

Auto Posting 835 Remittances (ERAs)

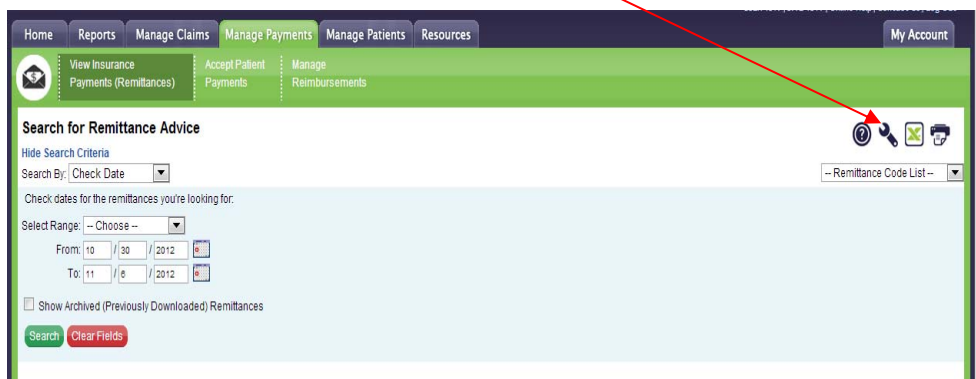
Before beginning to use the OT Auto-Posting feature there are a few things that need to be done:

- You must submit the 5010 version of the 837 claim files in order to process their payments. If you submitted the claim using the 4010 version you will not be able to process the payments using auto posting.
- The 835 remittance files (ERAs) need to be in 5010 format.
- You will need to contact your current Clearinghouse to see what settings may need to be set or changed to begin downloading remittances. Some payers may not have remittance files available.
- Create a folder for your 835 remits. We suggest using C:\Remits.

Throughout this Help File we will be using Gateway EDI as the Clearinghouse referenced. If you use another Clearinghouse or method for obtaining 835 remittances, you will need to contact them for instructions on how to download the information.

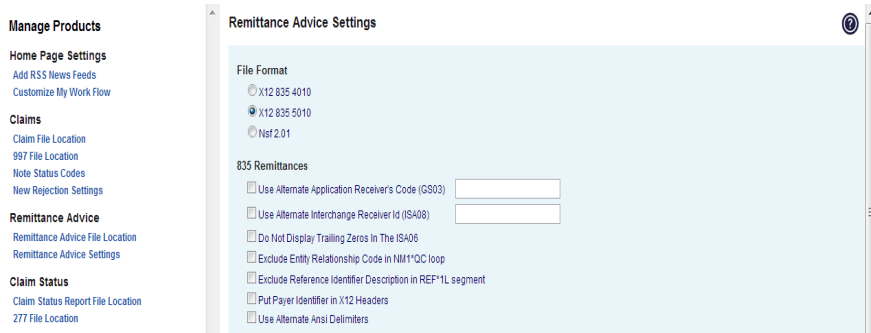
Gateway EDI Settings:

1. Make a folder for your 835 remittances. A folder may be created anywhere on your computer that you have free space, but we recommend C:\Remits.
2. Sign in to your Gateway account. Check your settings by going to **Manage Payments** and clicking on the Wrench icon.



****If when you click on the Manage Payments tab you don't see this screen you are most likely not signed up to receive Remittances. You should contact Gateway EDI for more information regarding the enrollment process. ****

