

# Setting Up and Using TriZetto with Eyefinity Practice Management

## In this document:

- [Setting Up Electronic Claim Submissions for TriZetto, 1](#)
- [Billing Claims Through TriZetto, 3](#)
- [Processing and Posting Remittance Payments, 5](#)

This document tells you how to set up and use Eyefinity Practice Management to submit claims and receive remittances through TriZetto (formerly Gateway EDI).

### NOTES

- Before you can use these features, you must contact Eyefinity Customer Support to set up your TriZetto integration and activate the electronic remittance advice capability.
- After you submit a claim to TriZetto, Eyefinity Practice Management changes the status of the claim to Billed in Claims Management. To determine the actual status of the claim, log in to the TriZetto website. For information about accessing the TriZetto website, contact your TriZetto representative.

## Setting Up Electronic Claim Submissions for TriZetto

You must set up the electronic claim submission integration and enable it for each insurance carrier you want to use with TriZetto in Eyefinity Practice Management Administration.

This section includes the following topics:

- [Activating the Third Party Billing Integration, 2](#)
- [Setting Up EDI Site Keys for an Individual Office, 2](#)
- [Enabling Electronic Claim Submissions for Individual Insurance Plans, 3](#)

## Activating the Third Party Billing Integration

Once you enter your EDI Site Key, you can then activate electronic claim submissions for individual carriers in Carrier & Plan Setup. For more information, go to [“Enabling Electronic Claim Submissions” on page 76](#).

### NOTE

- Eyefinity recommends you process any outstanding claims for your current EDI receiver before selecting a different receiver.
- Settings made on the Insurance Integrations page in Company: Setup apply to all offices in your company, but you can also set up an EDI Site Key for an individual office. For more information, go to [Setting Up EDI Site Keys for an Individual Office, 2](#).

1. In Company: Setup, click **Insurance** and then select **Insurance Integrations**.
2. Select **Gateway EDI 837** as the **EDI Receiver**.
3. Type the **Senders Code/Site Key** you received from TriZetto.

Company: Insurance Integrations

Third Party Billing

Select your EDI Receiver Gateway EDI 837 (5010 Version)

\* Senders Code/Site Key AB12

To map your carriers and plans, go to Carrier & Plan Setup.

Cancel Save

4. Click **Save**.
- Go to [“Enabling Electronic Claim Submissions for Individual Insurance Plans” on page 3](#) to complete the setup.

## Setting Up EDI Site Keys for an Individual Office

1. In Office: Setup, click **Integrations**.
2. In the Integrations window, click **Edit**.
3. A warning message appears, asking you to confirm that you understand that changing the integration information may break your integration. If you still want to edit the information, click **I Understand the Risk**.

- Under **Third Party Billing**, enter your **Senders Code/Site Key**.

Office: 936 - Eyefinity 936 - Integrations

**Contact Lens Ordering**

Contact Lens Supplier: Eyefinity - ABB

ABB Concise / ODG Account #: ABB123

Order Processing Type:  Batch Order  Single Order

\* Minimum Total Cost for Batch Order: 525

**Credit Card Processing**

Credit Card Processing Type:  Automatic  Manual

**Third Party Billing**

EDI Receiver: Gateway EDI 837 (S010 Version)

Senders Code/Site Key: hitecT1

ECR Vault:  Enabled

ECR Vault URL: https://10.50.32.116/ecrv/

Save

- Click **Save**.  
Go to “Enabling Electronic Claim Submissions for Individual Insurance Plans” on page 3 to complete the setup.

### Enabling Electronic Claim Submissions for Individual Insurance Plans

- In Company: Setup, click **Insurance** and select **Carrier & Plan Setup**.
- Locate the carrier(s) and select the **Electronic Claim Submission** check box.

Insurance: Carrier & Plan Setup

Gateway EDI 837

Carrier/Plan: Aetna | Payer ID: Search for payer ID | Active Only | Search

Electronic Claim Submission	Payer ID	Carrier	Plan	Plan Address 1	Address 2	City	State	Zip	Active
<input checked="" type="checkbox"/>	00010	AETNA	Aetna International	Aetna International	P.O. Box 981543	El Paso	TX	79998	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	60054	AETNA	Aetna Manual Plan	Aetna Inc	PO Box 981107	El Paso	TX	79998	<input checked="" type="checkbox"/>

- Click **Save**.

### Billing Claims Through TriZetto

After you set up Eyefinity Practice Management, you can start billing claims through TriZetto from Claims Management.

- From Claims Management, click **Billing Claim** and select **EDI Transmission**.

The Billing Claims - Gateway EDI Transmission window opens.

2. Select the insurance carrier you want to bill from the **Carrier** drop-down menu.

**NOTES**

- To view all claims with the status Ready to Bill, leave all other search criteria fields blank and click **Search**.
- Only carriers with the Electronic Claim Submission check box selected in Eyefinity Practice Management Administration display in the Carrier drop-down menu.

3. Type or select the date range in the **Service Date From** and **Service Date To** fields.
4. To search for claims by provider, select the providers from the **Provider** drop-down menu.

**NOTE**

All providers are selected by default in the Provider drop-down menu. Deselect **All** and select the check boxes for individual providers, if needed.

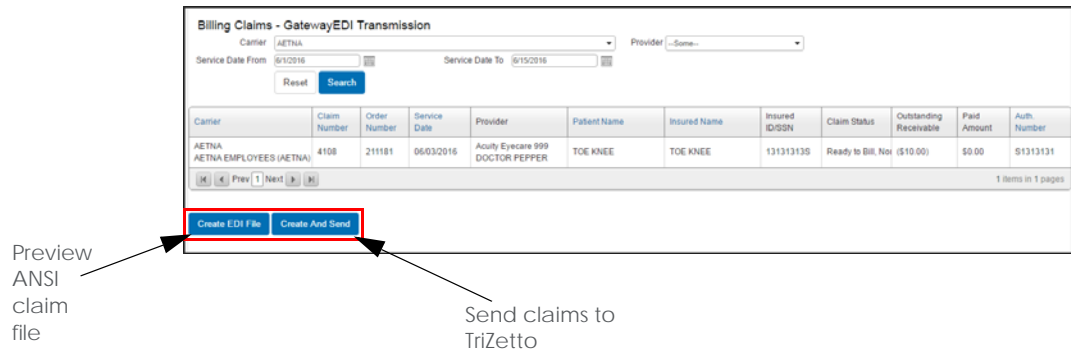
Carrier	Claim Number	Order Number	Service Date	Provider	Patient Name	Claim Status	Outstanding Receivable	Paid Amount	Auth. Number
AETNA AETNA EMPLOYEES (AETNA)	4108	211181	06/03/2016	Acuity Eyecare 999 DOCTOR PEPPER	TOE KNEE	Ready to Bill, No	(\$10.00)	\$0.00	61313131

