

Post Insurance Payment and Transfer Balance to Another Payer or Patient

## Setting up a Transfer Code:

- If you need to set up a Transfer Code, the code can be created from Accounts Receivable > Pay/Adj Codes tab:
- Enter the Program number.
- Select **Show Available Codes tab**, to get the next available number. Choose the Code you want to use, and it will appear in the Code field.
- Type in a Description. For example: "Transfer to Medicaid"
- Type in **A** for Adjustment.
- Click on **Save**.

## Print A New Statement:

- **Barnestorm Office > Accounts Receivable > Reports.**
- Select **05.37 Balance Forward Statement.**
- Enter the patient/billing information.
- If you have multiple payers, and you want both to appear on the statement, select the box beside Allow Multiple payers, select those payers.
- (Optional) Check the option for **Print Balance Forward.**
- You also have the option to edit/change the statement trailer text before printing off your statement.
- Click **Print** to print your statement.

**NOTE-FOR PPS PAYERS ONLY:** If this is a PPS payer, and the deductible/coinsurance was **only** applied to the claim (and **no** payer payment made), you will need to do an additional step to clear the episode from PPS Tracking and mark the episode as Cancelled. Once you've followed steps above to post the coinsurance/deductible amount, continue with these steps below:

- Go to Billing > PPS Billing > Edit PPS Episodes.
- Type in the chart number/patient name, and select the appropriate episode.
- On the far right, select the **Patient Deductible** bullet. This will time

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- stamp the episode as Paid (at \$0), based on your date of entry.
- You will receive a popup: "Do you want to mark this episode as Paid?"
- Click **Yes**
- Click **Save These Status Changes** button. Your episode is now marked as PAID \$0.

Knowledgebase

<http://kb.barnestorm.biz/KnowledgebaseArticle50156.aspx>