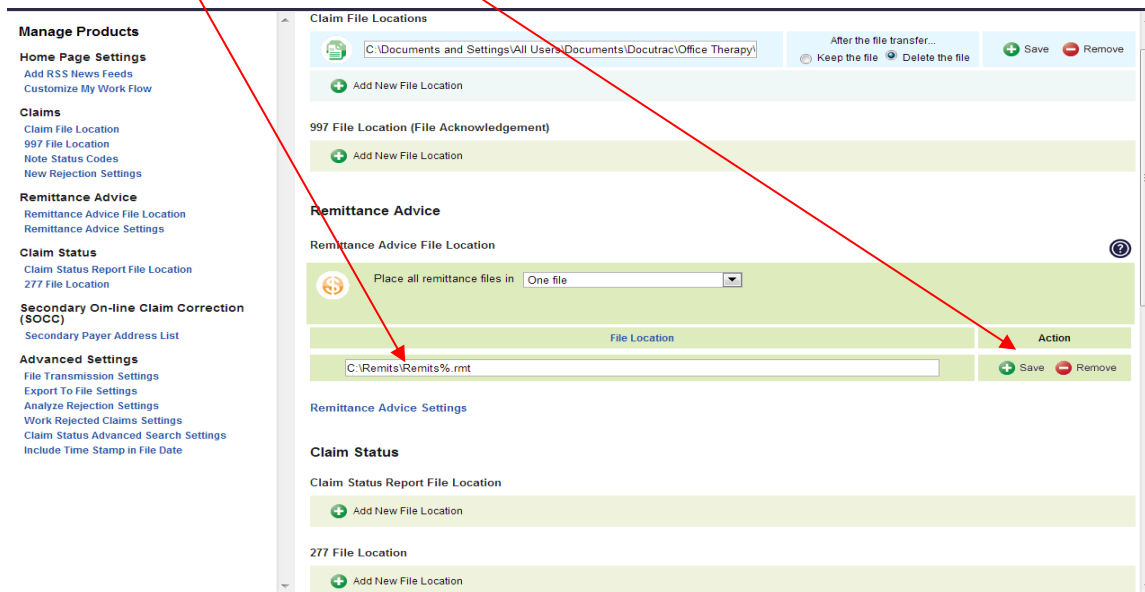
3. Select the **Remittance Advice Settings** link from the left-hand menu.
4. Make sure the **5010 format** is set.



5. Click on **Claim File Location** link on the left side of the screen. Set "**Place all remittance files in**"-one file.

6. Under the **Remittance Advice** section type in the file location- C:\Remits\Remits%.rmt . If you created a different folder in #1, use that folder path and add "\Remits%.rmt" to the end.

7. Click **Save** in the **Remit Advice Action** column.



Select and download your 835 files from GEDI

1. Sign in to your Gateway account.
2. Go to Manage Payments>View Insurance Payments>then select the remits you want to download by checking the box.

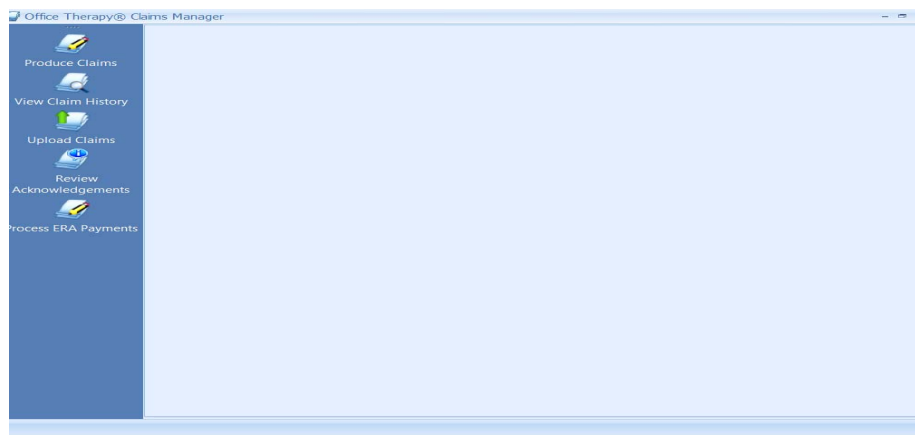
The screenshot shows the GEDI interface for selecting remittances. At the top, there are search criteria including 'Search By: Check Date', a date range selector (From: 11/12/2012, To: 11/19/2012), and a 'Search' button. Below this, there are options to 'Choose a View Option' (Standard Style or Medicare Style), 'Choose a Sort Option' (Patient Name or Account Number), and 'Or Choose an Action' (Download Selected, Archive Selected, View Secondary Report). A table of remittances is displayed with columns for 'Select All', 'Check Date', and 'Pay Method'. The table contains five rows of data, with the first four rows checked. A red arrow points to the 'Download Selected' button.