5. Click **Search**.  
Claims that meet your search criteria display.

Carrier	Claim Number	Order Number	Service Date	Provider	Patient Name	Insured Name	Insured ID/SSN	Claim Status	Outstanding Receivable	Paid Amount	Auth. Number
AETNA AETNA EMPLOYEES (AETNA)	4108	211181	06/03/2016	Acuity Eyecare 999 DOCTOR PEPPER	TOE KNEE	TOE KNEE	131313135	Ready to Bill, No	(\$10.00)	\$0.00	61313131

6. To preview the ANSI 5010 file for the displayed claims before sending the claims to TriZetto, click **Create EDI File**.

- To send all of the displayed claims to TriZetto, click **Create And Send**. Eyefinity Practice Management changes the status of each claim to Billed and sends the claims to TriZetto. To view TriZetto's status for the claims, go to the TriZetto website.



## Processing and Posting Remittance Payments

This section includes the following topics:

- [Overview of Remittance Statuses, 5](#)
- [Searching for Remittances, 6](#)
- [Processing Remittances, 7](#)
- [Reviewing Errors, 21](#)
- [Deleting Remittances, 24](#)

### Overview of Remittance Statuses

The status of a remittance determines how the remittance can be edited and processed. The table below describes the remittance statuses in Eyefinity Practice Management.

Status	Description
Ready To Review	The remittance has been downloaded and is ready for processing.
In Review	The remittance is being processed.
Posting	The remittance is being posted, is scheduled to be posted as part of an integration <sup>1</sup> , or has errors that need to be resolved.
Posted	The remittance has been posted.

<sup>1</sup> Payments for remittances to be posted as part of an integration will not be reflected on patient statements or reports until after the remittances are posted.

## Searching for Remittances

Remittances are automatically downloaded from the carriers you have set up at a scheduled time as part of an integration. You can search for remittances by filtering them based on remittance status and by using search criteria.

1. From Claims Management, click **Process Payments** and select **Electronic Remittance Payment**.

The Electronic Remittance Payment window opens.

2. Select a remittance status to display the remittances with that status. Remittances with the Ready To Review status are displayed by default.

### NOTES

- The number of remittances that currently have a specific status is displayed in parenthesis.
- The number of remittances that currently have errors for each status is displayed in red.
- Select **Processing Error** to review a list of remittance download errors. For more information about remittance download errors, go to [“Reviewing Remittance Download Errors” on page 23.](#)

Select a status to display remittances with that status.

The number of remittances that have errors displays in red.

Select Processing Error to review a list of download errors.

The screenshot shows the 'Electronic Remittance Payment' window. On the left, a 'Remittance' menu is open, showing options: 'Ready To Review (0)', 'In Review (5)', 'Processing Error (1)', 'Posted (12)', 'Downloads', and 'Processing Error (694)'. The 'Processing Error (694)' option is highlighted in red. Below the menu is a search area with fields for 'Carrier', 'Payer ID', 'Remittance #', and 'Remit Date' (with 'To' field). A 'Search' button is present. Below the search area is a table of remittances with columns: Remittance #, Carrier, Payer ID, Remit Date, Claims, Payment Amount, Applied Amount, and Unapplied Amount. The table contains five rows of data.

Remittance #	Carrier	Payer ID	Remit Date	Claims	Payment Amount	Applied Amount	Unapplied Amount
5635917	Spectera (OptumHealth Vision)	55555	04/03/2018	5	(\$87.00)	(\$64.00)	(\$23.00)
779073	PTA Insurance	5555	04/03/2018	5	\$1,242.00	\$519.00	\$723.00
86240637	Davis Vision	12345	04/03/2018	5	\$1,944.32	\$342.00	\$1,602.32
1168313	AETNA	456	04/03/2018	5	\$211.51	(\$135.00)	\$346.51
952591	Medicare Part B	563535	04/03/2018	5	\$885.27	\$78.73	\$806.54

3. Select a carrier from the **Carrier** drop-down list or type the payer ID for the carrier in the **Payer ID** text box to search for remittances by carrier.
4. Type the remittance number in the **Remittance #** text box, if needed.
5. Type or select a date range in the **Remit Date** and **To** fields, if needed.
6. Click **Search**.

Use the search criteria to search for remittances by carrier, payer ID, remittance number, or date.

The screenshot shows the 'Electronic Remittance Payment' window with search criteria applied. The 'Carrier' dropdown is set to 'Davis Vision', the 'Remit Date' is '4/1/2018', and the 'To' field is '4/15/2018'. The 'Search' button is highlighted. Below the search area, the table shows one remittance entry for 'Davis Vision' with a payment amount of \$1,944.32 and an unapplied amount of \$1,602.32.

Remittance #	Carrier	Payer ID	Remit Date	Claims	Payment Amount	Applied Amount	Unapplied Amount
86240637	Davis Vision	12345	04/03/2018	5	\$1,944.32	\$342.00	\$1,602.32

The remittances with the selected status that meet your search criteria display.

## Processing Remittances

This section tells you how to process remittances. Topics include:

- [Opening and Navigating the Remittance Details Window, 7](#)
- [Editing Remittance Details, 8](#)
- [Reviewing Remittance Records for Claims, 9](#)
- [Posting Remittance Payments, 11](#)
- [Posting Multiple Remittance Payments to a Claim, 14](#)
- [Making Remittance Adjustments, 15](#)
- [Posting Remittance Payments to External Claims, 17](#)
- [Updating Claims for Payments, 18](#)
- [Reviewing Nonmatching Claim Information, 18](#)
- [Removing Payments, 19](#)
- [Posting Remittances, 20](#)

### Opening and Navigating the Remittance Details Window

The Remittance Details window provides remittance information including carrier, total payment amount, remittance status, payment type, and the number of claims associated with the remittance. A status bar is available that lets you see your progress as you post payments for a remittance. The status bar gives you a visual indication of the payment amount you have applied for a remittance and the remaining outstanding amount that needs to be applied.

