835/ERA Auto-posting Instructions

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Posting

From the 835 auto-post screen, select the EOB/835 you wish to post. Click the Post 835 button on the top of the window and the program will begin to read in the 835 file. If the program asks you to select an insurance company do so in the Medisoft Insurance column, then click on Post 835 again. You should not have to select an insurance code every time you post an EOB/835.

When the program is done reading in the 835 file, the program will show you a list of claims and their status contained in the EOB/835.

Clicking on the gear icon at the top of this window will show you a list of adjustments that appear in the EOB/835 file. Each adjustment has ten options in 2 levels. The first level is for the current 835 file. The second level tells the program how to treat the adjustments in future 835s. To access the second level click on the plus sign next to each adjustment.

AdjustmentCode: this is the adjustment code you want to use for the 835 adjustment.
Apply : tells the program to apply this adjustment when the insurance has processed the claim as the primary payer.

ApplySecondary: tells the program to apply the adjustment when the insurance has processed the claim as the secondary payer.

ApplyZeroPayment: tells the program to apply a zero payment and mark the charge complete when this adjustment appears in the transaction level adjustments.

StatementNote: this is a free text note field that will be added to the Medisoft charge transaction as a statement note.

Once you have reviewed the adjustments, click either Continue and Review or Continue and Post. Continue and Review will allow you to print a report of what the program will and will not be posting. After clicking on Continue and Review, to print the report click the Printer Icon. To post the 835 click on the Apply button(1st icon on the left).

Other options that affect the 835 auto-post are

Apply 1 cent adjustments and zero payments to 1 cent charges. This is used to adjust and mark complete charges that are sent to the payer for reporting purposes. This option requires an adjustment code to be setup for at least one of the Reason Codes that appear on the detail line of the claim. You do not have to choose to apply the adjustment. Choosing not to apply the adjustment while choosing an adjustment code and checking the Apply 1 cent adjustments box will cause the program to apply the adjustment only when the charge amount and the adjustment amount 1 cent and the payment

is zero. The zero payment will be applied too.

Modify Crossover Status. Checking this option will make the program check the crossover check box in the patient's Case/Policy 2 tab when the 835 indicates the primary payer forwarded the claim to a secondary. The program will also uncheck the box if the 835 indicates the payer did not forward the claim. This does not affect currently created claims.

Use Alternative Lookup to find charges. From time to time a payer will not return the unique identifier required to match the payment to the charge in Medisoft. This option will cause the program to search for a matching the Chart Number from the charge with the first 8 characters of the claim id and the Date of Service and the first 5 characters of the Procedure Code.

Record 835 : this option saves the primary payment and adjustment information so that billing secondary claims electronically becomes easier.

Print 835 : Prints an EOB like report from the 835 data. More options are available under the drop down menu under Print. Such as printing only the Denied claims or only the Reversal claims.