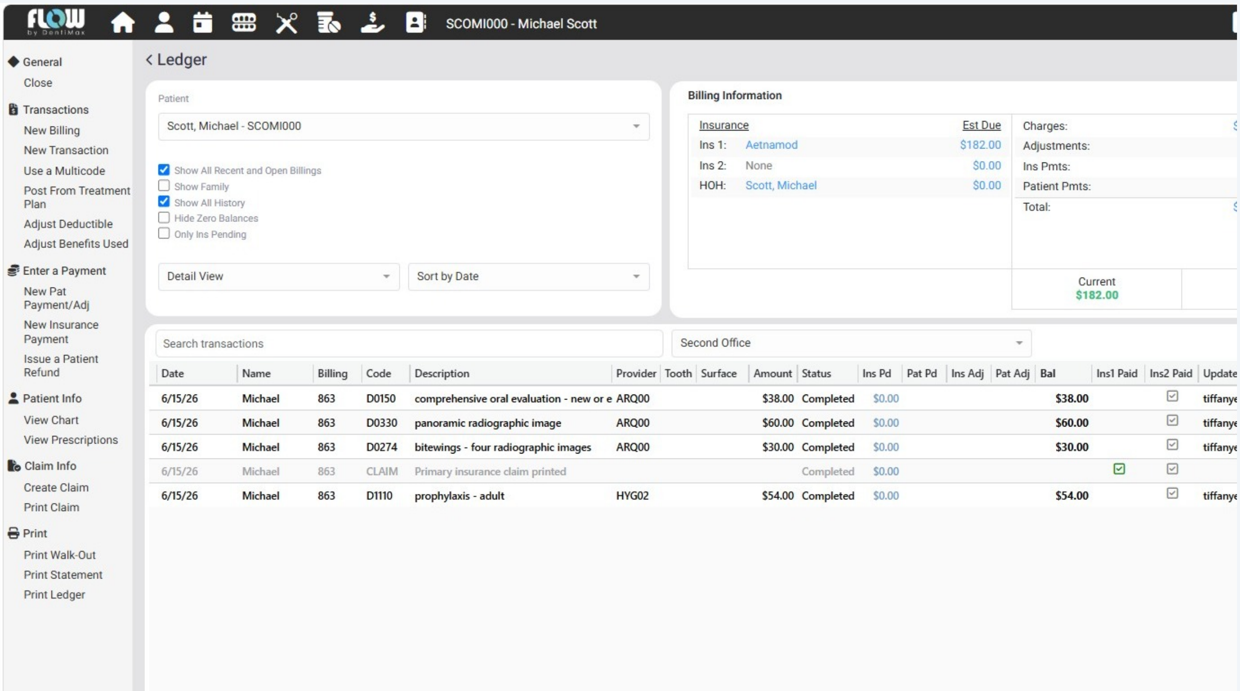
How to Process and Distribute Insurance Payments