	Select All	Check Date	Pay Method
TOTALS			
1	<input checked="" type="checkbox"/>	11/16/2012	EFT
2	<input checked="" type="checkbox"/>	11/16/2012	Check
3	<input checked="" type="checkbox"/>	11/16/2012	Check
4	<input checked="" type="checkbox"/>	11/15/2012	EFT
5	<input type="checkbox"/>	11/13/2012	Non-payment
TOTALS			

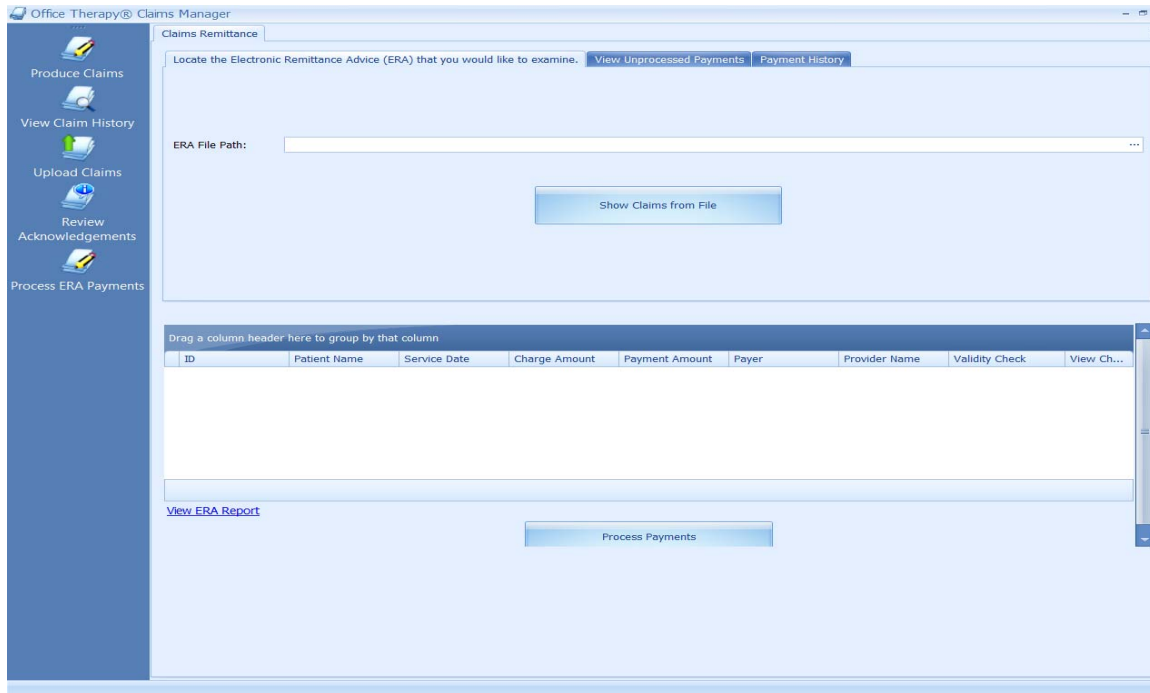
3. Click the **Download Selected** button and follow the steps prompted by GEDI.

Processing the ERAs in Claims Manager

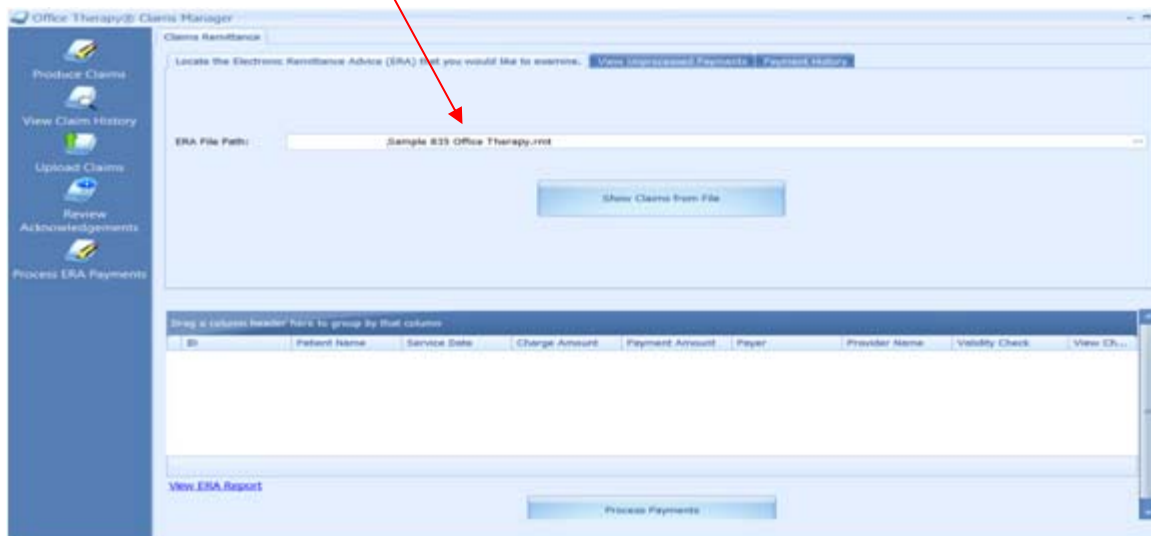
1. Open the Claims Manager from Office Therapy.
2. On the left side of the screen you will see the option to **Process ERA Payments**. Click here.



