

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 shows the patient demographics page for a patient named 'sample sample'. The patient is female, 3 years, 1 month old, with a date of birth of 04/01/2022. The page includes fields for Provider (Cathy Consultant), Address (123 Main Street, Annapolis, MD 21403), Phone ([515] 555-5151), Email (email@gmail.com), OnPatient status (Not Enabled-Invite), Date Added (04/14/2022), Prev Appt (10/01/2024), and Next Appt (None). There are also buttons for 'Patient must have documented medications' and 'Patient must have documented allergies'. The 'Demographics' section is active, and the 'Insurances' tab is selected. Under the 'Insurances' tab, the 'Secondary Ins' option is selected. The 'Secondary Insurance' section is expanded, showing a checkbox for 'Subscriber is the Patient' (checked) and 'Insured person is the same person as the Patient'. The 'Insurance Company' field is set to 'HRA'. There are also fields for 'Carrier Payer ID' and 'Alternate Eligibility Payer'. A red arrow points to the 'Insurances' tab, and another red arrow points to the 'Secondary Ins' option. A third red arrow points to the 'HRA' text in the 'Insurance Company' 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
1	M54.14	Radiculopathy, thoracic region		Add NDC code	1	UN (Unit)
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	EPSTD	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	\$0.00	\$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 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	EPSTD	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	\$0.00	\$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
											0	0	[1] TBD	0: Settled		

+ Add Line Item 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
04/04/1980

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 [v]

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 [v] + 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	

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 [v]

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 [v] + 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	

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/HPCPS/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: \$ [Input]

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	
2	<input type="checkbox"/>	\$0.00	Dec 18, 2020	Dec 18, 2020			Cash	Credit		\$170.00	
12	<input type="checkbox"/>	\$5.00	Dec 18, 2020	Dec 18, 2020	11/19/2020 11:00AM		Cash	Credit		\$20.00	
1	<input type="checkbox"/>	\$0.00	Oct 21, 2020	Oct 21, 2020			Cash	Credit		\$75.00	
4	<input type="checkbox"/>	\$125.00	Oct 21, 2020	Oct 21, 2020			Cash	Credit		\$150.00	
4	<input type="checkbox"/>	\$20.00	Oct 21, 2020	Oct 21, 2020			Cash	Credit		\$25.00	

Legend: [Red bubble] Unallocated | [Gray bubble] 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	
2	<input type="checkbox"/>	\$0.00	Dec 18, 2020	Dec 18, 2020			Cash	Credit		\$170.00	
12	<input type="checkbox"/>	\$5.00	Dec 18, 2020	Dec 18, 2020	11/19/2020 11:00AM		Cash	Credit		\$20.00	
1	<input type="checkbox"/>	\$0.00	Oct 21, 2020	Oct 21, 2020			Cash	Credit		\$75.00	
4	<input type="checkbox"/>	\$125.00	Oct 21, 2020	Oct 21, 2020			Cash	Credit		\$150.00	
4	<input type="checkbox"/>	\$20.00	Oct 21, 2020	Oct 21, 2020			Cash	Credit		\$25.00	

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

9. To move money from Unallocated Payment and associate it with an appointment, press the circle 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	

Legend: [Red bubble] Unallocated | [Gray bubble] 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

Line Item

Amount

Extra Notes

Payment Type

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