

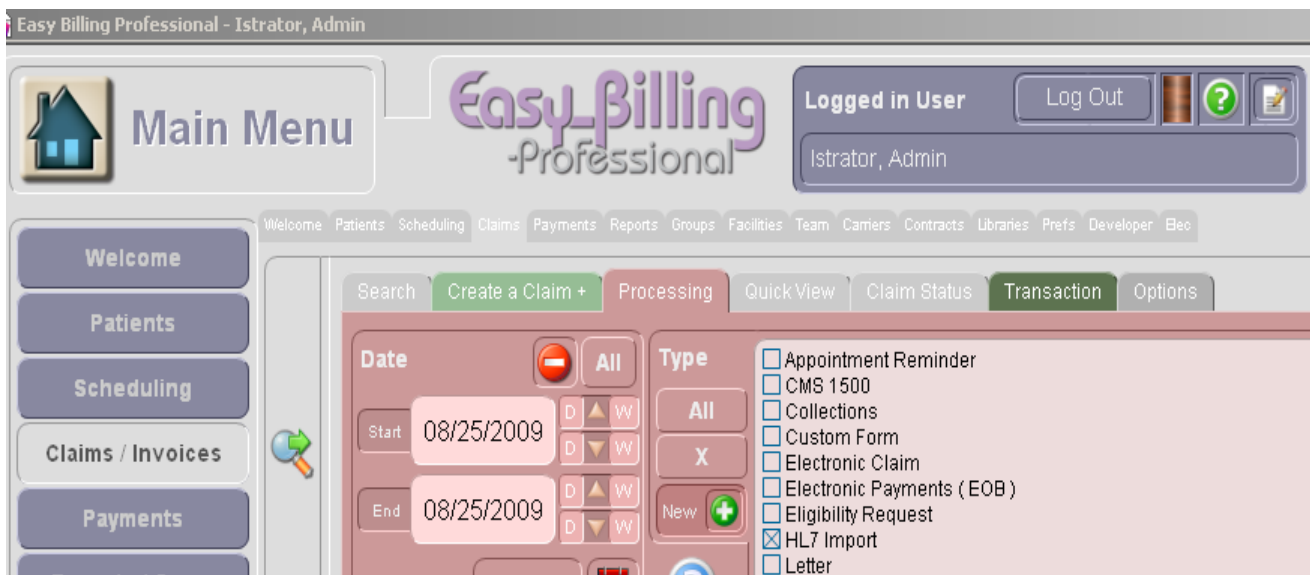
EB Pro Electronic ERA Auto Payments



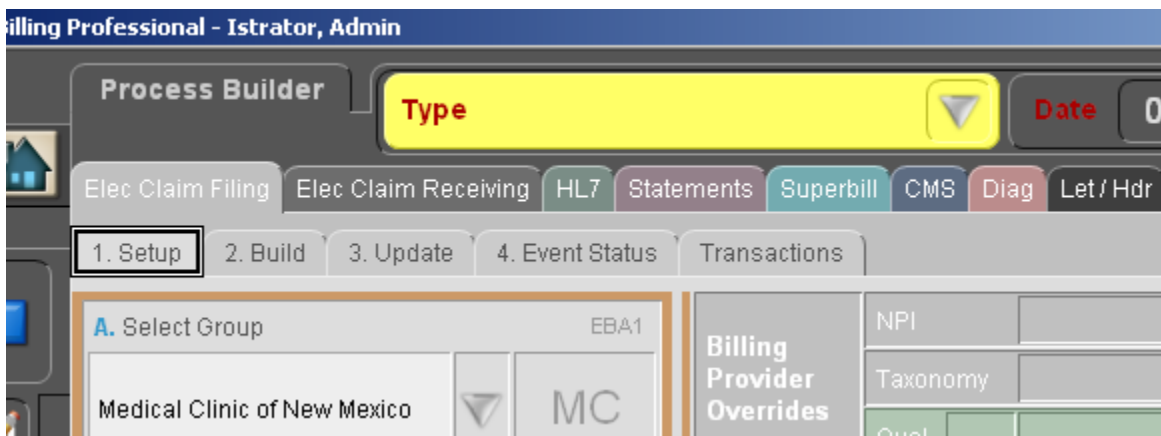
Electronic ERA Auto Payments –

ERA files are auto electronic payments from the clearing house.