1. Search for a remittance with the Ready To Review or In Review status. For more information on searching for remittances, go to [“Searching for Remittances”](#) on page 6.
2. Click the link for the remittance in the **Remittance #** column.

Remittance #	Carrier	Payer ID	Remit Date	Claims	Payment Amount	Applied Amount	Unapplied Amount
100000	Davis Vision	12345	04/03/2018	5	\$1,944.32	\$342.00	\$1,602.32

The Remittance Details window opens with the Not Applied tab displayed. The Not Applied tab includes all the claims in the remittance that need to be processed.

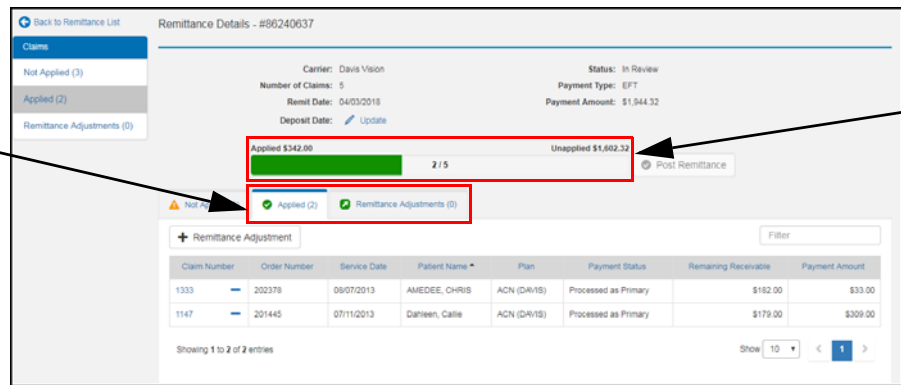
3. Select the **Applied** tab to see claims with payments applied for the remittance.

**NOTES**

- Eyefinity Practice Management automatically applies payments for claims with matching total receivable and payment amounts and places the claims in the Applied tab.
- An indicator appears in the Payment Amount column for claims automatically placed in the Applied tab with non-matching receivable and payment amounts. To remove the indicator, open the Claim Adjustments window, make any necessary changes, and save the payment.

4. Select the **Remittance Adjustments** tab to see remittance adjustments made for the remittance. For more information about remittance adjustments, go to [“Making Remittance Adjustments”](#) on page 15.
5. Review the status bar to see your progress for processing the remittance.

Select the Applied tab to see claims with payments applied or the Remittance Adjustments tab to see adjustments made.



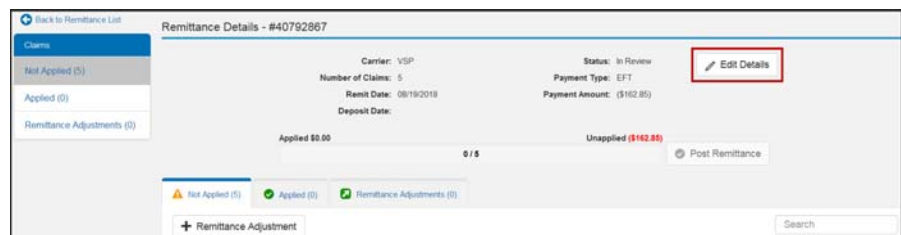
The status bar shows you the applied and unapplied totals for the remittance.

### Editing Remittance Details

From the Remittance Details window, you can edit the Carrier, Deposit Date, and Payment Type for remittances. Before you can post a remittance, you must enter a deposit date that does not occur within a month that has been closed. You must have the Edit Carrier Checks security permission to edit remittance details.

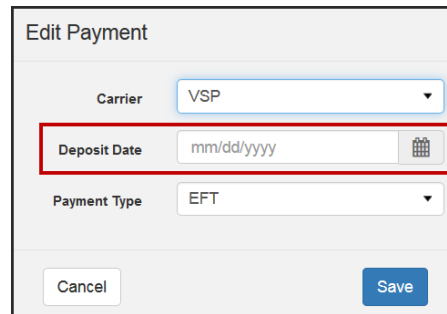
You can edit remittances with the Ready to Review, In Review, and Posted status. Remittances with Posting status can be edited only if there are posting errors that need correction.

1. Open the Remittance Details window for a remittance. For more information, go to [“Opening and Navigating the Remittance Details Window”](#) on page 7.
2. Click **Edit Details**.





3. Type or select a **Deposit Date**.



4. Change the **Carrier** and **Payment Type**, if necessary.
5. Click **Save**.

### Reviewing Remittance Records for Claims

You can review the remittance record provided for each claim included in a remittance from the Claim Adjustments window. You can view the remittance record within the Claim Adjustments window or in a separate popup window that you can move to a second monitor. If you view the remittance record within the Claim Adjustments window, you can collapse or expand the grid where the information appears. By default, the remittance record displays within the Claim Adjustments window with the grid expanded.

From the remittance record, you can perform the following actions:

- Expand the Claim Information section to review information in the remittance.
  - Expand the Reason Code column to show all reason codes for a line item or collapse the column to show only a reason code count.
  - Click the Payment Amount link for a line item to be taken directly to the Payment Amount field for the line item. You can also hover over a line item in the claim adjustments area to see the associated line item in the remittance record.
  - Review the grouped lens and lens option code line items for VSP remittances. The total shown in the Payment Amount column for the lens includes the payment on all grouped line items.
  - Hover over the codes in the Reason Code and Remark Code columns to review the explanations for claim adjustment reason and remark codes from the remittance.
1. Open the Remittance Details window for a remittance. For more information, go to [“Opening and Navigating the Remittance Details Window” on page 7](#).
  2. Click the link for a claim in the **Claim Number** column.  
The Claim Adjustments window opens.

- View the remittance record using one of the following methods:
  - Click the **Open New Window** icon to view the remittance record in a separate popup window.
  - Click the **Expand/Collapse** icon to expand or collapse the remittance record grid within the Claim Adjustments window.

**NOTE** The method you select is saved as your default option for viewing remittance records.

View remittance record in a separate window.

View claim information from remittance.

Hover over a line item to see the details available for the line item.

Expand or collapse remittance record grid.

Expand or collapse reason code column.

Review code explanations.

Click payment amount to go to Payment Amount field.

If you clicked the Open New Window icon, the remittance record opens in a separate popup window.