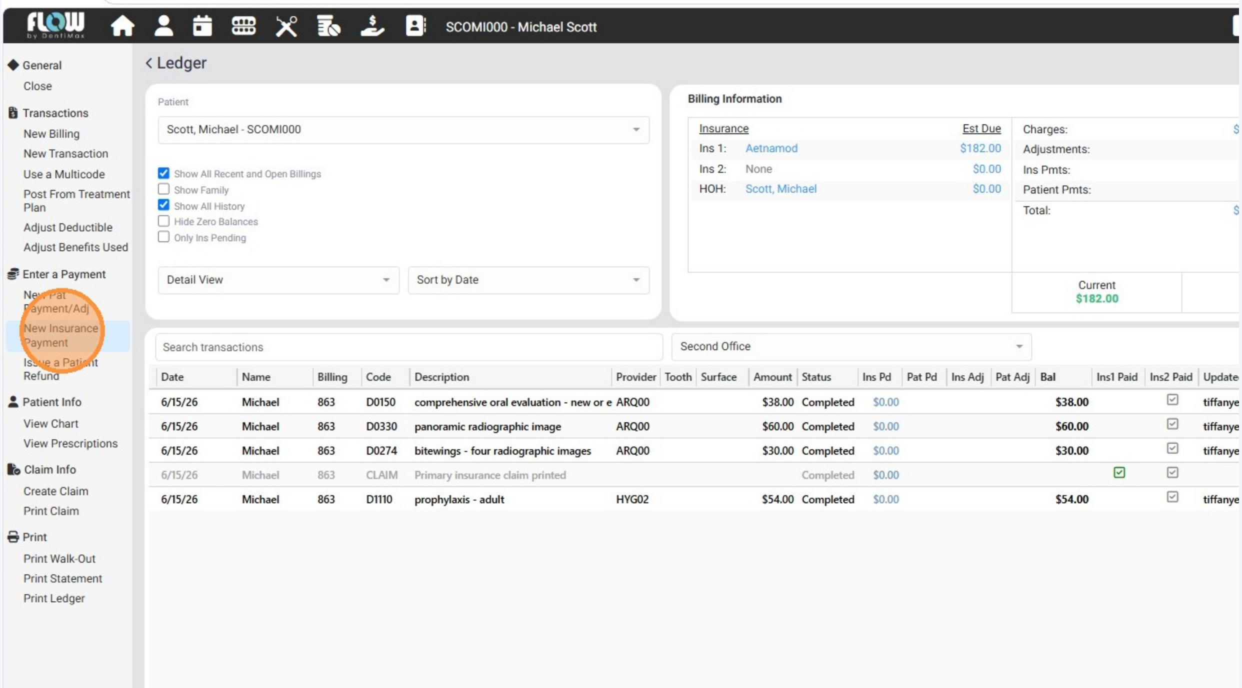
Learn the efficient workflow for recording and distributing insurance payments within your ledger system. This guide ensures accurate account reconciliation and proper handling of payment entries.

Ledger Access

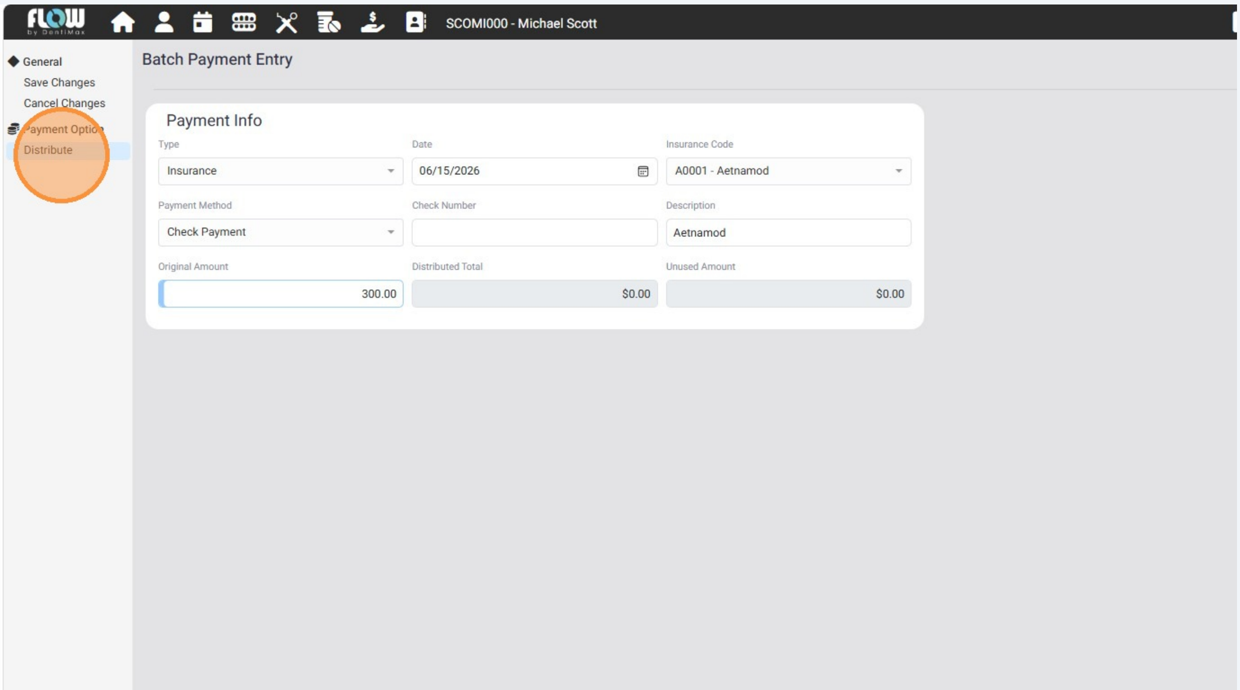
1 Viewing patient ledger: Procedures have been posted and claim has been sent to the proper insurance.