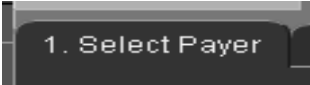
- Go to the **Claims/Invoices** menu and select the **Processing** tab.

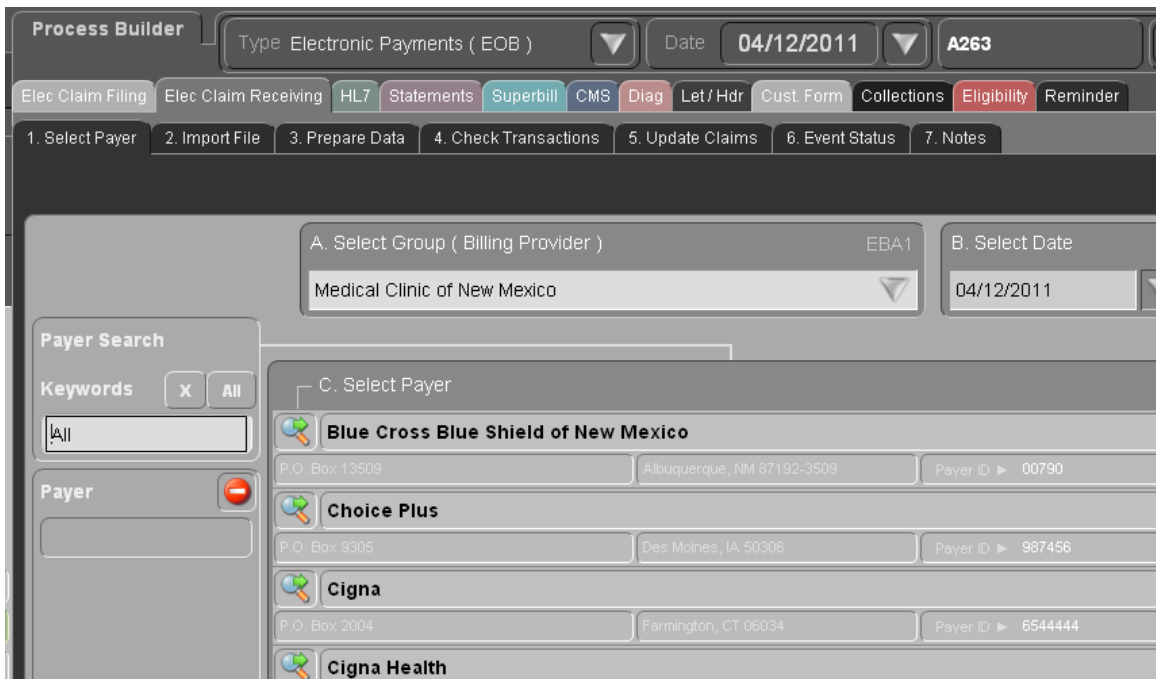


- Click on the green plus sign labeled 'New' to create a new process event.
 - "Type" = "Electronic Payments"

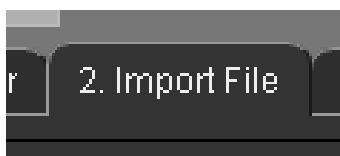


EB Pro Electronic ERA Auto Payments

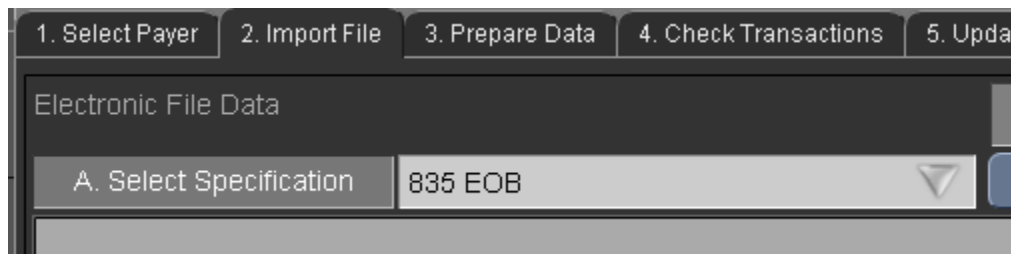
- On the **1. Select Payer** tab  choose an Insurance Carrier.
 - a. Search for a Carrier.
 - b. Only one ERA for one group at a time.



