

Posting Multiple Insurance Transactions from a single EOB

07/08/2024 7:49 pm EDT

To make things easier to post multiple payments from a single-payer EOB, DrChrono has an area that allows for the posting of multiple lines of transactions instead of adding a line item for each charge.

- Go to **Billing > Live Claims Feed**

Billing

BILLING

- Billing Summary
- Live Claims Feed**
- Patient Payments
- Day Sheet
- Transactions
- Remittance Reports
- Unmatched ERAs
- Insurance Credit Card Payments
- Accounts Receivable
- Patient Statements
- Product/Procedure
- Patient Balance Ledger
- Fee Schedule
- Underpaid Items
- Adjustment Master
- Sales Tax
- Billing Log

- Select the patient (red). You may also need to expand the date range (blue). The system will default to 1 month from the current date, but you can change the beginning date back a year or more to ensure that you capture all of the patient's appointments.

Live Claims Feed

Select All Offices Select None A nursing home All B Assisted Living All C new office All D Inpatient

Primary Office All Primary Office All Telehealth All

Claim St All Billing St: All Appt Profiles: All Calculate Counts What's this? TFL War

Jenny (Jen) Harris Payer Name Payer ID drc claim # 09/28/2020 - 10/28/2020

Open window in new tab

- Select the date of service that corresponds to the payment received

Info	Claim ID	Patient	Date of Service	Office	Provider	Supervising Provider	Billed	Allowed	Adjmt	Ins 1 Paid	Ins 2 Paid	Pt Paid	Ins Bal	Pt Line Item Bal	Claim Bal	Exp Reimbr	Ins 1	Ins 1 Status
Totals:							\$245.00	\$245.00	\$0.00	\$0.00	\$0.00	\$0.00	\$220.00	\$25.00	\$245.00	\$0.00		
<input type="checkbox"/>	158141998	Jenny (Jen) Harris	10/05/2020 09:00AM	Primary Office			\$245.00	\$245.00	\$0.00	\$0.00	\$0.00	\$0.00	\$220.00	\$25.00	\$245.00	\$0.00	Aetna	Bill Insurance
Totals:							\$245.00	\$245.00	\$0.00	\$0.00	\$0.00	\$0.00	\$220.00	\$25.00	\$245.00	\$0.00		

- Scroll to the bottom of the page to where the charges are showing. Click on the Add Batch Transaction icon, which is on the right side of the screen, directly across from the code, and charge.

Code/Check Date	Description	Mods/Posted Date	Service Date	EPSTDT	Qty/Min	Dx Pointers	Price	Billed	Allowed	Adjmt	Ins 1 paid	Ins 2 paid	Pt Paid	Ins Bal	Pt Bal	Status/Adj Type
Totals:								\$245.00	\$245.00	\$0.00	\$0.00	\$0.00	\$0.00	\$220.00	\$25.00	Bill Insurance
C 99214			From date To date		1.00	1 0 0 0	175.00	\$175.00	\$175.00	\$0.00	\$0.00	\$0.00	\$0.00	\$175.00	\$0.00	Bill Insurance
H J3301			From date To date		1.00	1 0 0 0	45.00	\$45.00	\$45.00	\$0.00	\$0.00	\$0.00	\$0.00	\$45.00	\$0.00	Bill Insurance
U COPY.0FR			From date To date		1.00	1 0 0 0	25.00	\$25.00	\$25.00	\$0.00	\$0.00	\$0.00	\$0.00	\$25.00	\$0.00	Balance Due

- You only need to click on 1 of them. This picture was added so it's a little easier to see.

Status/Adj Type	
0 Bill Insurance	
0 Bill Insurance	
0 Bill Insurance	
0 Balance Due	

- A Batch Add Transactions window will open that will allow you to post the payer response to multiple line items on the same screen.
 - **Trace Number** - Enter the check number or some other tracking number that is listed on the paper EOB. Adding a scanned copy of the EOB to your Remittance Report section will allow an image to populate next to each payment posted. Check out this article ([link](#)) to see how to easily add your EOBs.
 - **Check Date** - Enter the date of the check
 - **Payer** - The correct payer should be showing, but the drop-down will allow you to select a different payer that is listed on the patient's account.
 - **Line Item** - This will list the separate charges on the account (CPT, HCPCS, and/or Custom Codes).
 - **Adjustment** - Enter the contractual adjustment (or CO45)
 - **Ins Payment** - Enter the amount the payer paid
 - **Co-ins/Pt Resp** - Enter the amount of any co-ins or other patient responsibility (non-covered, max benefits, etc)
 - **Copay** - Enter the amount of any copay assigned.

Batch Add Transactions



Trace Number

Check Date

Payer

Line Item

Adjustment

Ins Payment

Co-ins/Pt Resp

Copay

- Here is an example of how it would look once entered:
 - Please note, that any copay amount should be listed on the copay line and **not** included on the co-ins/pt resp line. Doing so will cause it to post with an incorrect claim adjustment reason code.

Batch Add Transactions



Trace Number

Check Date

Payer

Line Item

Adjustment

Ins Payment

Co-ins/Pt Resp

Copay

Once the data for the line item/charge is entered, click on **Add**. The system will post the transactions for you and it will look like this:

99214		From date	To date		1.00	1	0	0	0	175.00	\$175.00	\$135.00	\$40.00	\$100.00	\$0.00	\$0.00	\$0.00	\$35.00	Balance Due
10/28/2020	10/28/2020	Check # 12345		+							45: Charge excee	40.00	0	[1] Aetna	1: Processed	CO: Contr	ADJ INSURER		
10/28/2020	10/28/2020	Check # 12345		+							Insurance Payme	0	100.00	[1] Aetna	1: Processed	CO: Contr			
10/28/2020	10/28/2020	Check # 12345		+							2: Coinsurance Ai	15.00	0	[1] Aetna	1: Processed	PR: Patier	PATIENT RESP		
10/28/2020	10/28/2020	Check # 12345		+							3: Co-payment Ai	20.00	0	[1] Aetna	1: Processed	PR: Patier	SKIP SECONDARY		

Now you can repeat the same procedure for each line item that is listed on the paper EOB.

Pro tip - Have as many payers set up on ERA as possible. The same information will be sent by the payer, just in an electronic file. This file will come into your DrChrono account, be visible under the **Remittance Report** section, and will post automatically for you, eliminating the need to post it manually. This will improve efficiency and allow you to focus on other things.

Contact your account manager or support for assistance in getting set up. Please note, that most but not all payers offer ERAs, but it's worth looking into as more and more are adding the feature.
