

How to Post a HRA Payment?

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Increasingly, employers are offering employees an HRA, or Health Reimbursement Account, to help offset medical expenses. It's not an insurance payment or a patient payment.

Currently, we do not have the option to post the HRA payment and designate it as such in DrChrono; however, as a workaround, we can post the HRA payments in two ways.

1. Adding HRA as secondary/tertiary insurance
2. By posting as a patient payment.

Option 1 - Adding HRA as secondary/tertiary insurance

Let's see how to post the payment by adding HRA as an insurance.

1. Open patient demographics
2. Navigate to the **Insurances** tab, and select secondary insurance. (If the patient has secondary insurance, you can use the tertiary insurance tab instead.)
3. Enter **HRA** in the Insurance company field and press **Save Demographics**.

The screenshot displays the DrChrono patient demographics interface for a patient named 'sample sample'. The patient's details include gender (Female), age (3 years, 1 month old), date of birth (04/01/2022), and SASA000001. The provider is Cathy Consultant, and the address is 123 Main Street, Annapolis, MD 21403. The phone number is (515) 555-5151, and the email is email@gmail.com. The patient's status is 'OnPatient' and 'Not Enabled-Invite'. The date added is 04/14/2022. The previous appointment was on 10/01/2024, and the next appointment is 'None'. There are two alerts: 'Patient must have documented medications' and 'Patient must have documented allergies'. The left sidebar shows a 'Patient Chart' with tabs for 'Patient Summary', 'Demographics', 'Appointments', 'Clinical Dashboard', 'Documents', 'Eligibility', and 'Tasks'. The 'Demographics' tab is active, and the 'Insurances' sub-tab is selected. The 'Secondary Ins' option is chosen. The 'Insurance Company' field is set to 'HRA'. The 'Carrier Payer ID' field is empty. The 'Alternate Eligibility Payer' field is empty. The 'Subscriber is the Patient' checkbox is checked. The 'Insured person is the same person as the Patient' checkbox is also checked. The 'Save to Insurance History' and 'Manage Alternative Insurances & History' links are visible. Red arrows point to the 'Insurances' tab, the 'Secondary Ins' option, and the 'HRA' field.

4. Open the appointment's billing details screen to which we need to post the payment.
5. Press the **+** sign corresponding to the line item to add a new transaction.

Line items transactions

Patient does not have unallocated payment Appt. does not have unallocated payment

| # | ICD-10 | Description | Line Item | NDC Code | Quantity | Units |
|---|--------|--|-----------|--------------|----------|-----------|
| | | Add ICD-10 code | | Add NDC code | 1 | UN (Unit) |
| 1 | M54.14 | Radiculopathy, thoracic region | | | | |
| 2 | M99.01 | Segmental and somatic dysfunction of cervical region | | | | |
| 3 | M99.02 | Segmental and somatic dysfunction of thoracic region | | | | |

| Code/Check Date | Description | Mods/Posted Date | Service Date | EPSDT | Qty/Min | Dx Pointers | Price | Billed | Allowed | Adjmt | Ins 1 paid | Ins 2 paid | Pt Paid | Ins Bal | Pt Bal | Status/Adj Type |
|-----------------|-------------|------------------|--------------|-------|---------|-------------|----------|----------|----------|--------|------------|------------|---------|----------|----------|-----------------|
| Totals: | | | | | | | \$150.00 | \$150.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$150.00 | \$150.00 | Balance Due |
| 99203 | | | | | 1.00 | 1 0 0 0 | 150.00 | \$150.00 | \$150.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$150.00 | Balance Due |

+ Add Line Item X Delete Selected Validate Claim Reparse ERA Claim Info **Verify & Save**

- Select the check date, and posted date, and enter the check# if you have one. Entering the check number here will be helpful if any research is needed for the payment in the future.
- In addition, you can scan and upload a copy of the check and add it to the account so that if an image of the payment is needed in the future, it can be accessed easily. See this help desk article for information on how to scan and attach EOBs to your account ([link](#)).
- From the reason code drop-down, select **Insurance payment** and enter the payment in the **Ins 1 paid** field.

| Code/Check Date | Description | Mods/Posted Date | Service Date | EPSDT | Qty/Min | Dx Pointers | Price | Billed | Allowed | Adjmt | Ins 1 paid | Ins 2 paid | Pt Paid | Ins Bal | Pt Bal | Status/Adj Type |
|-----------------|-------------|------------------|--------------|-------|---------|-------------|----------|----------|----------|--------|------------------|------------|---------|----------|------------|-----------------|
| Totals: | | | | | | | \$150.00 | \$150.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$150.00 | \$150.00 | Balance Due |
| 99203 | | | | | 1.00 | 1 0 0 0 | 150.00 | \$150.00 | \$150.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$150.00 | Balance Due |
| MM/DD/YYYY | MM/DD/YYYY | Check # | | | | | | | | | Insurance Paymte | 0 | 0 | [1] TBD | 0: Settled | |

+ Add Line Item X Delete Selected Validate Claim Reparse ERA Claim Info **Verify & Save**

- From the insurance drop-down, select **[2] HRA** (or **[3]** if in the tertiary insurance field)
- Press **Verify and Save**.