3. You will now see the new ERA claims remittance screen.

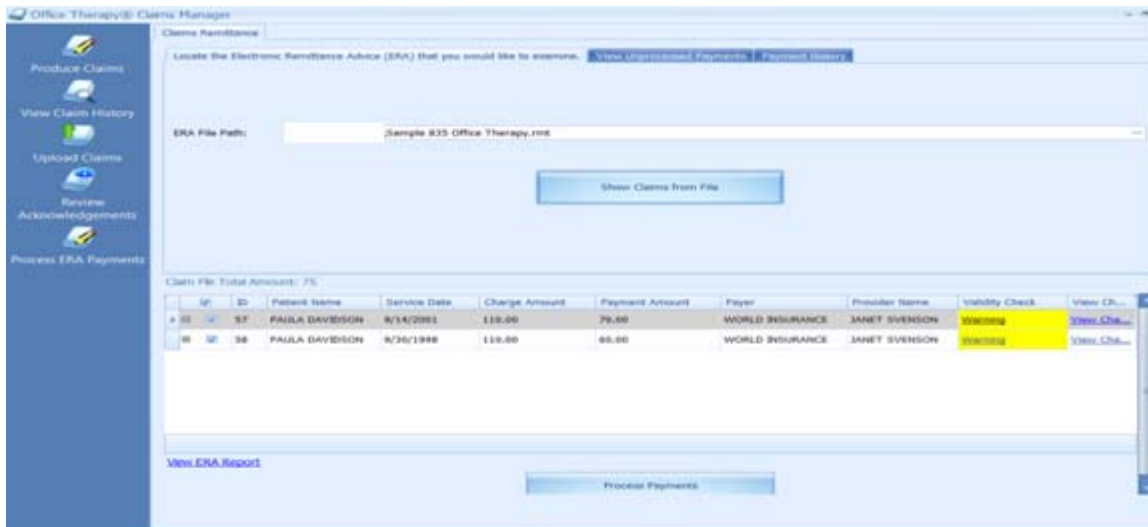


4. Click in the **ERA Path File**. This allows you to browse to your 835 remittance files. Select the one you want to post.