- Select **2. Import File** tab.

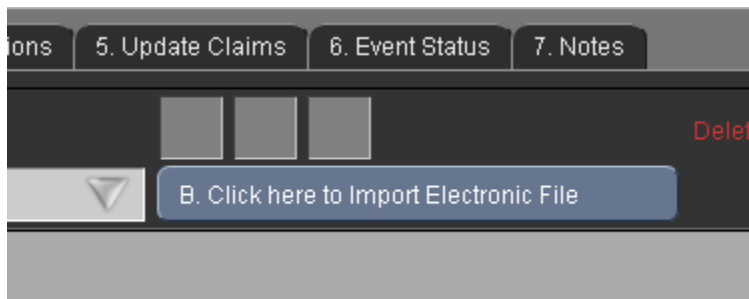


- a. Select "835 EOB" from the drop down list in the "A. Select Specification" field.

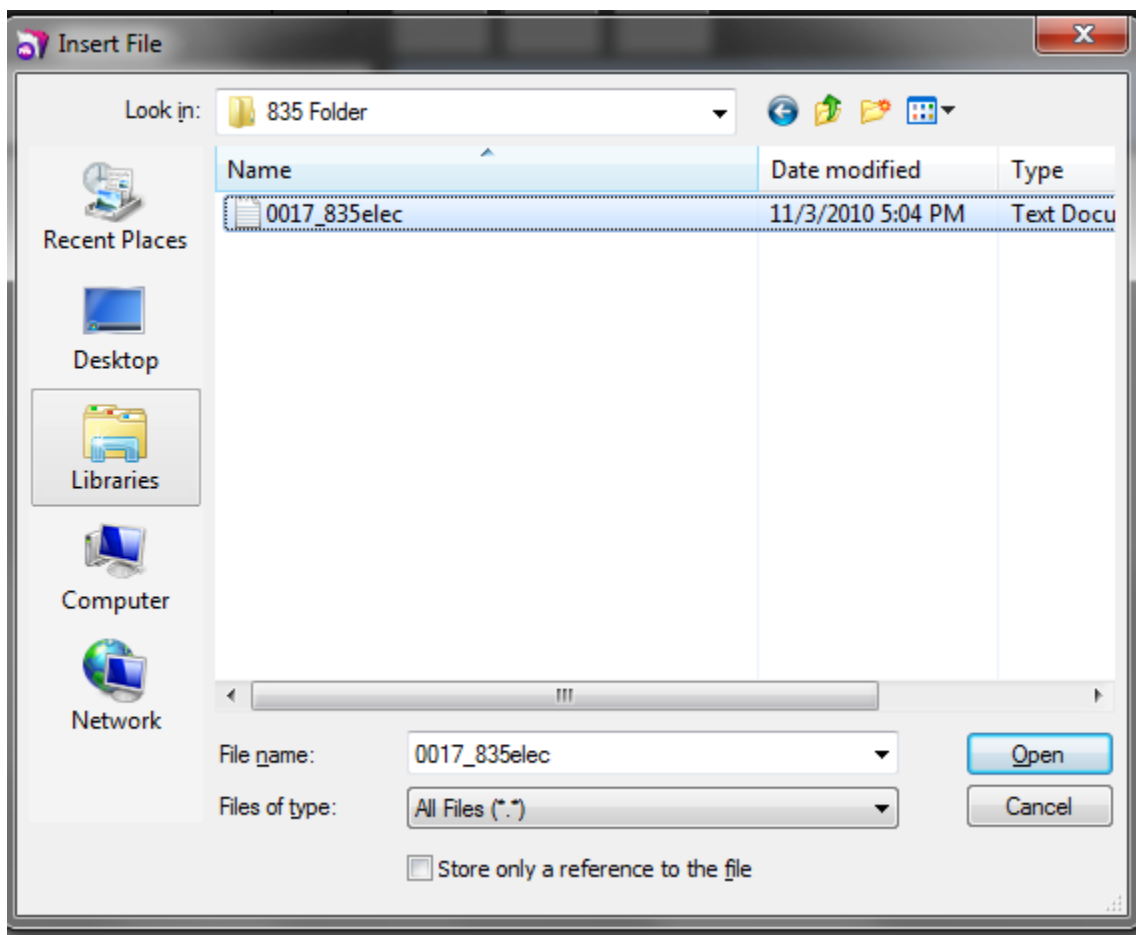


EB Pro Electronic ERA Auto Payments

- b. Click the import button labeled “**B. Click here to Import Electronic File.**”



- c. Locate your file from the clearing house, select it and click **Open** to import the file.

