Moving charges listed under Ins Bal to the patient

07/24/2024 6:50 pm EDT

There may be times when you need to move a charged amount listed under "Ins Bal" (Insurance Balance) in the Live Claims Feed, to the patient's responsibility (Pt Bal).

One example would be if you are manually posting a denial from a payer because the patient was not covered on the date of service. Best practice would say you would notate in the billing notes that the payer denied stating the patient did not have coverage. The charges then need to be transferred to the patient's responsibility allowing a patient statement to be generated.

This is how the view will look as you are entering the denial. The $100 originally billed to the insurance and showing under "Ins Bal" needs to be transferred to the patient and shown under the "Pt Bal" column.

Billed	Allowed	Adjmt	Ins 1 paid	Ins 2 paid	Pt Paid	Ins Bal	Pt Bal	Status/Adj Type	
$100.00	$100.00	$0.00	$0.00	$0.00	$0.00	$100.00	$0.00	⟳ Bill Insurance	☰
$100.00	$100.00	$0.00	$0.00	$0.00	$0.00	$100.00	$0.00	Bill Insurance	$ ☰ +

⟳ Reparse ERA   i Claim Info   ⟲ Status Inquiry   ✓ Verify & Save

First, click on the blue plus on the right side of the screen.

Billed	Allowed	Adjmt	Ins 1 paid	Ins 2 paid	Pt Paid	Ins Bal	Pt Bal	Status/Adj Type	
$100.00	$100.00	$0.00	$0.00	$0.00	$0.00	$100.00	$0.00	⟳ Bill Insurance	☰
$100.00	$100.00	$0.00	$0.00	$0.00	$0.00	$100.00	$0.00	Bill Insurance	$ ☰ +

⟳ Reparse ERA   i Claim Info   ⟲ Status Inquiry   ✓ Verify & Save

This will open a new row where you can transfer the charges to the patient.

Billed	Allowed	Adjmt	Ins 1 paid	Ins 2 paid	Pt Paid	Ins Bal	Pt Bal	Status/Adj Type	
$100.00	$100.00	$0.00	$0.00	$0.00	$0.00	$100.00	$0.00	⟳ Bill Insurance	☰
$100.00	$100.00	$0.00	$0.00	$0.00	$0.00	$100.00	$0.00	Bill Insurance	$ ☰ +
Adjmt Reas: Insurance Payme ⌄		0	0	[1] Aetna ⌄	0: Settled ⌄	--------- ⌄			✗

⟳ Reparse ERA   i Claim Info   ⟲ Status Inquiry   ✓ Verify & Save

Under "Adjust Reas", use the drop-down to select "Transfer Balance to Patient".

Adjmt Reas
✓ Insurance Payment
Patient Bad Debt Writeoff
Insurance Bad Debt Writeoff
Transfer Balance to Patient
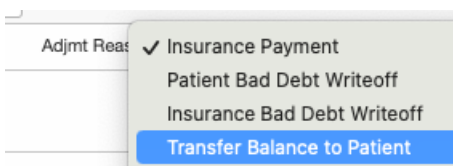
Enter the amount of the charge being transferred to the patient under the "Adjmt" column (the first box) and click

"Verify & Save". You do not need to enter any symbols before the number.

Billed	Allowed	Adjmt	Ins 1 paid	Ins 2 paid	Pt Paid	Ins Bal	Pt Bal	Status/Adj Type	
$100.00	$100.00	$0.00	$0.00	$0.00	$0.00	$100.00	$0.00	⟳ Bill Insurance	☰
$100.00	$100.00	$0.00	$0.00	$0.00	$0.00	$100.00	$0.00	Bill Insurance	$ ⊞ +
Adjmt Reas: Transfer Balance ▾		100.00	0	[1] Aetna ▾	0: Settled ▾	--------- ▾			✖
								⟳ Reparse ERA i Claim Info ➤ Status Inquiry ✔ Verify & Save	

Now the charge should show under "Pt Bal" and "Ins Bal" should show as $0.00. Now when you run a patient statement, this date of service/amount will appear.

Billed	Allowed	Adjmt	Ins 1 paid	Ins 2 paid	Pt Paid	Ins Bal	Pt Bal	Status/Adj Type	
$100.00	$100.00	$0.00	$0.00	$0.00	$0.00	$0.00	$100.00	❶ Balance Due	☰
$100.00	$100.00	$0.00	$0.00	$0.00	$0.00	$0.00	$100.00	Balance Due	$ ⊞ +
Adjmt Reas: Transfer Balance ▾		100.00	0	[1] Aetna ▾	0: Settled ▾	--------- ▾		SKIP SECONDARY	✖