How to Post a HRA Payment?

07/24/2024 11:39 am EDT

Increasingly employers are offering employees an HRA, or Health Reimbursement Account to help offset medical expenses. It's not really 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 patient payment.

Option 1 - Adding HRA as secondary/tertiary insurance

Now, let us see how to post the payment by adding HRA 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 click Save Demographics.

dr chrono	👗 Dr. Eugene Walsh 👻 Srinivasa Sai (srinivasasai) ෆ්
Schedule Clinical Pa	itients Reports Billing Account Help 💲 👗 🔂 Search 🔂 💆 🚍
+ Add new patient	(Male 16 years old March 7, 2000) ADBR0000001
Demographics Appointments	Phone: Missing Email: david.prabhakaran@drchrono.com Added: March 25, 2015 Address: Palm Ave Mountain View, CA 94040 CDS:
Clinical Dashboard Documents	Primary Provider: Dr. Eugene Walsh New Referral Fax Demographics + Schedule New Appointment
Tasks 🛛	
Problem List 0	Important Demographics Insurances Eligibility Authorizations Smoking Status Flags Balance onpatient Payments
Medication List	✓ Sufficient patient demographics to bill insurance. 🍽 Patient is allergic to mushroon 🔰 Payment Outstanding
Send eRx	Primary Ins Secondary Ins Tertiary Ins Auto Accident Worker's Comp Durable Med Eqpt
Allergy List 3	Country Investor
Drug Interactions	Secondary Insurance Manage Alternative Insurances & History
CQMs	Subscriber is the Patient Insurance Company HRA ↓
Intake Data	Carrier Payer ID *printed on back of Insurance card
Lab Orders	Insurance ID Number

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4. Now, open the appointment's billing details screen to which we need to post the payment.

5. Click on the **+ sign** corresponding to the line item to add a new transaction.

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ICD-9 to Con	vert Description															
Add ICD-9 cd																
to ICD-9 codes for	ind for this appointm	ent.														7
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-		Dr. Eugene	Walsh		o <mark>tion</mark> tatus changed from '	"" to "Bill Ins	urance"									

6. Select the check date, 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).

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+ Add Lin																	

7. From the reason code drop-down, select **Insurance payment** and enter the payment in the **Ins 1 paid** field.

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8. From the insurance drop-down, please select [2] HRA (or [3] if in the tertiary insurance field) and click on Verify and Save.

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Option 2 - Post as a patient payment

Now, we will see how to post HRA payment as a patient payment.

1. Hover the cursor on the Billing tab and select Patient Payments.

Billing
BILLING
Billing Summary
Live Claims Feed
Patient Payments
Day Sheet
Transactions
Remittance Reports
Unmatched ERAs
Insurance Credit Card Payments
Accounts Receivable
Patient Statements
Product/Procedure
Patient Balance Ledger
Fee Schedule
Underpaid Items
Adjustment Master
Sales Tax
Billing Log

2. Click on the **Payments** tab and enter the patient name in the respective field and click on **Update**.



3. 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.

		9			
Filter by Range: \$	- \$	Provider: All -			
					C Update
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	nent Date Appointment	Line Item Provider	Payment Method Type	Notes Amount Total	O O Receipt
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4. To add a payment, click on the green + Add button

Filter by Range:	\$ -	\$	Provider:	All 🔻						
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Oct 20, 2020	Oct 20, 2020				Cash	Credit		\$25.00		Generation
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5. A New Cash window will open so you can enter the payment details.

- Payment Date The date you are posting the payment
- 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.
- Line Item If you select a specific appointment to apply the payment, you can specify which line item (CPT/HCPCS/Custom Code) the payment should be applied to. Any charges on the specific appointment will show in the drop-down.
- **Provider** this line designates the provider for the specific payment. It can be left blank if you prefer.
- Payment Method this is to identify the type of payment (cash, check, etc)
- **Type** this is to specify the type of payment.
 - Credit a payment on the account
 - Refund an amount is being refunded to the patient
 - Correction used to correct a previous posting error
 - Copay/Coinsurance used to identify the payment as a copay/coinsurance
 - Other used for situations not specifically mentioned above
- 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.

New Cash				×
Payment Date	10/20/2020			
Appointment		~		
Line Item	-No Line Item-	~		
Provider		~		
Payment Method	- Select Type -	~		
Туре	Credit	~		
Notes				
Amount	\$			
			Add	Cancel

6. Enter the payment details and click on Add.

New Cash		×
Payment Date	10/20/2020	
Appointment		~
Line Item	-No Line Item-	~
Provider		~
Payment Method	- Select Type -	~
Туре	Credit	~
Notes		
Amount	\$	<i>li</i>
		Add Cancel

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 **unallocated** (marked in red). If it is attached to a particular appointment and/or line item, the information will show in the spots marked by the blue boxes.

• 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.

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rom	То	Filter by Range:	\$	- \$	Provider: All	-						
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8. To move money from Unallocated Payment and associate it with an appointment, click on the circle over on the right, sometimes referred to as a radio button.

Pri	nt/Exp	ort 🗸	+ Add										
	#		Unallocated	Posted Date	Payment Date	Appointment	Line Item	Provider	Payment Method	Туре	Notes	Amount	Total
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9. Once you click on the radio button, a **Move Cash** window will open. This will allow you to select the appointment and the line item, as well as the amount to transfer.

• For the example below, even though the patient has \$25 in their unallocated cash, we can choose only to

move \$5 or \$10 of it and leave the remaining unallocated, or use it for a different appointment.

• To change the amount, just click on the box on the **Amount** line and adjust it to fit your situation.

Appointment	- Unallocated/No Appo	ointme 🗸
Line Item	-No Line Item-	~
Amount	\$ 25 out of \$	25.00
Extra Notes		
Payment Type	Credit	~

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