  | \$10.00         |
| <b>AFTER PAYMENTS AND TRANSFERS</b> | <b>\$128.00</b> |

AutpPay Cancel Save

### 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  |
|--|---|---|
| <p>The primary invoice is for Insurance A, the secondary payment is from Insurance B. The Insurance B ERA is being processed by Auto-Posting.</p> <p>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.</p> | <p>The Task should contain all identified secondary claims on a single ERA.</p> <p>The message should be:<br/>"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."</p> <p>In the ERA file, when the claim is processed as secondary, tertiary, the system should create a task.</p> | <ol style="list-style-type: none"> <li>1. Locate the primary claim by ID in the Claims dashboard, view the patient file to determine who the secondary insurance payer should be.</li> <li>2. Practices will follow their processes to create the invoice(s) necessary for the secondary payer.</li> <li>3. Return to the Receive Payments screen to complete the payment.</li> <li>4. Click '+ Add Invoices.'</li> <li>5. In the Select Invoices modal, complete a search and select the invoice.</li> </ol> |
| <p>Payment file failed to process</p>  | <p>Payment Generation failed for Insurance Remittance: &lt;internal ref&gt;. Please contact customer support for further assistance.</p>  | <p>Contact Customer Support</p>   |
| <p>All claims within remit were not found</p>  | <p>Remit with ID: &lt;remit Id&gt; and check or EFT number: &lt;payment ref&gt; resulted with no payments being created.</p>  | <ol style="list-style-type: none"> <li>1. Log into the Trizetto Portal to review the Remit ID from the message.</li> <li>2. Manually post that payment.</li> </ol>  |
| <p>Individual claim ID not found</p>   | <p>Cannot create payment for Insurance Claim ID: &lt;claimId&gt; + Invalid Insurance Claim ID: &lt;claimId&gt;.</p>   | <ol style="list-style-type: none"> <li>1. Log into the Trizetto Portal, search for Claim ID to review a Remit Advice.</li> <li>2. Manually post that payment.</li> </ol>  |
| <p>A payment was received as a bonus payment and is not linked to a particular claim.</p>  | <p>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.</p>   | <p>Follow office policy on how to allocate the bonus funds</p>  |

## 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: <invoiceld>. Invoice Item for service code (service code) with modifiers: none is not active. (will list modifiers if modifiers available)  | <p><b>The following steps resolve four of the five error scenarios:</b></p> <ol style="list-style-type: none"> <li>1. Access the invoice to correct the information noted in the message.</li> <li>2. Return to the Receive Payments screen to complete the payment.</li> <li>3. Click '+ Add Invoices.'</li> <li>4. In the Select Invoices modal, complete a search and select the invoice.</li> <li>5. Complete the payment.</li> </ol>                        |
| 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).                 |  |
| 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 <invoiceld> cannot receive payments.   |  |
| Invoice items are missing.   | Cannot create payment for Insurance Claim ID: <claimId>. Associated Invoice <invoiceld> does not have line items.  |  |
| 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. | <ol style="list-style-type: none"> <li>1. Log into the Trizetto Portal, search for Claim ID to review a Remit Advice.</li> <li>2. Manually allocate patient transfer and/or writes accordingly based on the adjustment code.</li> <li>3. If a commonly used adjustment code, configure in Admin by going to Admin &gt; Data Configuration &gt; Accounting &gt; Auto-Posting Adjustment Code Associations. Use Add button to add new code to the list.</li> </ol> |