

# 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**.

The screenshot shows the DrChrono interface for a patient's demographics. The 'Insurances' tab is selected and highlighted with a red box. Below it, the 'Secondary Insurance' section is visible, with the 'Insurance Company' dropdown menu set to 'HRA', also highlighted with a red box. The patient's information includes: (Male | 16 years old | March 7, 2000), Phone: Missing, Email: david.prabhakaran@drchrono.com, Address: Palm Ave, Mountain View, CA 94040, and Primary Provider: Dr. Eugene Walsh. There are also status indicators for 'Sufficient patient demographics to bill insurance', 'Patient is allergic to mushroom', and 'Payment Outstanding'.

dr chrono | Dr. Eugene Walsh | Srinivasa Sai (srinivasasai)

Schedule Clinical Patients Reports Billing Account Help

Subscriber is the Patient  Insured person is the same person as the Patient

Insurance Company: HRA

Carrier Payer ID: [ ] \*printed on back of insurance card

Insurance ID Number: [ ]

Insurance Group Name: [ ] \*if available

Insurance Group #: [ ] \*if available

Insurance plan name: [ ] \*if available

Insurance plan type: [ ] \*if available

Insurance claim office number: [ ] \*if available

Secondary insurance type code: [ ] \*required for Medicare plans only

Card issued date: [ ] \*Required for checking eligibility of CA Medicaid

Secondary Insurance Notes: [ ]

Insurance Photo Front: Choose File No file chosen

Insurance Photo Back: Choose File No file chosen

**Save Demographics**

Feedback Support

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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Patient's unallocated payment \$480.00 Primary Insurer: (60054) Aetna Secondary Insurer: () HRA Payment Outstanding Patient is allergic to mushroom

#	ICD-10	Description	Line Item	NDC Code	Quantity	Units										
	Add ICD-10 code			Add NDC code	1	UN (Unit)										
No ICD-10 codes found for this appointment.																
#	ICD-9 to Convert	Description														
	Add ICD-9 code															
No ICD-9 codes found for this appointment.																
Code/Check Date	Description	Mod/Posted Date	Service Date	Qty/Min	Dx Pointers	Price	Billed	Allowed	Adjmt	Ins 1 paid	Ins 2 paid	Pt Paid	Ins Bal	Pt Bal	Status/Adj Type	
Totals:							\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Bill Insurance
C 99213				1.00	0 0 0	200	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0	\$0.00	\$0.00		

+ Add Line Item Delete Selected Reparse ERA Claim Info Status Inquiry Verify & Save

Logs

Datetime	User	Description
Sep 15, 2016 11:27:07 PM	Dr. Eugene Walsh	Billing status changed from "" to "Bill Insurance"
Sep 15, 2016 11:26:59 PM	Dr. Eugene Walsh	Billing status changed from "" to "Bill Insurance"

Feedback Support

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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Schedule Clinical Patients Reports Billing Account Help

Patient's unallocated payment \$480.00 | Primary Insurer: (60054) Aetna | Secondary Insurer: () HRA | Payment Outstanding | Patient is allergic to mushroom

#	ICD-10	Description	Line Item	NDC Code	Quantity	Units
				Add NDC code	1	UN (Unit)

Code/Check Date	Description	Mods/Posted Date	Service Date	Qty/Min	Dx Pointers	Price	Billed	Allowed	Adjmt	Ins 1 paid	Ins 2 paid	Pt Paid	Ins Bal	Pt Bal	Status/Adj Type
Totals: \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 Bill Insurance															
C 99213			09/16/2016	1.00	1 0 0 0 0 200	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0	\$0.00	\$0.00	
			09/16/2016							0	0	[1] Aetna	0: Settled		

Feedback Support

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

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Schedule Clinical Patients Reports Billing Account Help

Patient's unallocated payment \$480.00 | Primary Insurer: (60054) Aetna | Secondary Insurer: () HRA | Payment Outstanding | Patient is allergic to mushroom