Claim Adjustments

Claim information

Service Information

Procedure Code	Description	Quantity	Charge	Payment Amount	Patient Pay Materials	CoPay	Reason Code	Remark Code
V2100	Lens - SV	2	\$99.00	\$7.00	\$0.00	\$10.00	Count: 2	
V2784	Lens, Polycarbonate Or Equal, Any Ind	2	\$40.00	Total: \$0.00	\$0.00	\$0.00	Count: 2	7K
-AD	Cov - AD - Polycarbonate	1	\$0.00	\$0.00	\$0.00	\$0.00	Count: 2	
V2020	Frame/Disp - Dr Supplied \$50	1	\$69.00	\$43.45	\$0.00	\$0.00	Count: 2	

You can move the remittance record popup window to a second monitor.

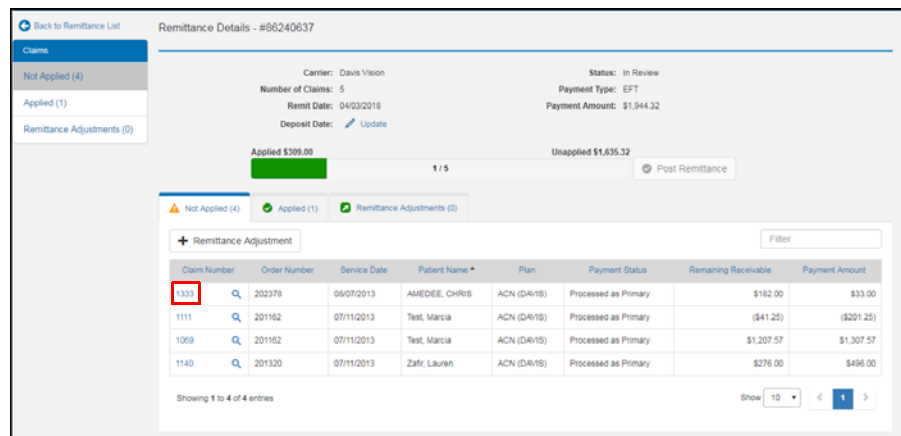
## Posting Remittance Payments

You can post payments to claims for remittances with the Ready to Review or In Review status.

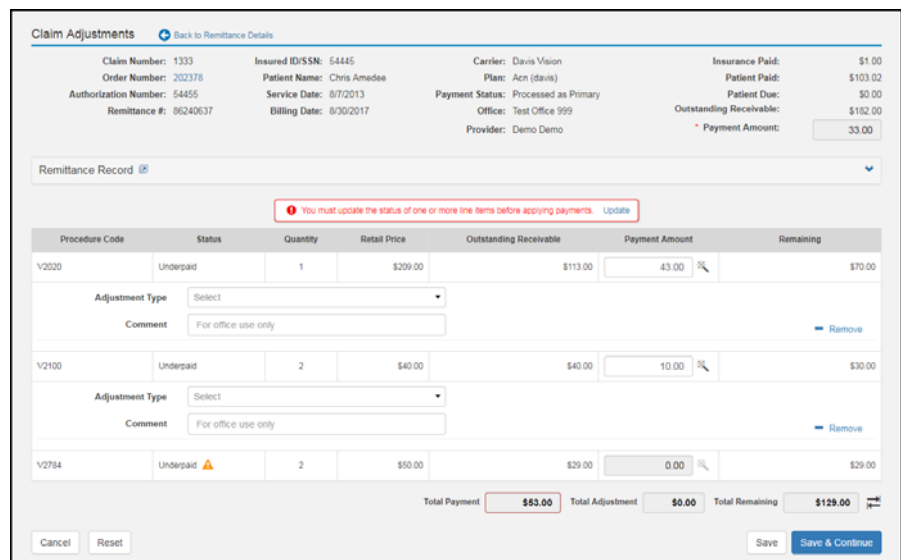
**NOTE**

If you recently moved to Claims Management from another billing system, you may need to post payments to external claims. For more information, go to “Posting Remittance Payments to External Claims” on page 17.

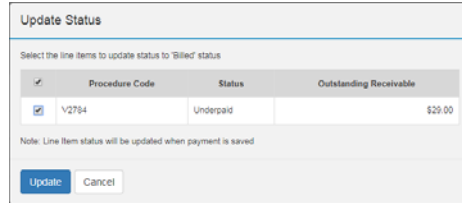
1. Open the Remittance Details window for a remittance. For more information, go to “Opening and Navigating the Remittance Details Window” on page 7.
2. Click the link for a claim in the **Claim Number** column.



The Claim Adjustment window opens.



3. If an error message displays indicating the status of one or more line items needs to be updated, follow the instructions below:
  - a. Click **Update**.  
 The Update Status window opens.
  - b. Select the check box for the line items with the status you want to update.
  - c. Click **Save**.



Eyefinity Practice Management changes the status of the line items to Billed in the Claims Adjustments window. If you do not save your changes in the Claim Adjustments window, the status changes made will be reverted.

4. Type the amount paid towards a line item in the **Payment Amount** text box next to the line item. You can click the **Automatically adjust line item** icon to have Eyefinity Practice Management make an automatic adjustment so that the claim payment amount equals the sum of the payable line item payments.
5. Select an adjustment type for the line item from the **Adjustment Type** drop-down list and type the adjustment amount in the **Amount** text box. You cannot enter additional adjustments if you select Biller Review, Bill to Patient, or Write Off from the Adjustment Type drop-down list.

The following table describes the adjustment types.

Adjustment Type	Description
Adjustment	Performs an adjustment to the line item similar to adjustments made in the Claim Detail window. Allows you to change the outstanding receivable. Depending on the final outstanding receivable amount, the adjustment changes the line item status to Underpaid, Fully Paid, or Overpaid. If your company uses the General Ledger, a combination of the adjustment, reason code, and debit/credit can be mapped to a GL entry.
Bill to Insurance	Transfers the receivable amount entered to a secondary insurance carrier and creates a new claim. The receivable of the original line item is adjusted by the transfer amount and entered as the receivable for the line item on the new claim.
Bill to Patient	Transfers the amount in the Remaining column from the carrier to the patient. Performs the same action as clicking the Ready to Bill Patient button in the Claim Detail window.

Adjustment Type	Description
Billor Review	Adds a marker to indicate that another biller needs to review the claim after the payment is applied.
Rejections	Changes the line item status to Rejected if the payment amount is \$0.
Write Off	Performs a write off to the line item similar to write offs in the Claim Detail window. Allows you to change the outstanding receivable. Changes the line items status to Written Off. If your company uses the General Ledger, a combination of the write off, reason code, and debit/credit can be mapped to a GL entry.