Option 2 - Post as a patient payment

Now, we will see how to post HRA payment as a patient payment.

- Navigate to **Billing > Patient Payments**
- Select the **Payments** tab and enter the patient name in the respective field and press **Update**.

Patient Payments Payments Line Items Logs Statements Balance

donald duck

Donald Duck
94/04/1980

Filter by Range: \$ - \$ Provider: All

Simple: On Condensed: On Internal: Off

Update

- Select the patient and their patient payment tab will open. It will display all payments received, along with any unallocated money the patient has on their account.

Patient Payments | Payments | Line Items | Logs | Statements | Balance

From: To: Filter by Range: \$ - \$ Provider: All

Simple: On Condensed: On Internal: Off Update

| Total Paid | Allocated Payment (Paid to Appt) | Unallocated Payment | Statement Balance | Total Balance |
|------------|----------------------------------|---------------------|-------------------|---------------|
| \$25.00 | \$0.00 | \$25.00 | \$0.00 | -\$25.00 |

Print/Export + Add Auto Fill

| # | Unallocated | Posted Date | Payment Date | Appointment | Line Item | Provider | Payment Method | Type | Notes | Amount | Total |
|---|--------------------------|-------------|--------------|--------------|-----------|----------|----------------|--------|-------|---------|-------|
| 0 | <input type="checkbox"/> | \$25.00 | Oct 20, 2020 | Oct 20, 2020 | | | Cash | Credit | | \$25.00 | |

Legend: ● Unallocated ● Fully Allocated

4. To add a payment, press the green + Add button

Patient Payments | Payments | Line Items | Logs | Statements | Balance

From: To: Filter by Range: \$ - \$ Provider: All

Simple: On Condensed: On Internal: Off Update

| Total Paid | Allocated Payment (Paid to Appt) | Unallocated Payment | Statement Balance | Total Balance |
|------------|----------------------------------|---------------------|-------------------|---------------|
| \$25.00 | \$0.00 | \$25.00 | \$0.00 | -\$25.00 |

Print/Export + Add Auto Fill

| # | Unallocated | Posted Date | Payment Date | Appointment | Line Item | Provider | Payment Method | Type | Notes | Amount | Total |
|---|--------------------------|-------------|--------------|--------------|-----------|----------|----------------|--------|-------|---------|-------|
| 0 | <input type="checkbox"/> | \$25.00 | Oct 20, 2020 | Oct 20, 2020 | | | Cash | Credit | | \$25.00 | |

Legend: ● Unallocated ● Fully Allocated

5. A New Cash window will open so you can enter the payment details.

- a. **Payment Date** - The date you are posting the payment
- b. **Appointment** - You can use the drop-down to assign the payment to a specific appointment, or if you leave it blank the payment will be added to the patient's unallocated payment section to be used at a future time/future visit.
- c. **Line Item** - If you select a specific appointment to apply the payment, you can specify which line item (CPT/HCPCS/Custom Code) the payment should be applied to. Any charges on the specific appointment will show in the drop-down.
- d. **Provider** - this line designates the provider for the specific payment. It can be left blank if you prefer.
- e. **Payment Method** - this is to identify the type of payment (cash, check, etc)
- f. **Type** - this is to specify the type of payment.
 - i. Credit - a payment on the account
 - ii. Refund - an amount is being refunded to the patient
 - iii. Correction - used to correct a previous posting error
 - iv. Copay/Coinsurance - used to identify the payment as a copay/coinsurance

- v. Other - used for situations not specifically mentioned above
- vi. **Notes** - This section is used to document check/money order numbers or any other details about the payment that could be useful later. The information listed here can come in handy if any research is needed in the future regarding the payment.
- vii. Amount - amount of the patient's payment
- viii. Receipt - select whether to send the patient an email or text receipt

New Cash [Close]

Payment Date: MM/DD/YYYY

Appointment: [Dropdown]

Line Item: -No Line Item- [Dropdown]

Provider: [Dropdown]

Payment Method: - Select Type - [Dropdown]

Type: Credit [Dropdown]

Notes: [Text Area]

Amount: \$ [Text Field]

Receipt

Email Receipt ☐

Text Receipt ☐

[Cancel] [Add]

6. Enter the payment details and press **Add**.
7. The payment will now be visible on the patient's account. If it is not applied to a specific appointment, it will show as an **unallocated payment**.