#	ICD-10	Description	Line Item	NDC Code	Quantity	Units
				Add NDC code	1	UN (Unit)

Code/Check Date	Description	Mods/Posted Date	Service Date	Qty/Min	Dx Pointers	Price	Billed	Allowed	Adjmt	Ins 1 paid	Ins 2 paid	Pt Paid	Ins Bal	Pt Bal	Status/Adj Type
Totals: \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 Bill Insurance															
C 99213			09/16/2016	1.00	1 0 0 0 0 200	\$0.00	\$0.00	\$0.00	\$0.00	0	0	[1] Aetna	0: Settled		
			09/16/2016							0	0	[1] Aetna	0: Settled		

Feedback Support

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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Schedule Clinical Patients Reports Billing Account Help

Patient's unallocated payment \$480.00 | Primary Insurer: (60054) Aetna | Secondary Insurer: () HRA | Payment Outstanding | Patient is allergic to mushroom

#	ICD-10	Description	Line Item	NDC Code	Quantity	Units
				Add NDC code	1	UN (Unit)

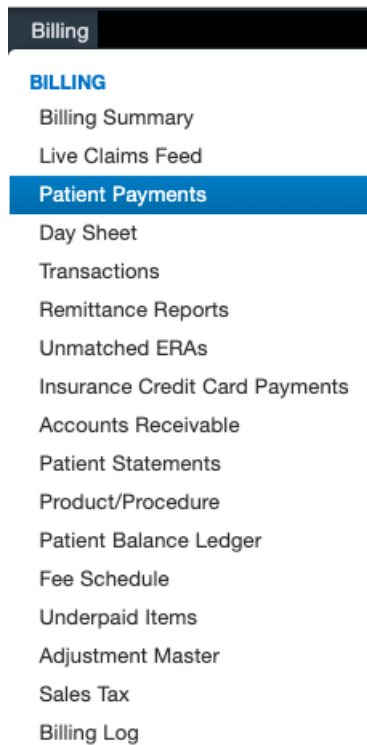
Code/Check Date	Description	Mods/Posted Date	Service Date	Qty/Min	Dx Pointers	Price	Billed	Allowed	Adjmt	Ins 1 paid	Ins 2 paid	Pt Paid	Ins Bal	Pt Bal	Status/Adj Type
Totals: \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 Bill Insurance															
9213			16/2016	1.00	1 0 0 0 0 200	\$0.00	\$0.00	\$0.00	\$0.00	0	0	[1] Aetna	0: Settled		
			09/16/2016							0	0	[1] Aetna	0: Settled		