- Type a comment or patient note in the provided text boxes, if needed.
- Click **+ Add More** to record additional adjustments, if needed.
- Repeat the process for each additional adjustment, up to three total adjustments for the line item.

**Claim Adjustments** [Back to Remittance Details](#)

Claim Number: 1333    Insured ID/SSN: 54445    Carrier: Davis Vision    Insurance Paid: \$1.00  
 Order Number: 202378    Patient Name: Chris Amedee    Plan: Acn (davis)    Patient Paid: \$103.02  
 Authorization Number: 54455    Service Date: 8/7/2013    Payment Status: Processed as Primary    Patient Due: \$0.00  
 Remittance #: 86240637    Billing Date: 8/30/2017    Office: Test Office 999    Outstanding Receivable: \$182.00  
 Provider: Demo Demo    \* Payment Amount: \$33.00

Remittance Record

Procedure Code	Status	Quantity	Retail Price	Outstanding Receivable	Payment Amount	Remaining
V2020	Underpaid	1	\$209.00	\$113.00	43.00	\$70.00
Adjustment Type		Select				
Comment		For office use only				
<a href="#">Remove</a>						
V2100	Underpaid	2	\$40.00	\$40.00	10.00	\$30.00
Adjustment Type		Select				
Comment		For office use only				
<a href="#">Remove</a>						
V2784	Billed <input checked="" type="checkbox"/>	2	\$50.00	\$29.00	-20.00	\$49.00
Adjustment Type		Select				
Comment		For office use only				
<a href="#">Remove</a>						

Total Payment: **\$33.00**    Total Adjustment: **\$0.00**    Total Remaining: **\$149.00**

[Cancel](#)    [Reset](#)    [Save](#)    [Save & Continue](#)

- Click **Save** after your finish posting payments for the claim to return to the Remittance Details window or click **Save & Continue** to navigate to the next claim in the Not Applied tab.

Eyefinity Practice Management posts the payment and moves the claim to the Applied tab in the Remittance Details window.

### Posting Multiple Remittance Payments to a Claim

You can post multiple payments to a single claim in a remittance.

1. Open the Remittance Details window for a remittance.
2. Select the **Only show claims with multiple payments** check box to hide all the remaining claims for the remittance.

**NOTE** This check box displays only for remittances that include multiple payments for the same claim and allows you to process those payments first.

3. Click the **Multiple Payments** icon next to a claim in the **Claim Number** column.

Click to review the payments for this claim.

Select to hide claims without multiple payments.

Claim Number	Order Number	Service Date	Patient Name	Plan	Payment Status	Remaining Receivable	Payment Amount
125104	450088	09/17/2014	Kent, Clark	MEDICARE CEP PTAN 15	Processed as Secondary	\$0.00	\$26.82
125104	450088	09/17/2014	Kent, Clark	MEDICARE CEP PTAN 15	Reversal of Previous Payment	\$0.00	\$0.00
125104	450088	09/17/2014	Kent, Clark	MEDICARE CEP PTAN 15	Processed as Secondary	\$0.00	\$26.82

A review window opens with remittance details for the payments.

4. Click the **Plus** icon in the **Remit Details** column to review the remittance details for each payment.

**NOTE** The payments in the review window are listed in the order that they should be processed based on the claim payment status.

5. Click **Review** next to the payment you want to apply.

Click to show and hide remittance details.

Click to apply the payment and make adjustments.

We found multiple payments made to the same claim. Payment changes to one claim will impact other payments. It is recommended to review all payments before applying adjustments.

Remit Details	Claim	Order	Plan	Claim Payment Status	Payment Amount	
-	125104	450088	MEDICARE CEP PTAN 15	Reversal of Previous Payment	\$0.00	Review
Procedure Code	Description	Charge	Payment Amount	Reason Code	Remark Code	
1038F	Current Tobacco Non-user	\$0.00	\$0.00			
92014	Exam Comp. Established	(\$140.00)	\$0.00	CO-16 (\$140.00)	N4	
+	125104	450088	MEDICARE CEP PTAN 15	Processed as Secondary	\$26.82	Review
+	125104	450088	MEDICARE CEP PTAN 15	Processed as Secondary	\$26.82	Review

Close

The Claim Adjustments window opens for the payment.

6. Apply the payment and make any necessary claim adjustments.

- Click **Save and Continue** to navigate to the next payment.

**NOTE** When you apply multiple payments for the same claim, clicking Save and Continue takes you to the next payment listed in the review screen.

Click to reopen the review screen.

Click to review the next payment.

- Repeat the process to apply the remaining payments.

The Remittance Details window opens after you apply all payments for the claim.

- Deselect the **Only show claims with multiple payments** check box to show the remaining claims that need to be processed for the remittance.

### Making Remittance Adjustments

You can make remittance adjustments if the sum of the claim payments does not match the total payment amount for a remittance. For example, a remittance from VSP may include a Unity Savings bonus. Before you can post this remittance, you will need to create a remittance adjustment for the amount of the bonus.

- Open the Remittance Details window for a remittance. For more information, go to [“Opening and Navigating the Remittance Details Window” on page 7](#).
- Click **+ Remittance Adjustment**.

The Remittance Adjustment window opens.

3. Enter the information for the remittance adjustment and click **Save**.

The screenshot shows a form titled "Remittance Adjustment" with the following fields:

- \* Claim Number (text input)
- \* Service Date (calendar icon, value: 01/22/2018)
- \* Amount (text input)
- Patient First Name (text input)
- Patient Last Name (text input)
- Patient Date of Birth (calendar icon, value: mm/dd/yyyy)
- Insured ID (text input)
- Provider First Name (text input)
- Provider Last Name (text input)

At the bottom right, there are "Save" and "Cancel" buttons.

Eyefinity Practice Management adds the adjustment to the Remittance Adjustment tab.

**NOTE**

Click **Edit** to update remittance adjustment information or click **Delete** to delete the remittance adjustment.

The screenshot shows the "Remittance Details" page for claim #06240637. The page includes a navigation menu on the left with "Remittance Adjustments (1)" selected. The main content area displays claim information:

- Carrier: Davis Vision
- Status: In Review
- Number of Claims: 5
- Payment Type: 6-T
- Remit Date: 04/03/2018
- Payment Amount: \$1,944.32
- Deposit Date: Update
- Applied: \$50.00 (0 / 5)
- Unapplied: \$1,894.32
- Post Remittance button

Below this information is a table of Remittance Adjustments:

Claim Number	Patient Name	Amount	Action
Unity Savings		\$50.00	Edit Delete

At the bottom, it says "Showing 1 to 1 of 1 entries" and has a "Show 10" dropdown and pagination controls.