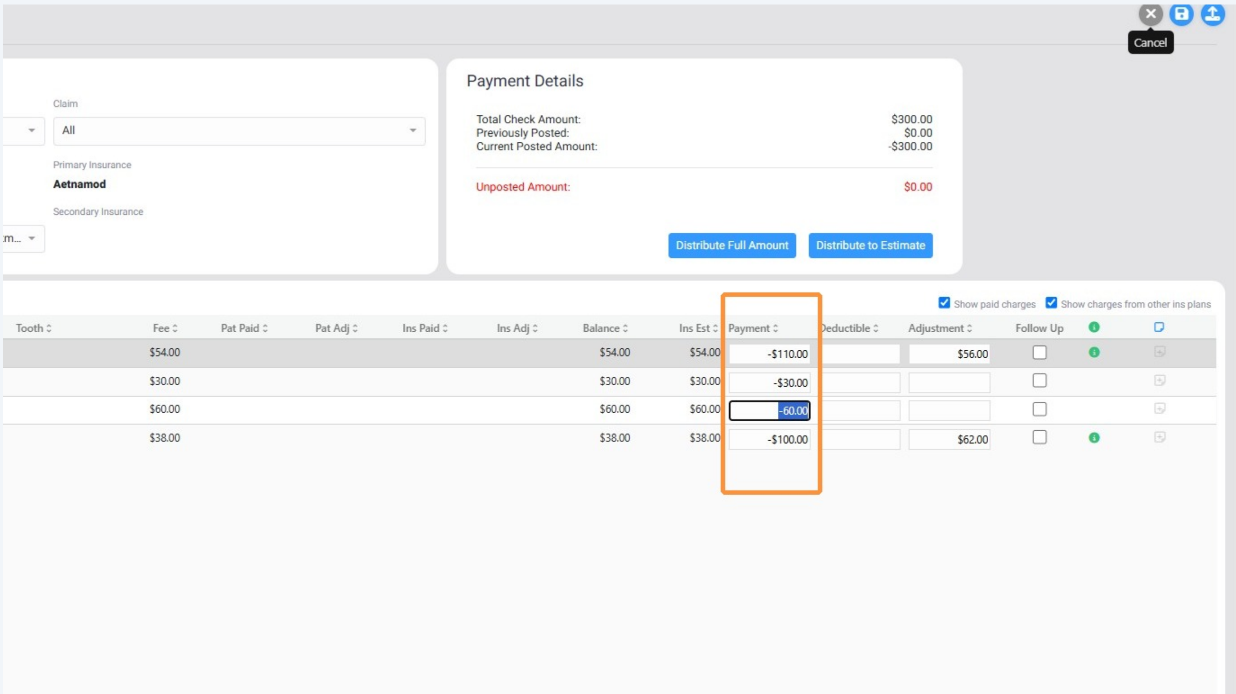
2 Once the payment is received: Select "New Insurance Payment"