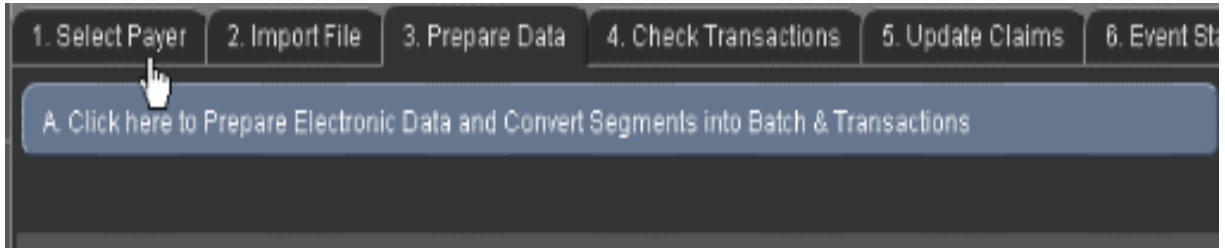


- Select the **3. Prepare Data** tab when the import has completed.

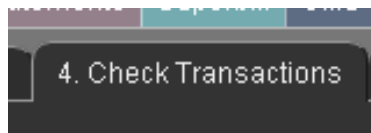


EB Pro Electronic ERA Auto Payments

- Click on “**A. Click Here to Prepare Electronic Data and Convert Segments into Batch and Transactions.**” This process will take a while, depending on file size.



- Select the **4. Check Transactions** tab. When finished processing, you will see the information for each claim.



Important Note: For billing software in transition, there may be Non EB claims in the ERA file. Review the Claim Numbers for Non EB claims. Subtract these amounts from the check total. Then carefully remove all Non EB Claims.

EB Pro Electronic ERA Auto Payments

1. Select Payer 2. Import File 3. Prepare Data 4. Check Transactions 5. Update Claims 6. Event Status 7. Notes													
Batch		07/14/2009		EBA117		\$ 410.00		Completion <input type="radio"/> Y <input checked="" type="radio"/> N <input type="radio"/> D			Delete ALL Transactions - <input checked="" type="radio"/>		
TR ID	TR Date	TR Code	Auto Post Action	Payment Type	Payment Amount	Applied Amount	Reason Cat. Code	Chg. CPT Code	Charge Amount	Origination Chg. Line ID	ID Claim	Delete this Transaction - <input checked="" type="radio"/>	
TRA1339	09/12/2009	PI	E	CHK1111111	410.00		✓ P						<input checked="" type="radio"/>
TRA1340	09/12/2009	PL	E	CHK1111111		90.00	✓ A	TRA7	135.00	99212	CLA6		<input checked="" type="radio"/>
TRA1341	09/12/2009	AL	E			20.00	✓ CO 45	TRA7	135.00	99212	CLA6	Go to this Claim	<input checked="" type="radio"/>
TRA1342	09/12/2009	PR	E			20.00	✓ PR 1	TRA7	135.00	99212	CLA6		<input checked="" type="radio"/>
TRA1343	09/12/2009	PL	E	CHK1111111		245.00	✓ A	TRA8	265.00	97014	CLA6		<input checked="" type="radio"/>
TRA1344	09/12/2009	AL	E			10.00	✓ CO 45	TRA8	265.00	97014	CLA6		<input checked="" type="radio"/>
TRA1345	09/12/2009	PR	E			10.00	✓ PR 1	TRA8	265.00	97014	CLA6		<input checked="" type="radio"/>
TRA1346	09/12/2009	PL	E	CHK1111111		75.00	✓ A	TRA9	125.00	99212	CLA7		<input checked="" type="radio"/>
TRA1347	09/12/2009	AL	E			30.00	✓ CO 45	TRA9	125.00	99212	CLA7		<input checked="" type="radio"/>
TRA1348	09/12/2009	PR	E			20.00	✓ PR 1	TRA9	125.00	99212	CLA7		<input checked="" type="radio"/>

- a. Claim numbers are shown on the right.
- b. Review the claim for Held Transactions, to process them.
- c. Automatic Adjustments and Co-pays are entered according to the setup in Preferences. You can:
 - i. Leave as recommended by the carrier (default),
 - ii. Hold for manual processing, or
 - iii. Process with a zero amount.

