

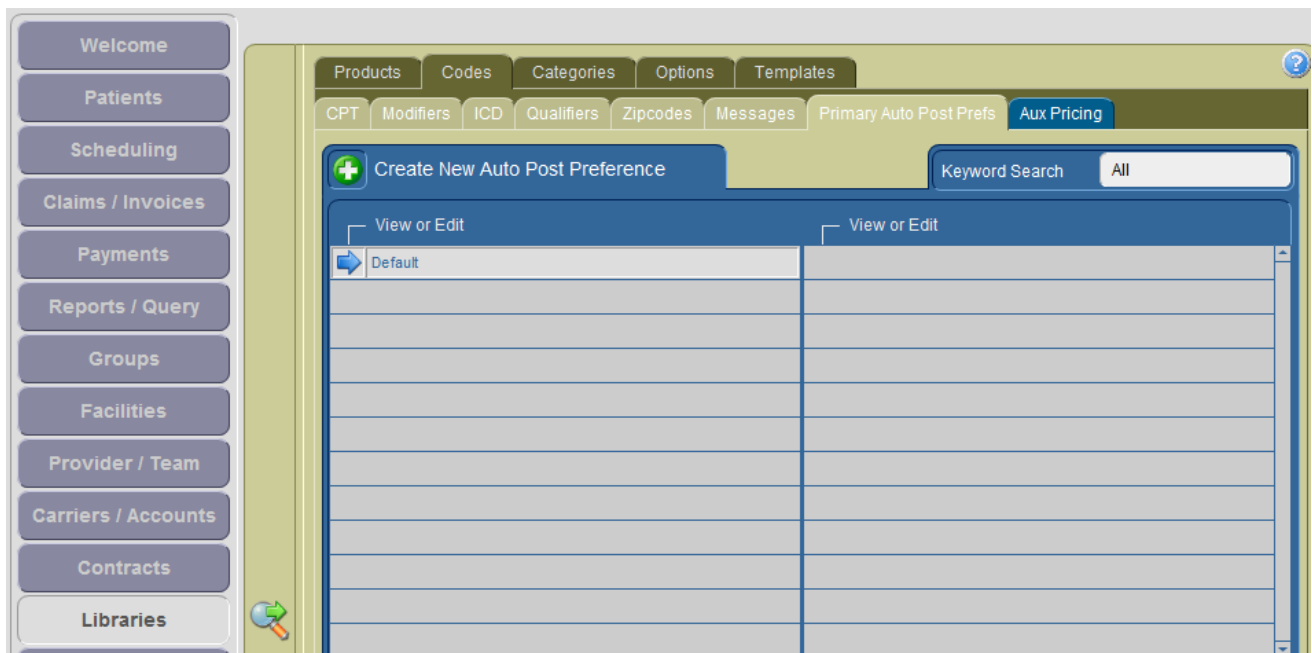
Auto Post Payment Preferences



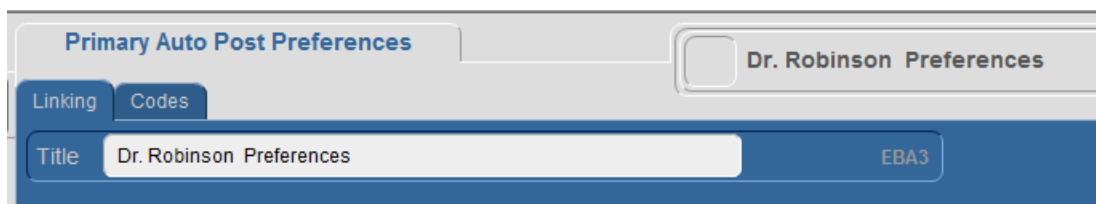
Auto Post Payments Preferences

Auto Post preferences can be used when you want to setup specific auto posting preferences for your primary carriers outside of the recommended requests that the carries is sending with the ERA file.

Go to the **Library** menu, select the **Codes** tab and then into the **Primary Auto Post Prefs** tab.



- Click on the blue arrow next to an existing Auto Post Preference to view or edit it.
- To create a new Auto Post Preference, click the green plus icons labeled “**Create New Auto Post Preference**”.
- Create a custom title, something that you will remember that is specific to the carriers, the group, or the providers.



Auto Post Payment Preferences

- On the **Carriers** tab, choose the insurance company or companies to which you will apply these preferences.
 - You can do a Keyword search, or click the All button to find the insurance companies to be attached.
 - Click on the insurance company in the left side of the screen to select it and move it over to the right side of the screen.