Feedback Support

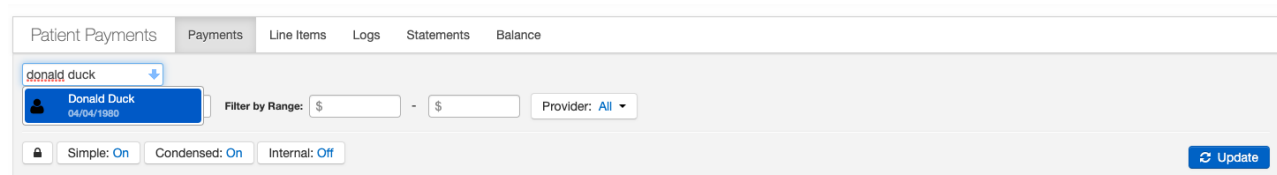
Option 2 - Post as a patient payment

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

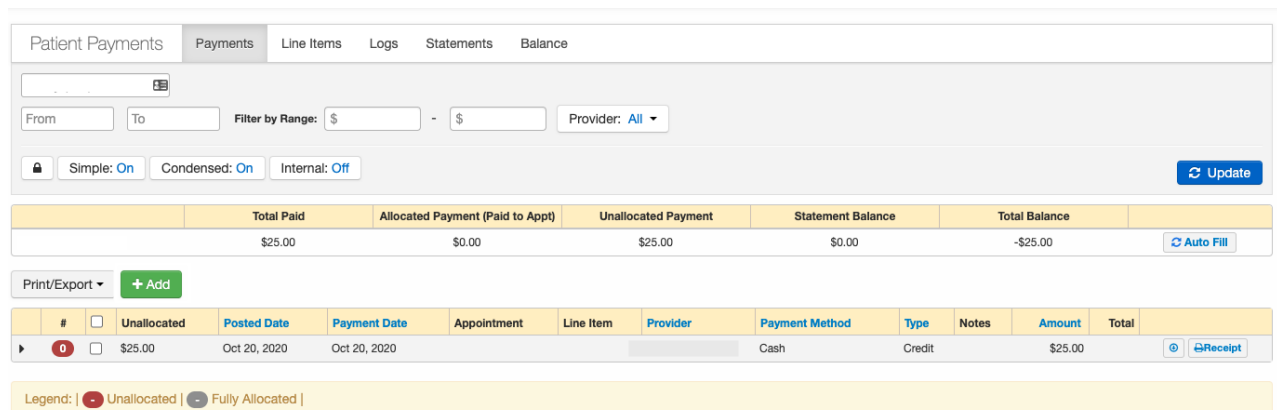
1. Hover the cursor on the Billing tab and select **Patient Payments**.



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.



4. To add a payment, click on the green **+ Add** button

Patient Payments | Payments | Line Items | Logs | Statements | Balance

From: [ ] To: [ ] Filter by Range: \$ [ ] - \$ [ ] Provider: All [v]

Simple: On | Condensed: On | Internal: Off [Update]

Total Paid	Allocated Payment (Paid to Appt)	Unallocated Payment	Statement Balance	Total Balance
\$25.00	\$0.00	\$25.00	\$0.00	-\$25.00

Print/Export [v] **+ Add** [Auto Fill]

#	Unallocated	Posted Date	Payment Date	Appointment	Line Item	Provider	Payment Method	Type	Notes	Amount	Total
1	<input type="checkbox"/>	Oct 20, 2020	Oct 20, 2020				Cash	Credit		\$25.00	

Legend: ● Unallocated | ● Fully Allocated

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** [x]

Payment Date: 10/20/2020

Appointment: [v]

Line Item: -No Line Item-

Provider: [v]

Payment Method: - Select Type -

Type: Credit

Notes: [ ]

Amount: \$ [ ]

[Add] [Cancel]

6. Enter the payment details and click on **Add**.

**New Cash** ×

Payment Date:

Appointment:

Line Item:

Provider:

Payment Method:

Type:

Notes:

Amount: \$

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.

Patient Payments | Payments | Line Items | Logs | Statements | Balance

From:  To:  Filter by Range: \$  - \$  Provider: All

Simple: On | Condensed: On | Internal: Off

Total Paid	Allocated Payment (Paid to Appt)	Unallocated Payment	Statement Balance	Total Balance
\$25.00	\$0.00	\$25.00	\$0.00	-\$25.00

Print/Export

#	Unallocated	Posted Date	Payment Date	Appointment	Line Item	Provider	Payment Method	Type	Notes	Amount	Total
▶ 0	<input type="checkbox"/>	\$25.00	Oct 20, 2020	Oct 20, 2020	<input type="text"/>	<input type="text"/>	Cash	Credit		\$25.00	<input type="button" value="Receipt"/>

Legend: |  Unallocated |  Fully Allocated |

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.

Print/Export

#	Unallocated	Posted Date	Payment Date	Appointment	Line Item	Provider	Payment Method	Type	Notes	Amount	Total
▶ 0	<input type="checkbox"/>	\$25.00	Oct 20, 2020	Oct 20, 2020	<input type="text"/>	<input type="text"/>	Cash	Credit		\$25.00	<input type="button" value="Receipt"/>

Legend: |  Unallocated |  Fully Allocated |

Amount	Total
\$25.00	<input type="button" value="Receipt"/>

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.

### Move Cash ×

Appointment

Line Item

Amount

Extra Notes

Payment Type

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

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