EB Pro Electronic ERA Auto Payments

Payment Amount	Applied Amount	Reason Cat. Code	Original Chg. Li
410.00		✓ P	
	90.00	✓ A	TRA7
	20.00	✓ CO 45	TRA7
	20.00	✓ PR 1	TRA7
	245.00	✓ A	TRA8
	10.00	✓ CO 45	TRA8

d. The check amount is shown at the top.

Report File		3. Prepare Data	4. Check Transactions	5. Up
4/2009	EBA117		\$ 410.00	Com
Code	Auto Post Action	Payment Type		
	Payment Chk / Ref #	Payment Amount	Applied Amount	
09	PI E	CHK1111111	410.00	1
09	PL E	CHK1111111		90.00 1
09	AL E			20.00 1 CO 45

e. PL indicates each payment amount applied with check number shown.

EB Pro Electronic ERA Auto Payments

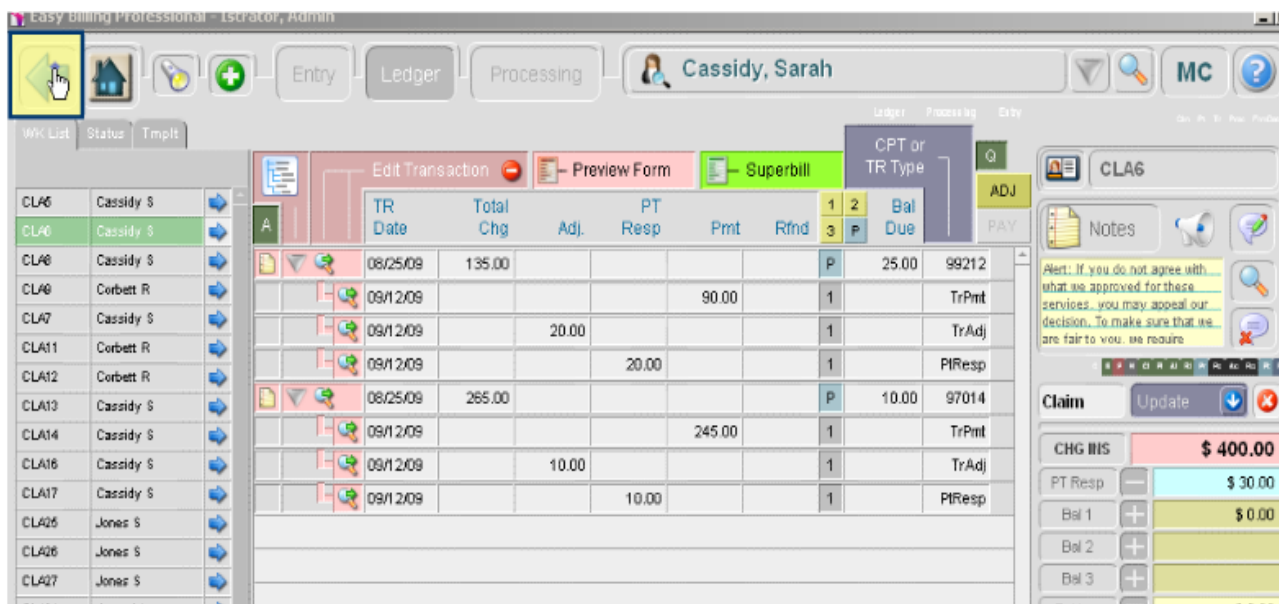
Date	TR Code	Auto Post Action	Payment Chk / Ref #	Payment Amount	Applied Amount	Payment Type	Reason	
9/12/2009	PI	E	CHK1111111	410.00		1		✓
9/12/2009	PL	E	CHK1111111		90.00	1		✓
9/12/2009	AL	E			20.00	1	CO 45	✓
9/12/2009	PR	E			20.00	1	PR 1	✓
9/12/2009	PL	E	CHK1111111		245.00	1		✓
9/12/2009	AL	E			10.00	1	CO 45	✓
9/12/2009	PR	E			10.00	1	PR 1	✓
9/12/2009	PL	E	CHK1111111		75.00	1		✓
9/12/2009	AL	E			30.00	1	CO 45	✓

f. Charge amount and CPT code are shown to the right.