The screenshot shows the 'Primary Auto Post Preferences' window. The 'Carriers' tab is active. The 'Keywords' field contains 'A'. The 'Carriers' list on the right includes 'North American Benefits' with address 'P.O. Box 89476, Cleveland, OH 44101-6476'. The 'Groups' list on the left includes 'North American Benefits', 'Cleveland, OH 44101-6476', 'Tricare Healthcare Alliance', and 'Phoenix, AZ 85080-2178'.

- On the **Groups** tab, there must be at least one group attached.

The screenshot shows the 'Primary Auto Post Preferences' window. The 'Groups' tab is active. The 'Title' field contains 'Dr. Robinson Preferences'. The 'Groups Attached' list includes 'Bellevue Pathology Lab ~ BP' (unchecked) and 'Medical Clinic of New Mexico ~ MC' (checked).

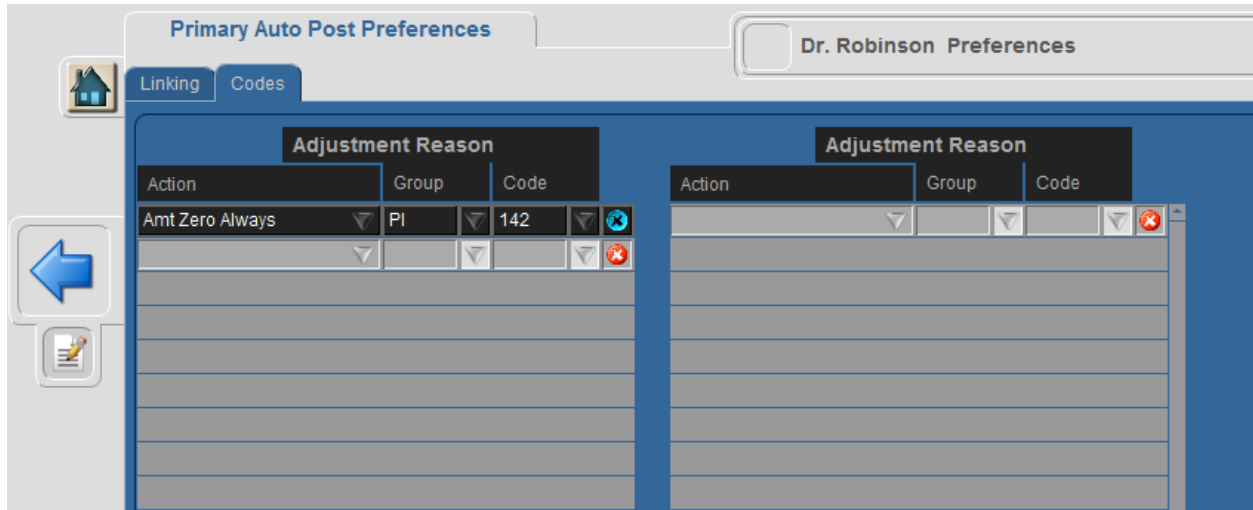
- On the **Providers** tab, search for the providers to be attached. Then, click on each provider to attach.

Auto Post Payment Preferences

The screenshot displays the 'Primary Auto Post Preferences' window for 'Dr. Robinson Preferences'. The 'Codes' tab is active, showing a list of codes on the left and a search field on the right. The search field contains 'Robinson, Jack, MD'. The list of codes includes 'ACME Emergency Organ Removal', 'Blackwell, Jackie', 'Bowden, Kathy', 'Doe, John', 'Grissom, Gill, M.D.', 'Istrator, Admin', 'Klein, Matt', 'Maulder, Kevin L, MD', 'McCoy, Leonard, M.D.', 'Obrien, Sharon, PT', and 'Robinson, Jack, MD'. The 'Keywords' section shows 'All' selected. The 'Title' field contains 'Dr. Robinson Preferences' and 'EBA3'. The 'Groups', 'Carriers', and 'Providers' tabs are visible at the top right.

- Go to the **Codes** tab to select an action. Click on the drop down menu for the “Action”. The default is to Execute Request Always, which will implement always what the carrier recommends.
- If you select “Hold Req Always”, the transaction will become an HT transaction. When you click on the transaction, you will be able to see what the carrier had recommended and decide if you want to implement it or not.
- You can select Amt Zero Always, which means that it will bring in an adjustment, but the adjustment amount will be zero.
- Click the drop down to choose the claim “Adjustment Reason Group”.
- Click the drop down to choose the claim “Adjustment Reason Code”.
- There can be more than one specific to the groups, the providers and the insurance carriers. Continue entering them until you’re finished.
- Click the Back Arrow to return to the menu.

Auto Post Payment Preferences



In order to send your secondary claims, you must implement what is recommended by the primary insurance carrier in order to send that claim to the secondary carrier.