## Posting Remittance Payments to External Claims

You can post payments to external claims if you recently moved to Claims Management from another billing system.

1. Open the Remittance Details window for a remittance. For more information, go to [“Opening and Navigating the Remittance Details Window” on page 7](#).
2. Open the Post External Claim window using one of the following methods:
  - Click the link in the **Claim Number** column for a claim with (E) displayed.

**NOTE** When a claim included in a remittance cannot be matched to a claim in Claims Management, an (E) displays next to the claim number to indicate the claim is an external claim.

Claim Number	Order Number	Service Date	Patient Name	Plan	Payment Status	Remaining Receivable	Payment Amount
1333	202379	09/07/2013	AMEDEE, CHRIS	ACN (DAVIS)	Processed as Primary	\$182.00	\$33.00
8578946600 (E)	201445	07/11/2013	Dahleen, Callie	ACN (DAVIS)	Processed as Primary	\$179.00	\$309.00

- Click the **Find Claim** icon next to a **Claim Number** and then click **Post External** at the bottom of the Find Claim window that opens.

**NOTE** Use this method when you want the payment posted to an external claim even though the system matched the claim number to one found in Claims Management.

Claim Number	Order Number	Service Date	Patient Name	Plan	Payment Status	Remaining Receivable	Payment Amount
1333	202379	09/07/2013	AMEDEE, CHRIS	ACN (DAVIS)	Processed as Primary	\$182.00	\$33.00
8578946600 (E)	201445	07/11/2013	Dahleen, Callie	ACN (DAVIS)	Processed as Primary	\$179.00	\$309.00

3. Update the information in the Post External Claim window, as needed.

Post External Claim

\* Claim Number: 123456789

\* Service Date: 04/03/2016

\* Amount: 33.00

Patient First Name: CHRIS

Patient Last Name: AMEDEE

Patient Date of Birth: mm/dd/yyyy

Insured ID: 720997

Provider First Name: Simon

Provider Last Name: Douglas

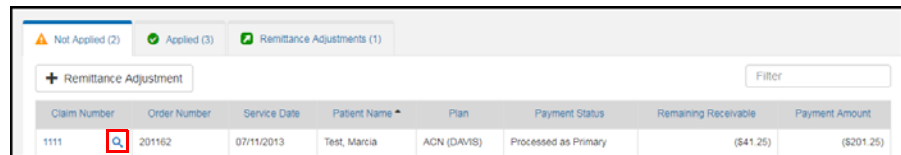
Save Cancel

4. Click **Save**.  
Eyefinity Practice Management posts the payment and moves the claim to the Applied tab.

## Updating Claims for Payments

You can update the claim associated with a remittance payment if you need to apply the payment to a different claim.

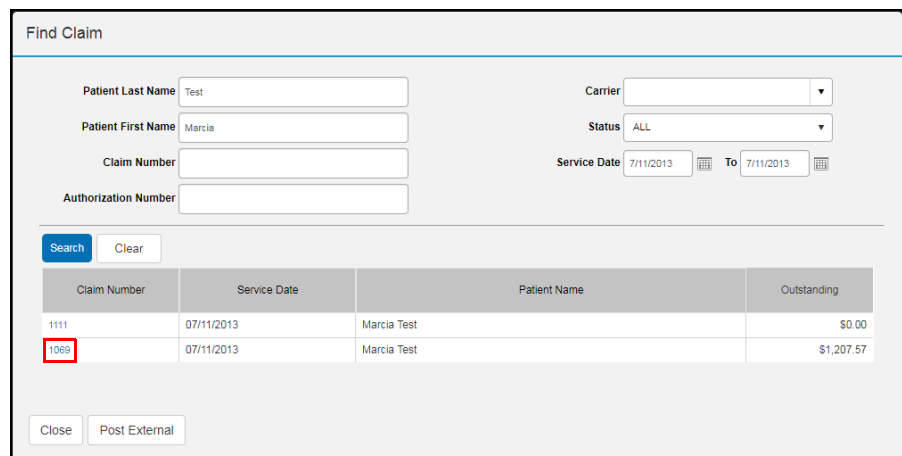
1. Open the Remittance Details window for a remittance. For more information, go to [“Opening and Navigating the Remittance Details Window” on page 7](#).
2. Click the **Find Claim** icon next to a claim in the **Claim Number** column.



Claim Number	Order Number	Service Date	Patient Name	Plan	Payment Status	Remaining Receivable	Payment Amount
1111	201162	07/11/2013	Test, Marcia	ACN (DAVIS)	Processed as Primary	(\$41.25)	(\$201.25)

The Find Claim window opens.

3. Enter information for the claim you want to find and click **Search**.
4. Click the link for the claim you want to match to the payment in the search results.



Find Claim

Patient Last Name: Test  
Patient First Name: Marcia  
Claim Number:   
Authorization Number:   
Carrier:   
Status: ALL  
Service Date: 7/11/2013 To 7/11/2013

Search Clear

Claim Number	Service Date	Patient Name	Outstanding
1111	07/11/2013	Marcia Test	\$0.00
1089	07/11/2013	Marcia Test	\$1,207.57

Close Post External

A confirmation dialog box opens.

5. Click **Yes**.

The system updates the claim associated with the payment.

## Reviewing Nonmatching Claim Information

In the Claim Adjustments window, an indicator appears if the claim information in Billing does not match the claim information from the remittance. You can review the nonmatching information. If necessary, you can apply the payment to a different claim.

1. Open the Remittance Details window for a remittance. For more information, go to [“Opening and Navigating the Remittance Details Window” on page 7](#).
2. Click the link for a claim in the **Claim Number** column.

The Claim Adjustment window opens.

- Click the indicator that appears next to the nonmatching claim information.

The screenshot shows the 'Claim Adjustments' window with the following data:

Claim Number: 2758	Insured ID/SSN: 123123	Carrier: Vsp	Insurance Paid: \$0.00
Order Number: 205979	Patient Name: 718170007	This information does not match between Remittance and System. Click to learn more.	
Authorization Number: 11111111	Service Date: 10/15/2014	Payment Status: Processed as Primary	Patient Paid: \$301.03
Remittance Number: 31160039	Billing Date:	Office: The Test Office 999	Patient Due: \$0.00
	Provider: Demo Demo	Outstanding Receivable: (\$15.00)	* Payment Amount: 25.00

A window opens that shows the nonmatching information.