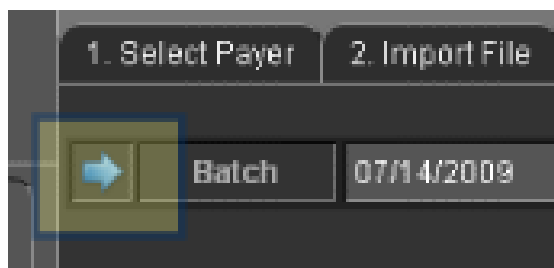
Session Cat.	Code	Chg. CPT Code	Charge Amount	ID Claim
✓	P			
✓	A	TR47	135.00 99212	CL46
✓		TR47	135.00 99212	CL46
✓		TR47	135.00 99212	CL46
✓	A	TR48	265.00 97014	CL46
✓		TR48	265.00 97014	CL46
✓		TR48	265.00 97014	CL46
✓	A	TR49	125.00 99212	CL47
✓		TR49	125.00 99212	CL47
✓		TR49	125.00 99212	CL47

g. Click the button on the claim to view that claim ledger. Click the blue Back Arrow to the left to return.

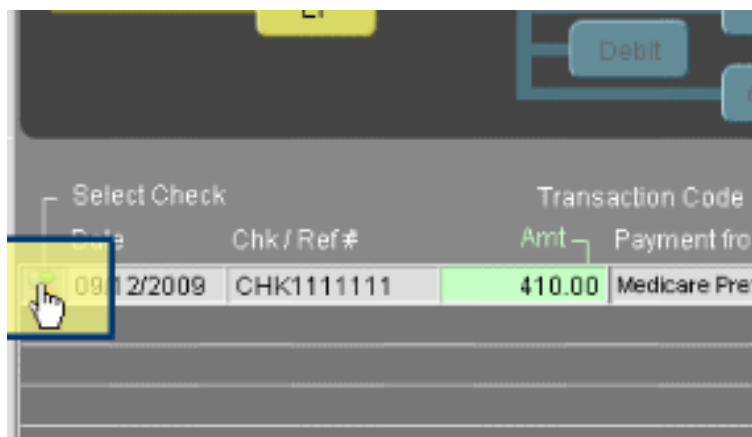
EB Pro Electronic ERA Auto Payments



- Clicking on the blue arrow next to “Batch” you can view the Batch and see the entire ERA payment post in the Batch screen.

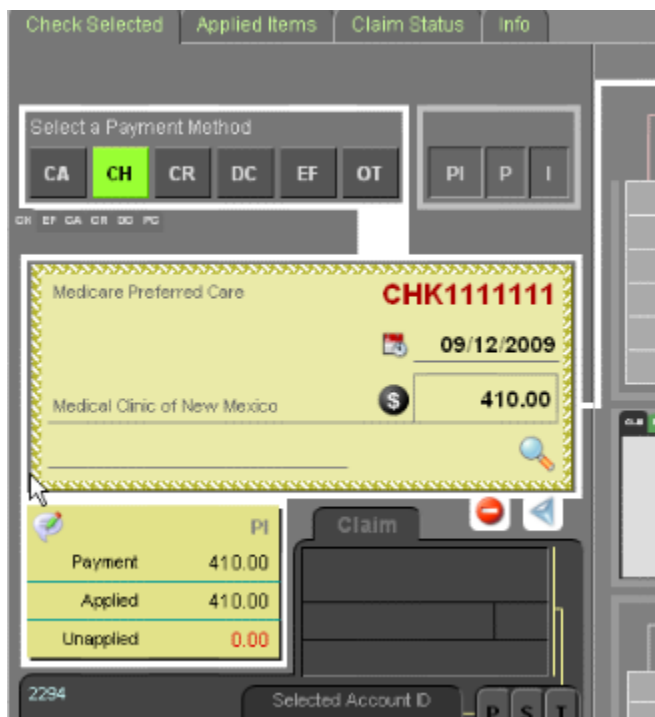


- a. The ERA that you have posted will be present. Click the icon in the “Select Check” column to go to this check.

