

axiUm Training

University of Kentucky
College of Dentistry

Insurance Posting Module

Insurance Posting - June 15, 2006 - Lori Bruelheide



Session Highlights

- Processes for posting cash, check and credit card payments received from the patient in the clinic
 - Overview
 - Demonstration/Questions
 - Practice
- Session Length: **1.5 Hours**
- Notebook Materials:
 - Slides
 - Notes
 - Flow Chart
- Advisor:
 - Lori Bruelheide, Insurance Manager

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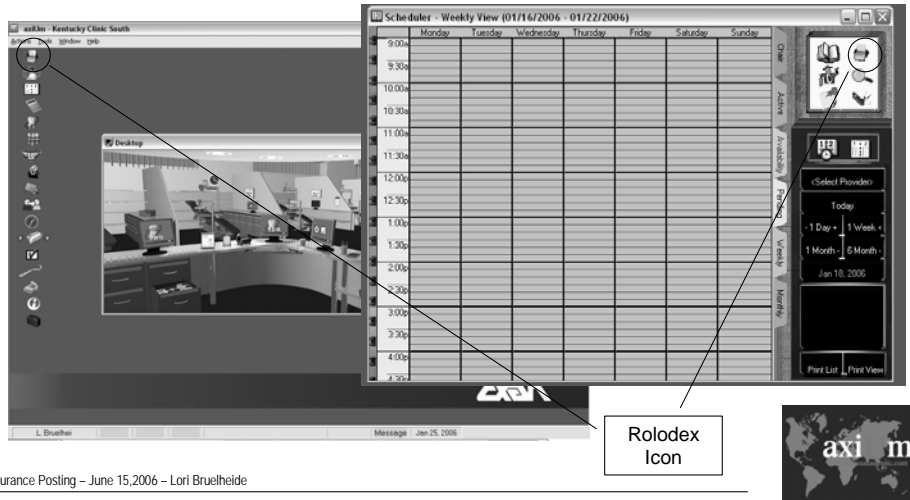


Why Axium:

- Path to electronic patient record
- Used in 24 other U.S. dental schools
- Provides greater educational exposure for students and residents.
- State-of-the-art Technology for staff , faculty students/residents recruiting
- Increased efficiency
- Improved reporting
- More user-friendly
- EPR will permit view all patient encounters across clinics.

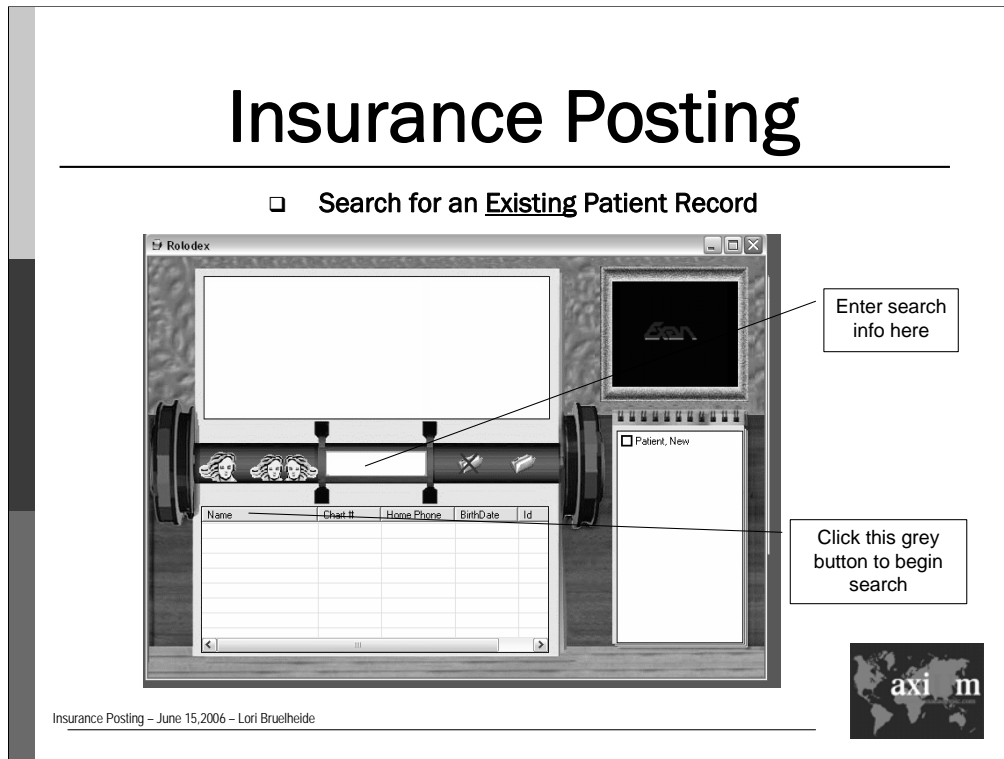
Insurance Posting

- ❑ Choose Rolodex icon from the Desktop or Scheduler Book view



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The **Rolodex** may be accessed from either the **Desktop** or the **Scheduler Book**



From the main **Rolodex** screen, search for an existing patient record.