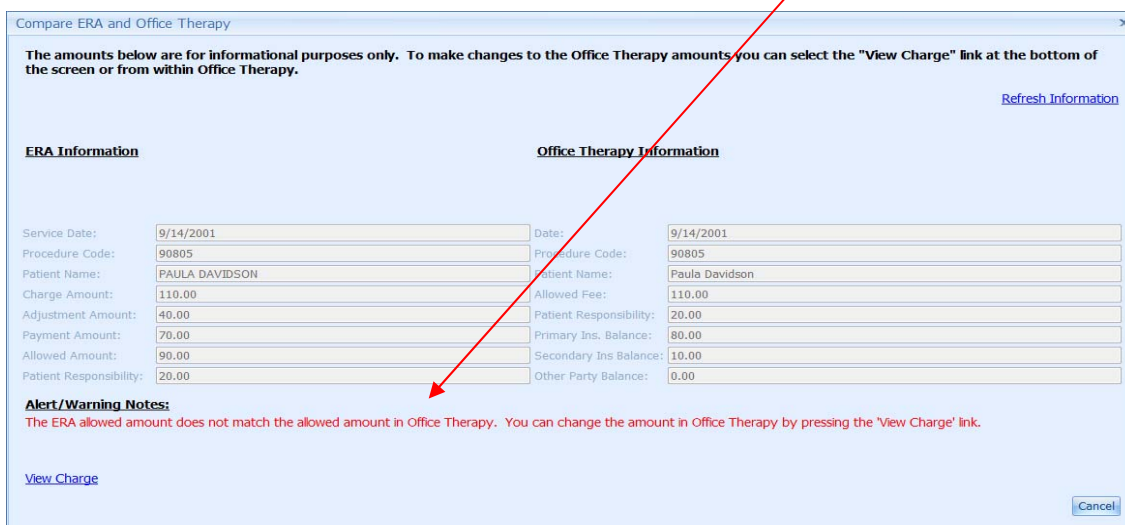


5. Click on the **Show Claims from File** button.

- You will now see every payment in that ERA in the grid below. Any payment information that does not match what is in Office Therapy will be flagged as a **Warning** or **Alert**. These statuses will highlight individual payments that need to be reconciled before processing the payment.



- By clicking on the **Warning** box, you will be able to compare the ERA information with Office Therapy information. The Alert/Warning note in **Red** will tell you what information is not matching.



- To view (or edit) the charge in Office Therapy, click on the **View Charge** link.

- Once in the charge, only the **Yellow Fields** can be changed. Once the **Save** button is selected, all of the items in yellow will be updated in Office Therapy. You can choose to make this the **Standard Charge**.

Update Office Therapy

Paula Davidson for service date 9/14/2001

Provider Fee: 110.00
 Fee Reduction: 20.00
 Allowed Fee: 90

Only the amounts in yellow are updateable.
[Click here to make this the standard charge](#)

Name	Role	Fixed Amount Due	Adjustment	Total Paid	Charge ID
Paula Davidson	Self	\$20.00	\$0.00	\$0.00	614
Magellan	Secondary	\$0.00	\$0.00	\$0.00	615
> WORLD INSURANCE	Primary	\$70.00	\$0.00	\$0.00	616

\$90.00

Cancel Save

- Once changes to the charge have been saved, select the Refresh Information link to reflect the updated Office Therapy information.

- On the main screen, you can now process the payment individually by clicking the **Process Payment** button or continue to work through the ERA and process the payments all at once. Any item with a red "Alert" validity check will not be processed.

Office Therapy® Claims Manager

Claims Remittance

Locate the Electronic Remittance Advice (ERA) that you would like to examine. [View Unprocessed Payments](#) [Payment History](#)