The dialog box contains the following information:

Remittance View EOP		System Information	
Carrier	VSP	Vsp	
Insured ID/SSN	721586	123123	

Buttons: Cancel, Find Claim

- To apply the payment to a different claim, click **Find Claim** and select the new claim in the Find Claim window. For more information, see [“Updating Claims for Payments”](#) on page 18.

### Removing Payments

You can remove the payment posted to a claim for a remittance in the Ready to Review or In Review status. Claim adjustments or line item status updates are reverted when you remove the payment posted to a claim.

- Open the Remittance Details window for a remittance. For more information, go to [“Opening and Navigating the Remittance Details Window”](#) on page 7.
- Select the **Applied** tab.
- Click the **Remove** icon in the **Claim Number** column next to the payment you want to remove.

The screenshot shows the 'Remittance Details - #96240637' window. The 'Applied' tab is selected. The table below shows the remittance adjustments:

Claim Number	Order Number	Service Date	Patient Name	Plan	Payment Status	Remaining Receivable	Payment Amount
1333	202378	09/07/2013	AMEDEE, CHRIS	ACN (DA/RS)	Processed as Primary	\$149.00	\$33.00

The 'Remove' icon (a red square with a white minus sign) is highlighted in the 'Claim Number' column for the first row.

A review window opens with remittance details for the payments.

4. Click **Yes**.

Are you sure you want to remove the applied payment on this claim?

Remit Details	Claim	Order	Plan	Claim Payment Status	Payment Amount
<b>+</b>	1333	202378	ACN (DAVIS)	Processed as Primary	\$33.00

**NOTES**

- Click the Plus icon in the Remit Details column to review the remittance details for the payment.
- If you remove a payment posted to a claim with multiple payments applied, any payments applied after the payment being removed also displays in the review window and will also be removed.

Eyefinity Practice Management removes the payment and moves the claim back to the Not Applied tab.

**Posting Remittances**

After you process all the claims for a remittance and apply the entire payment amount, you can post the remittance from the Remittance Details window.

1. Open the Remittance Details window for a remittance. For more information, go to [“Opening and Navigating the Remittance Details Window” on page 7.](#)
2. Click **Post Remittance**.

**NOTE**

You can only click the Post Remittance button if all the claims for the remittance have been applied and the outstanding amount displayed above the status bar is \$0.

Back to Remittance List Remittance Details - #06240637

Carrier: Davis Vision Status: In Review  
 Number of Claims: 5 Payment Type: EFT  
 Remit Date: 04/03/2018 Payment Amount: \$1,944.32  
 Deposit Date: Update

Applied \$1,944.32 Unapplied \$0.00

Not Applied (0) Applied (5) Remittance Adjustments (0)

+ Remittance Adjustment Filter

Claim Number	Order Number	Service Date	Patient Name	Plan	Payment Status	Remaining Receivable	Payment Amount
1333	202378	09/07/2013	AMEEIE, CHRIS	ACN (DAVIS)	Processed as Primary	\$149.00	\$33.00
1147	201445	07/11/2013	Daniela, Celia	ACN (DAVIS)	Processed as Primary	(\$130.00)	\$309.00
1111	201162	07/11/2013	Test, Marcia	ACN (DAVIS)	Processed as Primary	\$160.00	(\$201.25)
1069	201162	07/11/2013	Test, Marcia	ACN (DAVIS)	Processed as Primary	(\$100.00)	\$1,307.57
1140	201320	07/11/2013	Zaff, Lauren	ACN (DAVIS)	Processed as Primary	(\$220.00)	\$496.00

Showing 1 to 5 of 5 entries Show 10 < 1 >

Eyefinity Practice Management posts payments for the remittance and changes the status to Posted. If the remittance includes more than 150 claims, Eyefinity Practice Management assigns a temporary Posting status to the remittance and posts payments for the remittance at a scheduled time as part of an integration. After posting the payments, Eyefinity Practice Management changes the status of the remittance to Posted.

## Reviewing Errors

This section tells you how to review and address remittance errors.

Topics include:

- [Reviewing Duplicate Remittance Errors, 21](#)
- [Reviewing Remittance Posting Errors, 22](#)
- [Reviewing Remittance Download Errors, 23](#)

### Reviewing Duplicate Remittance Errors

Duplicate remittance errors occur when a remittance is downloaded that has the same carrier name, payment amount, and check number as an existing carrier payment. Error messages display in the Electronic Remittance Payment and Remittance Details windows for remittances with duplicate errors.

**NOTE** Eyefinity recommends that you delete duplicate remittances in the Electronic Remittance Payment window and process the payments in the Carrier Payment window. For more information about deleting remittances, go to [“Deleting Remittances” on page 24](#).

1. From Claims Management, click **Process Payments** and select **Electronic Remittance Payment**.  
The Electronic Remittance Payment window opens.
2. Select the **Ready to Review** or **In Review** status filters. An error indicator displays next to the status filters when there are errors. The number that displays in red represents the number of remittances with errors.
3. Review the remittances with errors. An error message displays under the remittances with errors.

The screenshot shows the 'Electronic Remittance Payment' window. On the left, there are filters for 'Ready to Review (504)', 'In Review (23)', 'Posting (2)', and 'Posted (30)'. Below these are 'Downloads' and 'Processing Error (361)'. The main area has search fields for 'Carrier' (set to VSP), 'Remittance #', 'Payer ID', and 'Remit Date'. A table below shows two remittance entries. The first entry, with Remittance # 90812583, is highlighted in red and has an error message: 'Carrier Payment with Remittance # 90812583 already exists in the system.' The second entry, with Remittance # 9080669, is not highlighted.

	Remittance #	Carrier	Payer ID	Remit Date	Claims	Payment Amount	Applied Amount	Unapplied Amount
<input checked="" type="checkbox"/>	90812583	VSP	680450459	01/10/2014	6	\$188.57	\$0.00	\$188.57
Carrier Payment with Remittance # 90812583 already exists in the system.								
<input checked="" type="checkbox"/>	9080669	VSP	680450459	02/20/2014	9	\$505.98	\$0.00	\$505.98

## Reviewing Remittance Posting Errors

Remittance posting errors occur when the payment applied to a claim in a remittance cannot be posted. Error messages display in the Electronic Remittance Payment and Remittance Details windows for remittances with posting errors.