To start a search, type Lookup Info in the **Search Block**. Searches may be by patient name, Chart #, Social Security Number or birth-date.

Name – Search in this order: Patient last name, first name; Patient maiden name, first name

To search using both names, type 3-4 characters of the patient last name, a comma, then at least one character of the first name (no spaces)

After entering name, click the grey “Name” box on the bottom part of the screen

Chart # - Enter chart number and click the grey “Chart #” box

Social Security # - Enter SSN without dashes and click the grey “ID” box

Date of Birth – Enter patient date of birth in MM/DD/YY format (including slashes) and click the grey “BirthDate” box

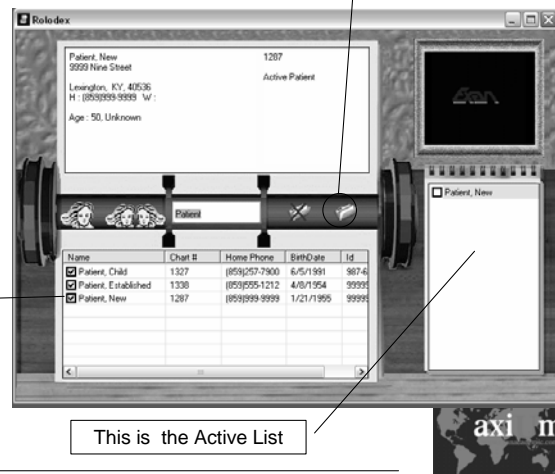
Insurance Posting

□ Access the Patient Card

Note: Patient must be selected to the Active List before proceeding

Double-clicking the name will move the patient to the Active List

This is the Patient Card button



This is the Active List

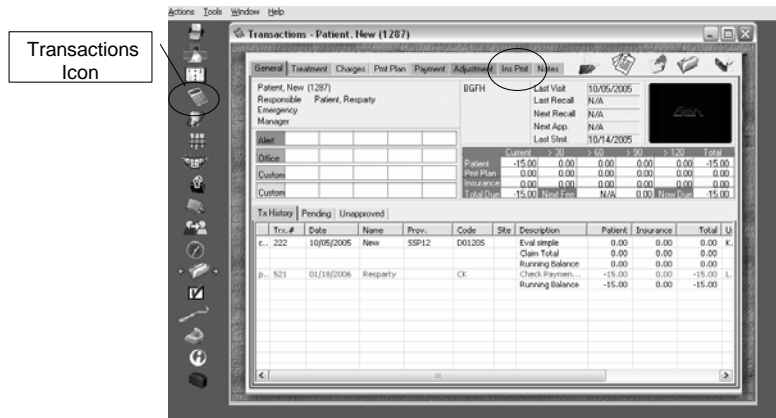
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If patient exists, select the patient by double-clicking patient name to **Active List**

- Access the **Patient Card** to confirm existing data (preferred name, date of birth, phone number, address, responsible party, insurance information)
- To access the **Patient Card**, select the patient by clicking on the name in the **Active List** then click the **Patient Card** icon
- If the patient's name should always appear in the Active List, check the box to the left of the patient name by highlighting the patient name in the Active List and Right-Clicking. Choose "Hold Patient in List." This will retain that patient's name in the Active List even if the List is cleared.

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- Access Transactions Window
Choose Ins Pmt Tab



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The **Transactions** view defaults to the **General** tab.
 Select the **Payment** tab to post a payment.

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□ Select the Insurance Payor

Type the name of the Insurance Company issuing the check and click the Name button

Code	EDI	T	Name
123			KY Farm Bureau Farm Bureau
234			CHA Health
333			Bluegrass Family Health
86FH			Dental Insurance Plan
D1234			

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Select an **Insurance Payor** and click the Name field to display a list of insurance companies.

Insurance Posting

Enter the Check Information

Click "Add" to add this check.