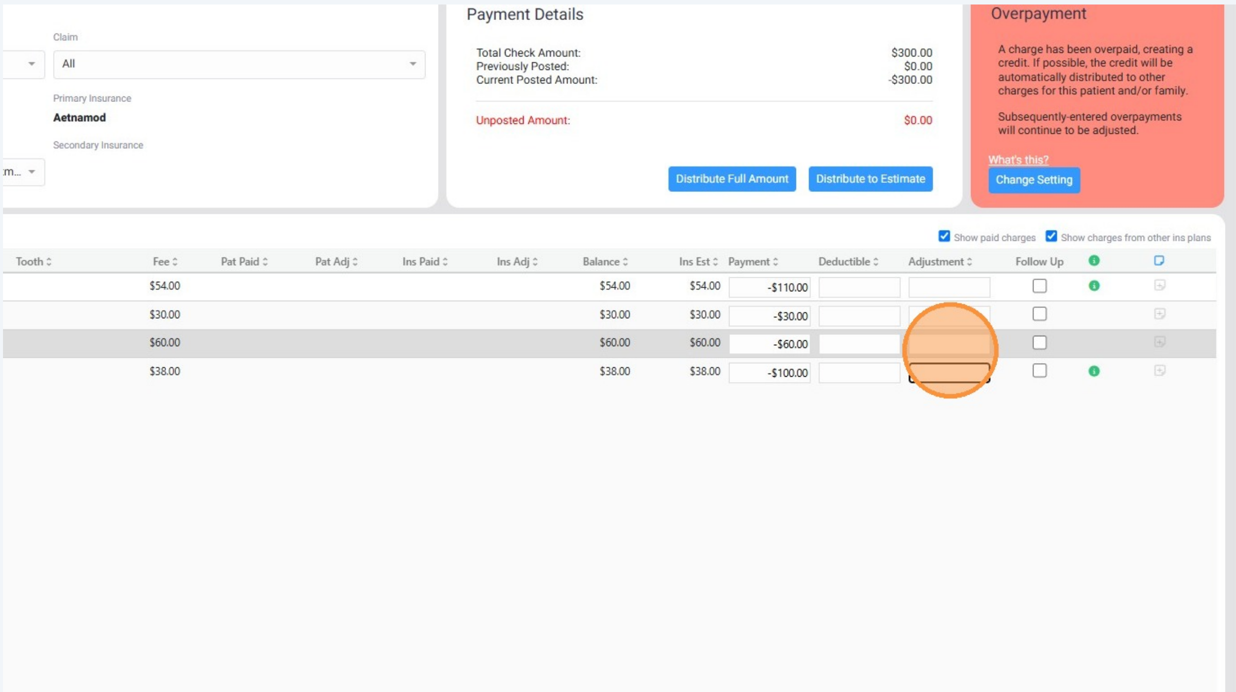
3 Enter payment details: Payment method, Check number, Original Amount. Click "Distribute"



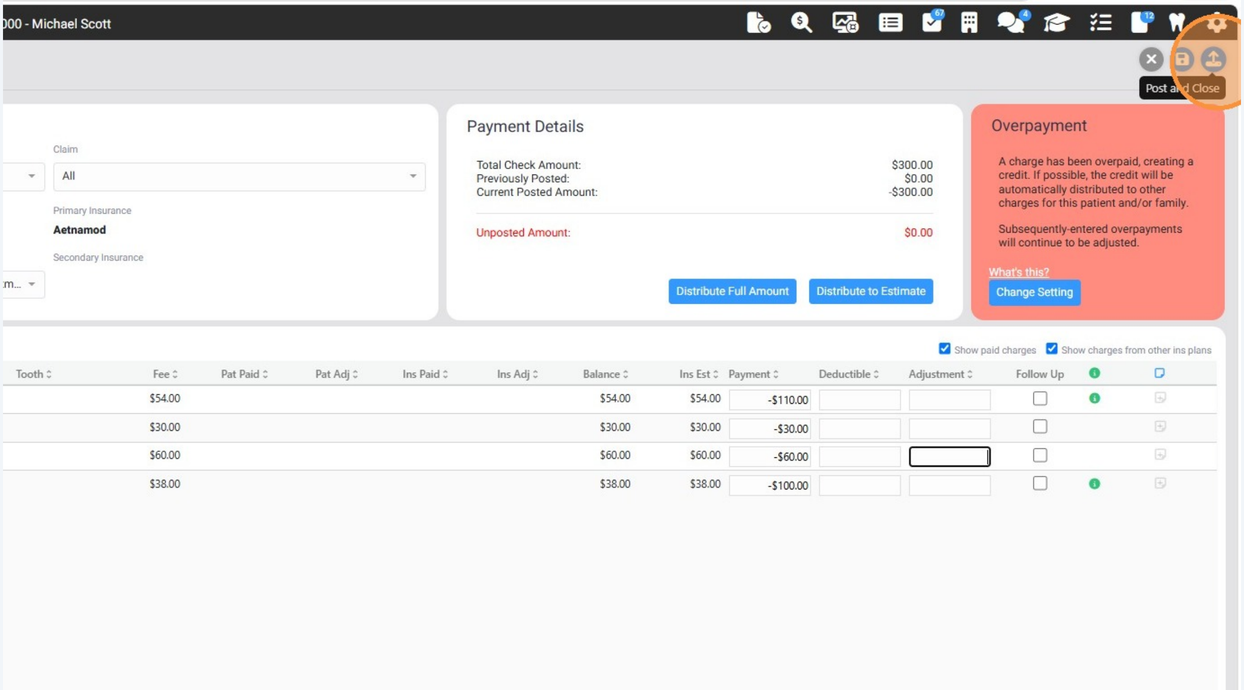
4 Apply the payment to the correct procedures as notes on the EOB