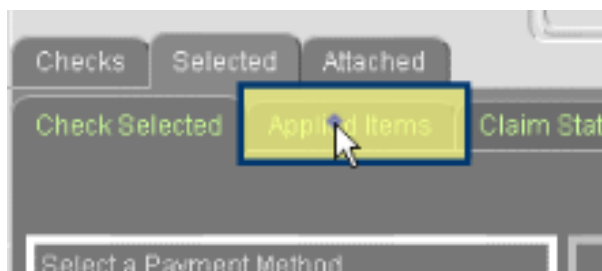


EB Pro Electronic ERA Auto Payments

Check number, date, amount, payer, group, applied and unapplied amounts are shown.



- b. Click the **Applied Items** tab to view the items that were applied for this check.



- c. Click the claim number in the **Applied Items** tab to view which transactions are associated with that claim in the lower right portion of the screen

EB Pro Electronic ERA Auto Payments

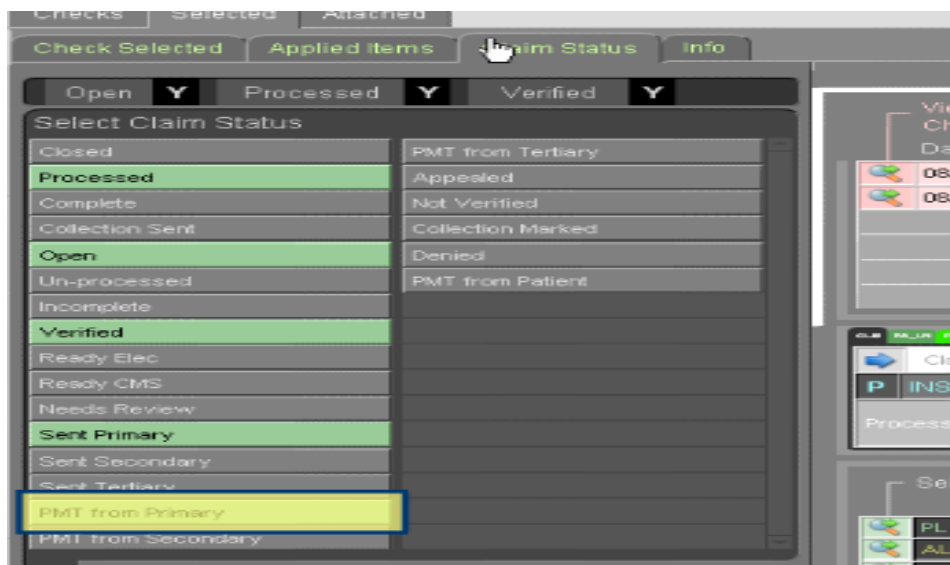
Delete Pmt		ORIG	TR Code	
Date	Claim #	Patient		Amt
09/12/09	CLA6	Cassidy, S. .	PL	90.00
09/12/09	CLA6	Cassidy, S. .	PL	245.00
09/12/09	CLA7	Cassidy, S. .	PL	75.00

Claim ID		Date	Cassidy, Sarah	
INS Status	ID			
P	2294	08/25/2009		
Processed Open Verified Sent Primary PMT from Primary				
Claim Balance		AI		35.00
		INS		0.00
		PT		35.00