After the check is entered, click "Pt. Allocate" to apply the money

Trx. #	Date	Bank	Code	Description	Amount	Applied	Hold
481	12/21/2005	CDINS	IP	Insurance Payment	100.00	0.00	100.00
482	12/21/2005	CDINS	IP	Insurance Payment	100.00	0.00	100.00
483	12/21/2005	CDINS	IP	Insurance Payment...	71.00	0.00	71.00
484	12/21/2005	CDINS	IP	Insurance Payment...	71.00	0.00	71.00
485	12/21/2005	CDINS	IP	Insurance Payment...	120.00	0.00	120.00
486	12/21/2005	CDINS	IP	Insurance Payment...	120.00	15.00	105.00
541	02/06/2006	CDINS	IP	Insurance Payment	75.00	0.00	75.00
542	02/06/2006	CDINS	IP	Insurance Payment	75.00	0.00	75.00
				Total	632.00	15.00	417.00

Bank Code will default to CDINS. If this is incorrect, it must be changed.

Add the Check # or RA # here.

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Choose a **Code** that details the type of payment from the list by clicking the **"More"** button.

- If the payment is a check, enter the check number next to the description of the payment type.
- If the payment is a direct deposit, enter the RA number next to the description of the payment type.

Enter the current date and the amount of the check.

Bank Code will default to CDINS. You may change this field, if necessary.

Choose **"Pt Allocate"** to apply the payment.

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□ Allocate the Payment

Applying Ins. Payment

Ins. Payment
NP1 - New Insurance Plan

Owing 0.00 Split
Apply 0.00 Code P Description Insurance Payment
Transfer 0.00 Reason Description
Write Off 0.00 Reason Description
Balance 0.00

Prnt # 994
Date 12/21/2005
Amount 71.00
Transfer To Patient
Remaining 71.00

Submitted Claims Only?

Load All
Apply

Trx #	Date	Name	Code	Site	Suff	Total	Subscriber #	Ins.	Other Co.	Insurance	Applied	Outstanding
1285	11/03/2005	Patien. Es.	D0120			25.00	999999999	1		0.00		0.00
1285	11/03/2005	Patien. Es.	D1110			56.00	999999999	1		0.00		0.00
1288	12/08/2005	Patien. Es.	D2140	13	0	44.00	999999999	1		0.00		0.00

Select the first patient on the remit and double-click.

Choose "Load All" to see all patients with open claims for this insurance payor

Un-checking this box allows display of claims that have not yet been submitted to Insurance

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Click "**Load All**" to display all patients with open claims for the selected insurance company.

- Un-checking the box labeled "**Submitted Claims Only**" will display all claims for that insurance company, even those that have been entered but not submitted.

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Keep track of how much remains unapplied on the check with the
“Remaining” field

Continue until entire check is posted

The screenshot shows the 'Applying Ins. Payment' window. It includes fields for 'Owing', 'Apply', 'Transfer', 'Write Off', and 'Balance'. There are also fields for 'Code', 'Reason', 'Description', 'Amount', and 'Transfer To'. A table at the bottom lists patient transactions with columns for 'Trx #', 'Date', 'Name', 'Code', 'Site', 'Stat', 'Total', 'Subscriber #', 'Ins', 'Other Co.', 'Insurance', 'Applied', and 'Outstanding'. Callout boxes provide instructions: 'Enter amount of payment' points to the 'Apply' field; 'For Participating Insurances only, make any necessary adjustments and choose the adjustment reason' points to the 'Write Off' field; 'Be sure to enter the amount to be transferred to patient responsibility (the remainder of what is paid + what is adjusted). Choose a reason for patient responsibility' points to the 'Transfer' field; and 'Click the Apply button to finalize the Allocation' points to the 'Apply' button.

Enter amount of payment

For Participating Insurances only, make any necessary adjustments and choose the adjustment reason

Be sure to enter the amount to be transferred to patient responsibility (the remainder of what is paid + what is adjusted). Choose a reason for patient responsibility

Click the Apply button to finalize the Allocation

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Select/Highlight the first patient from the list that is on the Remittance Advice

- Apply the payment by entering the amount of the payment
- Enter any patient responsibility amounts in the “**Transfer**” box to transfer the balance to the patient. Choose the appropriate transfer reason and check to make sure that the “**Transfer To**” field indicates Patient.
- For participating insurance companies enter any amount to be adjusted from the account in the “**Write Off**” field. Choose the appropriate adjustment reason.
- Click “**Apply**”

Continue for all accounts on the Remittance Advice.