1. From Claims Management, click **Process Payments** and select **Electronic Remittance Payment**.

The Electronic Remittance Payment window opens.

2. Select the **Posting** status filter. An error indicator displays next to the Posting status filter when there are posting errors. The number that displays in red represents the number of remittances with errors.
3. Click the link for a remittance with an error in the **Remittance #** column. An error message displays under the remittances with errors.

Remittance #	Carrier	Payer ID	Remit Date	Claims	Payment Amount	Applied Amount	Unapplied Amount
82382023	Medicare DME	111111	03/27/2018	5	\$673.56	\$254.71	\$118.85

The Remittance Details window opens with the **Not Applied** tab displayed.

4. Click the link for a claim with an error in the **Claim Number** column to resolve the error in the Claim Adjustment window. An error message displays under the claims with errors that need to be resolved.

Claim Number	Order Number	Service Date	Patient Name	Plan	Payment Status	Remaining Receivable	Payment Amount
311	201455	03/21/2013	Benford, Jerry	MEDICARE DME (POST-CATARACT HARDWARE)	Processed as Primary	\$168.85	\$118.85

5. Save the claim after you resolve the error.

Eyefinity Practice Management posts the payment and moves the claim to the **Applied** tab

6. Repeat the process for each claim with an error.

After you resolve all of the posting errors for the remittance, Eyefinity Practice Management posts the remittance automatically.

## Reviewing Remittance Download Errors

Remittance download errors occur when remittances cannot be downloaded from a carrier you have set up. The errors can occur due to incorrect or missing credentials or incorrectly configured carrier information. You can review a list of remittance download errors for more information about the errors that occurred. After reviewing the errors, you can dismiss them or retry a download after correcting an issue.

1. From Claims Management, click **Process Payments** and select **Electronic Remittance Payment**.

The Electronic Remittance Payment window opens.

2. Select **Processing Error**.

The screenshot shows the 'Electronic Remittance Payment' window. On the left sidebar, the 'Downloads' section is expanded, and 'Processing Error (94)' is selected. The main area displays a table of errors with columns: Remittance #, Carrier, Payer ID, Remit Date, Claims, Payment Amount, Applied Amount, and Unapplied Amount. The table contains five rows of error data.

Remittance #	Carrier	Payer ID	Remit Date	Claims	Payment Amount	Applied Amount	Unapplied Amount
5535917	Spectera (OptumHealth Vision)	55555	04/03/2018	5	(\$87.00)	(\$84.00)	(\$23.00)
7798073	PTA Insurance	5555	04/03/2018	5	\$1,242.00	\$619.00	\$723.00
6024037	Davis Vision	12345	04/03/2018	5	\$1,944.32	\$342.00	\$1,602.32
1188513	AETNA	456	04/03/2018	5	\$211.51	(\$135.00)	\$346.51
9832991	Medicare Part B	56335	04/03/2018	5	\$985.27	\$78.73	\$906.54

A list of errors display.

3. Perform one of the following actions:
  - Click **Dismiss** after reviewing an error message to delete the error.
  - Click **Retry** after correcting an issue to attempt to resolve the error.

If the error is successfully resolved, the remittance status is changed to Ready to Review and it no longer appears in the list of errors. If the system is unable to match the payerid on the remittance with a carrier, you will be asked to select a carrier.

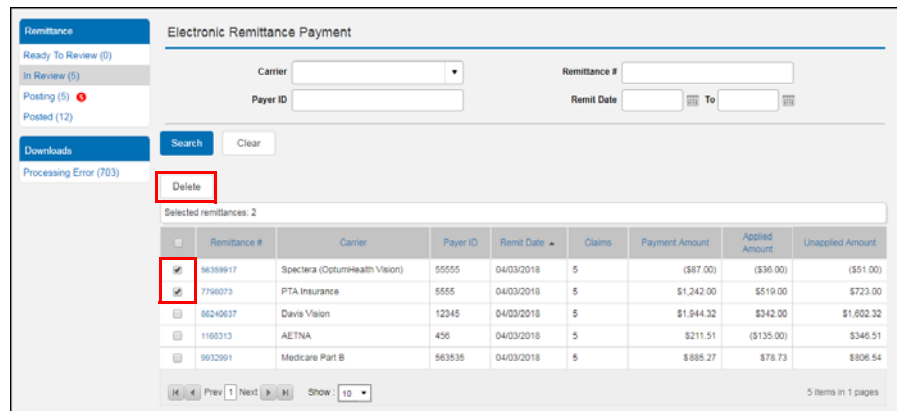
The screenshot shows the 'Electronic Remittance Payment' window with the 'Processing Error (703)' selected. The main area displays a table of error messages with columns: Date and Message. The table contains seven rows of error messages.

Date	Message
5/4/2018 1:30:26 AM	No remittances were available to download. <a href="#">Dismiss</a>
5/3/2018 8:21:17 AM	Remittance# C14297E45118190, Payer G00521 (BLUECROSS BLUESHIELD OF ILLINOIS) cannot be processed. Duplicate Claim ID found on the remittance. <a href="#">Dismiss</a>
5/3/2018 1:30:32 AM	No remittances were available to download. <a href="#">Dismiss</a>
5/1/2018 1:30:30 AM	No remittances were available to download. <a href="#">Dismiss</a>
4/30/2018 2:14:55 PM	No remittances were available to download. <a href="#">Dismiss</a>
4/30/2018 2:11:54 PM	Remittance file data already exists. File Name is 835.20170523.095637.19763545.835. <a href="#">Dismiss</a>
4/30/2018 1:46:31 PM	VSP remittances could not be downloaded. Verify that your VSP username and password are entered for one or more offices to download remittances. <a href="#">Dismiss</a>
4/30/2018 1:38:07 PM	Remittances could not be downloaded from TriZetto. Verify that your TriZetto Gateway EDI Site ID is entered for one or more offices to download remittances. <a href="#">Dismiss</a>

## Deleting Remittances

You can delete remittances with the Ready To Review or In Review status. The remittances you delete are removed from Eyefinity Practice Management and no longer appear in search results.

1. Search for remittances with the Ready To Review or In Review status. For more information on searching for remittances, go to [“Searching for Remittances”](#) on page 6.
2. Select the check boxes for the remittances you want to delete and click **Delete**.



A confirmation dialog box opens.

3. Click **Yes, Delete Remittances** to continue.  
Eyefinity Practice Management deletes the remittance.