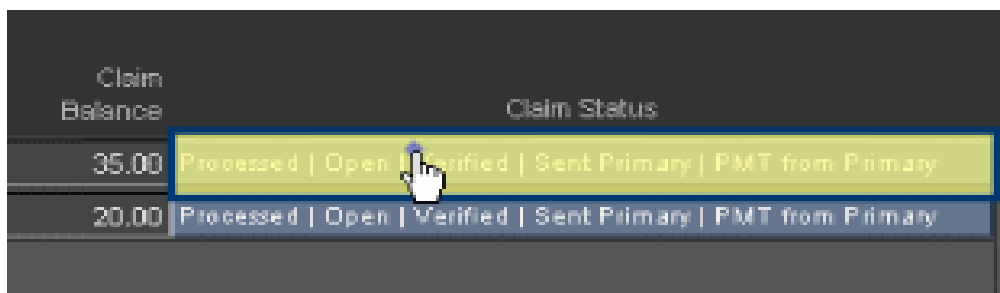
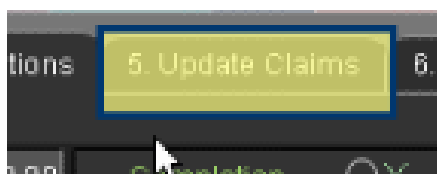
Select	Date	CPT	Chk / Ref #	Payment Type	Amount	Reason Codes	Pmt. Orig
PL	09/12/2009	99212	CHK1111111	1	90.00	A	✓
AL	09/12/2009	99212		1	20.00	CO 45	✓
PR	09/12/2009	99212		1	20.00	PR 1	✓
PL	09/12/2009	97014	CHK1111111	1	245.00	A	✓
AL	09/12/2009	97014		1	10.00	CO 45	✓
PR	09/12/2009	97014		1	10.00	PR 1	✓

- d. Click the **Claim Status** tab. The status has been updated by the ERA import to “PMT from Primary”

EB Pro Electronic ERA Auto Payments

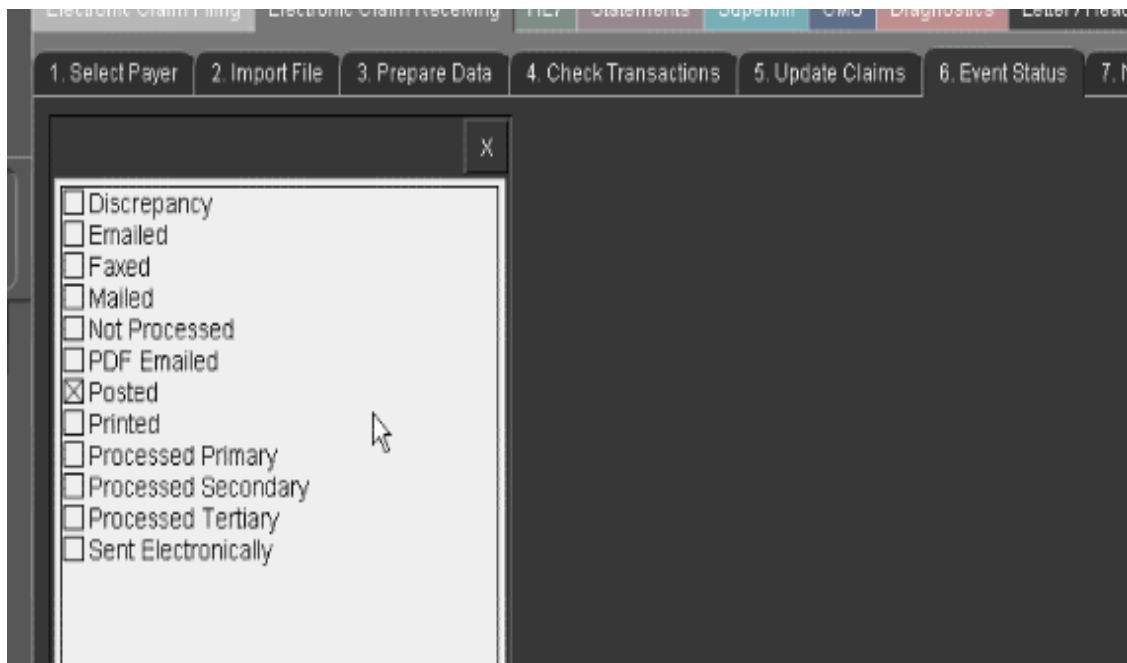


- Select the **5. Update Claims** tab. Click on “Claim Status” to update or change the statuses.



- Select the **6. Event Status** tab to update this processing event.

EB Pro Electronic ERA Auto Payments



You can return to any processing event by clicking on the **Processing** tab in the **Claims/Invoices** menu, do a search and click on the blue arrow next to the processing event.