ERA File Path: X:\For Donna\835\Sample 835 Office Therapy.rmt

Show Claims from File

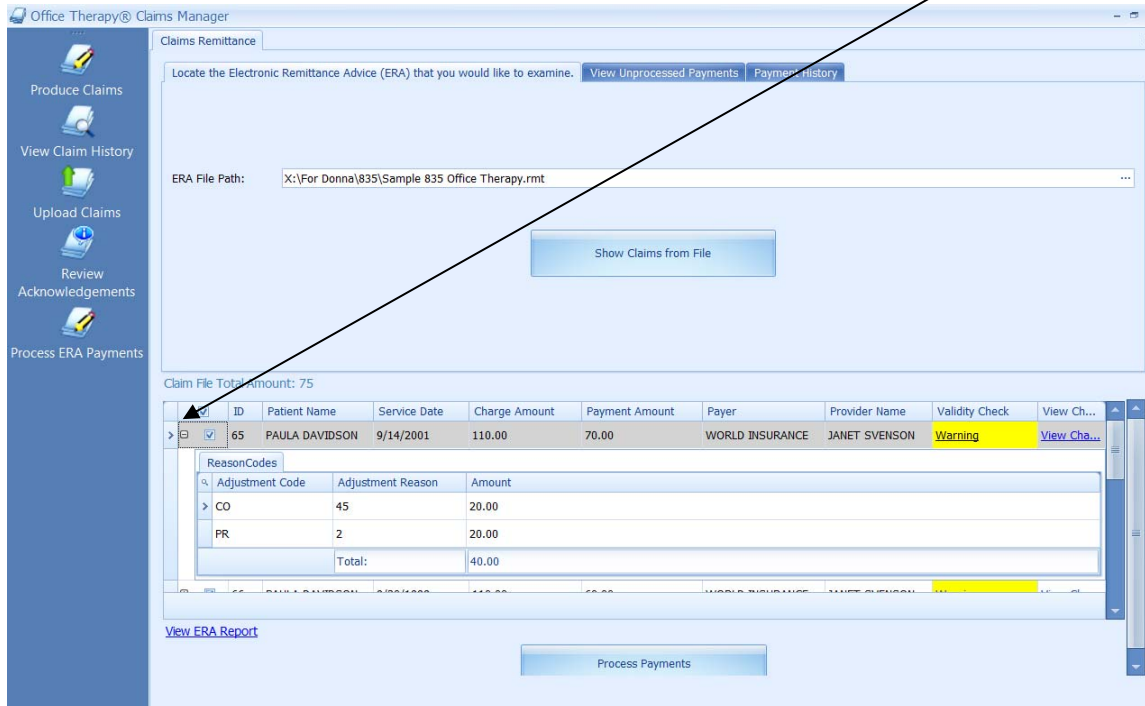
Claim File Total Amount: 75

ID	Patient Name	Service Date	Charge Amount	Payment Amount	Payer	Provider Name	Validity Check	View Ch...
65	PAULA DAVIDSON	9/14/2001	110.00	70.00	WORLD INSURANCE	JANET SVENSON	Warning	View Cha...
66	PAULA DAVIDSON	9/30/1998	110.00	60.00	WORLD INSURANCE	JANET SVENSON	Warning	View Cha...

View ERA Report

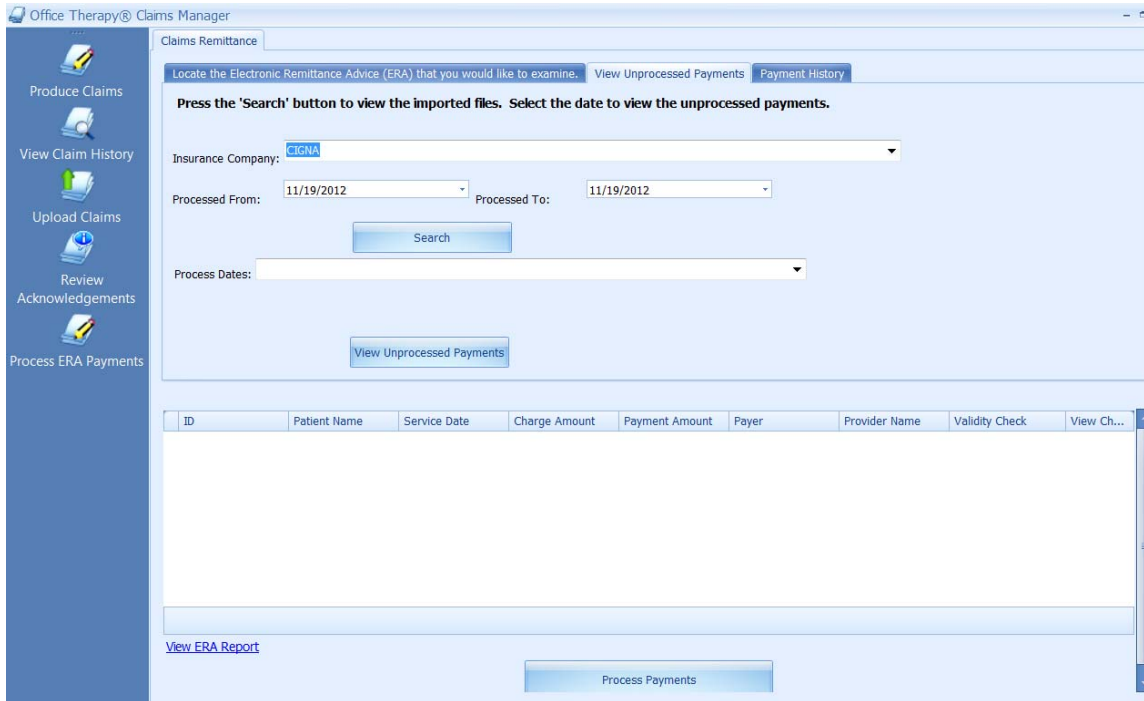
Process Payments

12. You can view the adjustment codes and amounts by clicking on the **+ sign** by the Client's name.



13. To review an ERA Report, click on the [View ERA Report](#) link. This report will list all of the payments contained in the remittance file that you are working with.

14. By clicking on the **View Unprocessed Payments** tab you will be able to search your imported files. You can filter by Insurance Payer and date. This tab will show you only the payments that have not been processed. If any of the payments in the file have been processed previously, they will not show on the **View Unprocessed Payments** screen.



15. By clicking on the **Payment History** tab you will be able to view all payments that have been processed.

