

# axiUm Training

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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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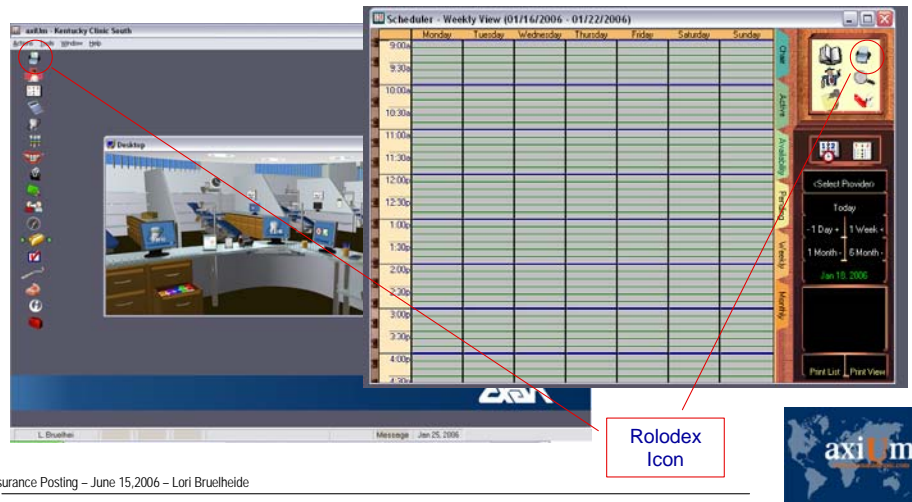


### Why Axium:

- 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

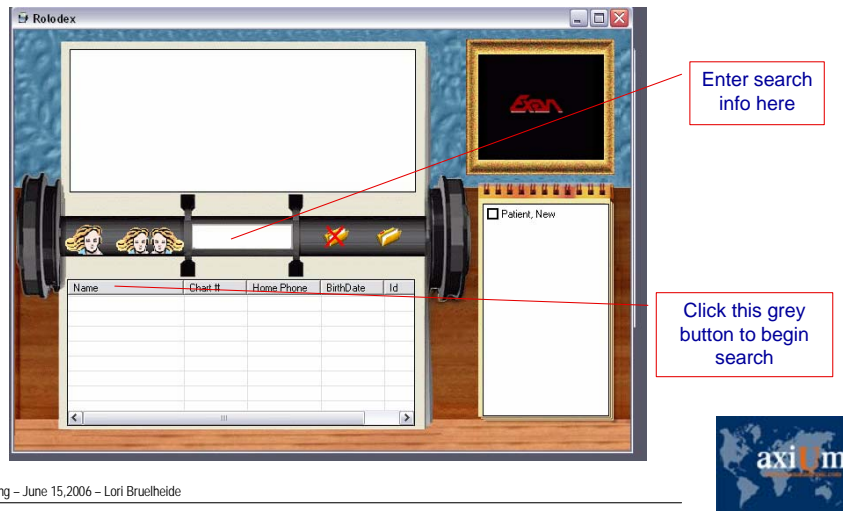
- Choose **Rolodex** icon from the Desktop or Scheduler Book view



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

# Insurance Posting

## Search for an Existing Patient Record



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

Name	Chart #	Home Phone	BirthDate	Id
<input checked="" type="checkbox"/> Patient, Child	1327	(859)257-7900	6/5/1991	9874
<input checked="" type="checkbox"/> Patient, Established	1338	(859)555-1212	4/8/1954	9999
<input type="checkbox"/> Patient, New	1207	(859)999-9999	1/21/1995	9999

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.

# Insurance Posting

- Access **Transactions** Window  
Choose **Ins** **Pmt** Tab

Transactions Icon

Transactions - Patient, New (1287)

General Treatment Charges Post Plan Payment Adjustments **Ins Pmt** Notes

Patient, New (1287) BGH1 Last Visit 10/05/2005  
 Responsible Patient, Respary Last Recall N/A  
 Emergency Manager Next Recall N/A  
 Next App N/A  
 Last Srv 10/14/2005

	Current	Pre-Plan	Insurance	Total
Patient	-15.00	0.00	0.00	-15.00
Pre-Plan	0.00	0.00	0.00	0.00
Insurance	0.00	0.00	0.00	0.00
Total Due	-15.00	0.00	0.00	-15.00

Tr.#	Date	Name	Prov.	Code	Site	Description	Patient	Insurance	Total	U
e.. 222	10/05/2005	New	SSP12	D01205		Eval simple	0.00	0.00	0.00	K.
						Claim Total	0.00	0.00	0.00	
						Running Balance	0.00	0.00	0.00	
p.. 521	01/18/2006	Respary		OK		Check Payment...	-15.00	0.00	-15.00	L.
						Running Balance	-15.00	0.00	-15.00	

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

# Insurance Posting

- Select the Insurance Payor

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

The screenshot shows the 'Transactions - Patient - New (1287)' window. The 'Ins. Payment' tab is selected. The 'List Insurance' section contains a table with columns for Code, EDI, T, Name, and a Name button. The 'Name' field is highlighted with a red circle, and the 'Name' button is also highlighted. A text box on the left explains that the user should type the insurance company name and click the Name button.

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

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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

The screenshot shows the 'Transactions - Patient, New (1287)' window. The 'Code' field is set to 'SP' and the 'Description' is 'Insurance Payment Check #7778'. The 'Bank' field is set to 'CDINS'. The 'Pt. Allocate' button is highlighted. A table below shows a list of transactions for the patient:

Trx. #	Date	Bank	Code	Description	Amount	Applied	Hold
481	12/21/2005	CDINS	SP	Insurance Payment...	100.00	0.00	100.00
482	12/21/2005	CDINS	SP	Insurance Payment...	71.00	0.00	71.00
483	12/21/2005	CDINS	SP	Insurance Payment...	71.00	0.00	71.00
484	12/21/2005	CDINS	SP	Insurance Payment...	120.00	0.00	120.00
485	12/21/2005	CDINS	SP	Insurance Payment...	120.00	0.00	120.00
486	12/21/2005	CDINS	SP	Insurance Payment...	120.00	15.00	105.00
541	02/06/2006	CDINS	SP	Insurance Payment...	75.00	0.00	75.00
542	02/06/2006	CDINS	SP	Insurance Payment...	75.00	0.00	75.00
Total					632.00	15.00	617.00

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.

# Insurance Posting

## Allocate the Payment

**Applying Ins. Payment**

Ins. Payment  
NP1 - New Insurance Plan

Owing: 0.00    Split    Pmt #    Date: 12/21/2005    Close

Apply: 0.00    Code:    Description: Insurance Payment    Amount: 71.00

Transfer: 0.00    Reason:    Description:    Transfer To: Patient

Write Off: 0.00    Reason:    Description:    Remaining: 71.00    Load All    Apply

Balance: 0.00     Submitted Claims Only?

Trx #	Date	Name	Code	Site	Suf1	Total	Subscriber #	Ins.	Other Co.	Insurance	Applied	Outstanding
1285	11/03/2005	Patient, Es.	D0120			25.00	999999999	1		0.00		0.00
1285	11/03/2005	Patient, Es.	D1110			56.00	999999999	1		0.00		0.00
1288	12/08/2005	Patient, 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.

# Insurance Posting

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 information and payment details. 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.