Entering Insurance Payments

Buttons

**New:** Clears all entries and adds defaults any applicable fields. Add : Adds the record to the list.

**Modify:** Saves any field changes made to the selected item. Not pressing this button after making changes will cause them to be discarded.

**Delete:** Deletes the currently selected item. Only unallocated and unadjusted insurance payments can be deleted.

**Allocate:** Apply the payment to treatments and charges with insurance balances owing.

1. If the check is for multiple patients, select any patient card
   OR
2. If the check is for one patient, select that patient card
3. Click on the **Transactions** icon on the opening screen.
4. Click on the **Insurance Payment** tab
5. For multiple patients click on the **Ins. Payments** sub tab located in the middle of the screen OR
6. For one patient, click on the **Ins. Payments for Patient** sub tab located in the middle of the screen
7. In the **List Insurance** section, select the Insurance company by either typing in the insurance code and click on code or type the name and click on name, i.e. Code for Denti-Cal is *’DCSA’*
8. Click on **New** to add today's date
9. Type in the amount of the check
10. Code is IP
   a. **Code:** Enter IP
   b. **Description:** Fill in the check number
   c. **Double check all of your entries before you click ADD.**
   d. **Bank:** It will be defaulted to your cashier station.
2. Press on the **Add** button.
3. If Multiple patients, select **Allocate**
   OR
4. If one patient, select **Pt. Allocate**
5. In the **Remaining section,** you will see the amount remaining on the check
6. Highlight each line, the expected claim amount will appear in the **Apply** box,
7. If insurance paid the full amount of the claim, click **Apply**
8. If insurance paid a partial amount of the claim, enter the amount in the apply box
9. Now choose a code **Write Off** or **Transfer to Patient,** the amount and the reason boxes are available to enter the amount
10. Enter the **write off or transfer to patient** amount
11. Choose a Reason from the list.
12. Click **Apply**
13. When you get to remaining of zero, you can close your screen.

**To view the insurance check disbursement**

1. Choose check from list

<table>
<thead>
<tr>
<th>Tx #</th>
<th>Date</th>
<th>Bank</th>
<th>Code</th>
<th>Description</th>
<th>Amount</th>
<th>Applied</th>
<th>Held</th>
</tr>
</thead>
<tbody>
<tr>
<td>242551</td>
<td>06/19/2009</td>
<td>INS1</td>
<td>IP</td>
<td>Ins Check #9567</td>
<td>94.15</td>
<td>94.15</td>
<td>0.00</td>
</tr>
<tr>
<td>242552</td>
<td>06/19/2009</td>
<td>INS1</td>
<td>IP</td>
<td>Ins Check #9567</td>
<td>33.00</td>
<td>33.00</td>
<td>0.00</td>
</tr>
<tr>
<td>242553</td>
<td>06/19/2009</td>
<td>INS1</td>
<td>IP</td>
<td>Ins Check West</td>
<td>340.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>242554</td>
<td>06/19/2009</td>
<td>INS1</td>
<td>IP</td>
<td>Ins Check #</td>
<td>265.25</td>
<td>265.25</td>
<td>0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td><strong>Total</strong></td>
<td>772.44</td>
<td>432.44</td>
<td>0.00</td>
</tr>
</tbody>
</table>

2. Right-click on the check and select **disbursement**
3. Your goal is to get to $0 in the **Held** column.

![Image of axiUm Transactions - Ins. Payment interface]

<table>
<thead>
<tr>
<th>Trans #</th>
<th>Date</th>
<th>Bank</th>
<th>Code</th>
<th>Description</th>
<th>Amount</th>
<th>Applied</th>
<th>Held</th>
</tr>
</thead>
<tbody>
<tr>
<td>242591</td>
<td>06/19/2009</td>
<td>INS1</td>
<td>IP</td>
<td>Ins Check #4567</td>
<td>84.15</td>
<td>84.15</td>
<td>0.00</td>
</tr>
<tr>
<td>242592</td>
<td>06/19/2009</td>
<td>INS1</td>
<td>IP</td>
<td>Ins Check #9679</td>
<td>83.00</td>
<td>83.00</td>
<td>0.00</td>
</tr>
<tr>
<td>242593</td>
<td>06/19/2009</td>
<td>INS1</td>
<td>IP</td>
<td>Ins Check #99</td>
<td>340.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>242595</td>
<td>06/19/2009</td>
<td>INS1</td>
<td>IP</td>
<td>Ins Check #44</td>
<td>265.23</td>
<td>265.23</td>
<td>0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td><strong>Total</strong></td>
<td><strong>722.44</strong></td>
<td><strong>432.44</strong></td>
<td><strong>0.00</strong></td>
</tr>
</tbody>
</table>
Transferring uncovered treatment charges to the patient

1. **After steps 1-16** above, do the following:
2. Enter $0 in the **Apply** as there is no payment
3. Enter **Transfer** in the box below the words **Apply**
4. Enter the appropriate amount to transfer
5. Choose the transfer **Reason**
6. On message if you are accurate, please say **Yes**
7. In the General tab of Transactions it will credit the insurance and charge the patient side. Under reason code used in the example 'P_' COPType in the amount of the check

Parent Company Codes To Be Used for Posting Ins. Bulk Check

Following is a list of the ‘Parent Companies’ created to allow the posting of a bulk insurance check. For example use **DENTIC** for code plans DCSA, DCSALH, DCSA3, etc.

1. **DENTIC** – Denti-Cal
   a. DCS1 – DENTI-Cal
   b. DCSA
   c. DCSA2
   d. DCSA3

2. **HEALTH** – Delta Healthy Plan
   a. HELFD – Healthy Families
   b. HELKD – Healthy Kids/Delta
   c. HLTHSM – Health Plan of San Mateo/Delta

3. **DELTA** – Delta Dental
   a. DDP1 – Delta Dental of California
   b. DDPSA1 – Delta Dental of California
   c. DUSSAC – Delta U.S.A.

4. **PREMIR** – Premier Access
   a. PAISA – Premier Access Insurance Co.
   b. PAPPO – Premier Access/Ppo
   c. DCSALH