Therapy Brands

TheraNest Lite	Reconciling the Ledger with Apex Feature Guide	TheraNest Professional
Summary:	**Details:**	**Educational Links:**
Claims Process Summary	1. Submit claim by checking the appropriate check boxes and clicking the green "Submit Selected Claims" button 2. You can check the Status of the Claims by Navigating to Billing>Claims> and clicking on the various tabs (claim is either accepted or rejected by payer) 3. If rejected, correct and resubmit 4. When accepted, ERA payment is received from the Payer	TheraNest Claims Process Overview Apex Payer ID List
Payment Reconciliation: Auto Processing	**Auto Processing:** If the ERA is Auto-Processed it will move automatically to the paid and processed tab. The ERA will be automatically processed if: • The ERA payment was received without any adjustments. • The ERA payment was received were the only adjustments were Patient Responsibility or Contractual Obligation. • If the adjustment was Patient Responsibility (PR-1, PR-2, or PR-3), an invoice adjustment will be created, and the amount will be shifted to the client.	Process ERA Payments Automatic Write-offs Accept Insurance Payment Create or Remove a Write-Off
Claims Service Settings	You have the option to turn on Auto Processing by accessing Organization Tab>Claims Service on the left side menu and then selecting settings. You can toggle the switch to On or Off. If auto processing is on, once you receive the ERA, TheraNest will auto-process ERAs that match certain criteria.	Enable Auto Processing

Payment Reconciliation: Manual Process	**Manually Process ERAs:** Process Individual Payments Billing> Claims > ERA Received > set date range > Actions> [Select one of the following: 1. **Process Payment**: applies the payment to the invoice and you will need to manually add adjustments. 2. **Process Payment and Write Off Balance**: adds the payment to the invoice and applies a write off for the remaining balance. 3. **Process Payments and Adjustments**: adds payment to invoice and applies any adjustments. Process Multiple Payments: Billing > Claims > ERA Received> set date range> select checkboxes for applicable payments> Process Payments Button Resolve a Mismatch: Click actions drop-down of the appropriate claim and selecting “Resolve a Mismatch” applicable payments> Process Payments Button	Process ERA Payments Accept Insurance Payment Create or Remove a Write-Off

If you do not receive ERAs	If not enrolled in ERA or pending ERA enrollment, you can manually post the client and/or insurance payment. The claim will remain on the "accepted tab" until you manually move it to the paid and processed tabs. Once you receive the paper EOB and remittance you will need to manually accept payments and add adjustments. Billing>Accepted tab> Actions> View Invoice details +Add Adjustments manually + Add Write-Offs Manually Save and Accept Payments (indicate if it's insurance/client) Once you have manually applied all payments, adjustments and write-offs move the claim to the paid and process tab by: Billing>Accepted>Update Status>Paid and Processed	Accept Invoice Payments and Copays Accept Insurance Payment Create or Remove a Write-Off
Submitting a Claim to Secondary Insurance	After the primary insurance is billed, the remaining balance will show as Insurance Amount Due for the secondary insurance and will not be the patient's responsibility. Locate Client>open details>Client Ledger>Actions>Add to Claims Awaiting Submission>Use Secondary Insurance	Submit to Secondary Insurance Claim Adjustments for Submitting to Secondary Insurance Providers
Summary:	1. If the ERA is Auto-Processed it will move automatically to the paid and processed tab. 2. If the ERA doesn't Auto-Post you can Process Payments and Adjustments by going to the ERA Received Tab, locate the ERA, Click Actions> select appropriate action	