Patient Payments | Payments | Line Items | Logs | Statements | Balance

Patient: [Dropdown]

From: [Text] To: [Text] Filter by Range: \$ [Text] - \$ [Text] Provider: All [Dropdown]

Simple: On Condensed: On Internal: Off [Update]

| Total Paid | Allocated Payment (Paid to Appt) | Unallocated Payment | Statement Balance | Total Balance |
|------------|----------------------------------|---------------------|-------------------|---------------|
| \$490.00 | \$290.00 | \$200.00 | \$100.00 | -\$115.00 |

Print/Export [Add]

| # | Unallocated | Posted Date | Payment Date | Appointment | Line Item | Provider | Payment Method | Type | Notes | Amount | Total | |
|----|--------------------------|-------------|--------------|--------------|--------------------|----------|----------------|--------|-------|----------|-------|-----------|
| 0 | <input type="checkbox"/> | \$50.00 | May 9, 2023 | May 9, 2023 | 4/19/2022 12:00AM | | Cash | Credit | | \$50.00 | | [Receipt] |
| 2 | <input type="checkbox"/> | \$0.00 | Dec 18, 2020 | Dec 18, 2020 | | | Cash | Credit | | \$170.00 | | [Receipt] |
| 12 | <input type="checkbox"/> | \$5.00 | Dec 18, 2020 | Dec 18, 2020 | 11/19/2020 11:00AM | | Cash | Credit | | \$20.00 | | [Receipt] |
| 1 | <input type="checkbox"/> | \$0.00 | Oct 21, 2020 | Oct 21, 2020 | | | Cash | Credit | | \$75.00 | | [Receipt] |
| 4 | <input type="checkbox"/> | \$125.00 | Oct 21, 2020 | Oct 21, 2020 | | | Cash | Credit | | \$150.00 | | [Receipt] |
| 4 | <input type="checkbox"/> | \$20.00 | Oct 21, 2020 | Oct 21, 2020 | | | Cash | Credit | | \$25.00 | | [Receipt] |

Legend: [Red Circle] Unallocated | [Gray Circle] Fully Allocated

8. You can also use the red/gray bubbles as a visual to see if a patient's payment is unallocated or fully allocated. The black arrow just to the left of the red/gray bubble will expand and show you additional details regarding how the payment was applied. This is especially useful when the payment has been applied to multiple appointments.

Patient Payments | Payments | Line Items | Logs | Statements | Balance

Patient: [Dropdown]

From: [Text] To: [Text] Filter by Range: \$ [Text] - \$ [Text] Provider: All [Dropdown]

Simple: On Condensed: On Internal: Off [Update]

| Total Paid | Allocated Payment (Paid to Appt) | Unallocated Payment | Statement Balance | Total Balance |
|------------|----------------------------------|---------------------|-------------------|---------------|
| \$490.00 | \$290.00 | \$200.00 | \$100.00 | -\$115.00 |

Print/Export [Add]

| # | Unallocated | Posted Date | Payment Date | Appointment | Line Item | Provider | Payment Method | Type | Notes | Amount | Total | |
|----|--------------------------|-------------|--------------|--------------|--------------------|----------|----------------|--------|-------|----------|-------|-----------|
| 0 | <input type="checkbox"/> | \$50.00 | May 9, 2023 | May 9, 2023 | 4/19/2022 12:00AM | | Cash | Credit | | \$50.00 | | [Receipt] |
| 2 | <input type="checkbox"/> | \$0.00 | Dec 18, 2020 | Dec 18, 2020 | | | Cash | Credit | | \$170.00 | | [Receipt] |
| 12 | <input type="checkbox"/> | \$5.00 | Dec 18, 2020 | Dec 18, 2020 | 11/19/2020 11:00AM | | Cash | Credit | | \$20.00 | | [Receipt] |
| 1 | <input type="checkbox"/> | \$0.00 | Oct 21, 2020 | Oct 21, 2020 | | | Cash | Credit | | \$75.00 | | [Receipt] |
| 4 | <input type="checkbox"/> | \$125.00 | Oct 21, 2020 | Oct 21, 2020 | | | Cash | Credit | | \$150.00 | | [Receipt] |
| 4 | <input type="checkbox"/> | \$20.00 | Oct 21, 2020 | Oct 21, 2020 | | | Cash | Credit | | \$25.00 | | [Receipt] |

Legend: [Red Circle] Unallocated | [Gray Circle] Fully Allocated

9. To move money from Unallocated Payment and associate it with an appointment, press the circle over on the right, sometimes referred to as a radio button.

Print/Export [Add]

| # | Unallocated | Posted Date | Payment Date | Appointment | Line Item | Provider | Payment Method | Type | Notes | Amount | Total | |
|---|--------------------------|-------------|--------------|--------------|-----------|----------|----------------|--------|-------|---------|-------|-------------------|
| 0 | <input type="checkbox"/> | \$25.00 | Oct 20, 2020 | Oct 20, 2020 | | | Cash | Credit | | \$25.00 | | [Radio] [Receipt] |

Legend: [Red Circle] Unallocated | [Gray Circle] Fully Allocated

10. A **Move Cash** window will open. This will allow you to select the appointment, the line item, and the amount to transfer.

Move Cash

Appointment

4/19/2022 12:00AM (\$0.00 -

Line Item

-No Line Item-

Amount

\$ 50

out of \$50.00

Extra Notes

Payment Type

Credit

Move

Cancel

11. Once all fields are filled in, press **Move**, and the system will move the cash as you have requested.