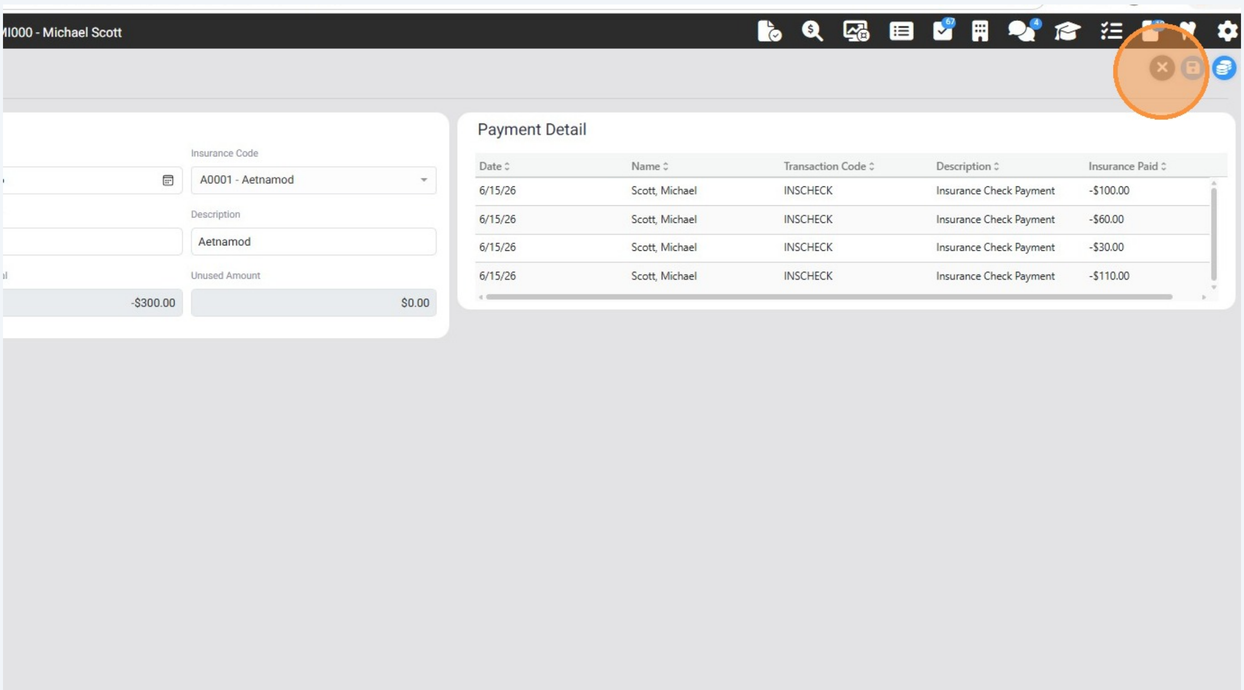
5 Remove any auto Adjustments that may have applied if they are not applicable. Click in the Adjustment field and delete



6 Click "Post and Close"



7 Verify full insurance payment has been distributed to correct ledger/procedures. Close Batch Payment Entry window



8 Now you will see a credit on the procedures that were overpaid; leaving a credit on patients account.