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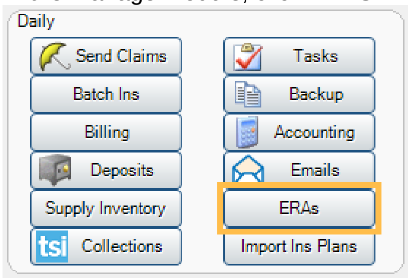
ERAs: A Step-by-Step Guide

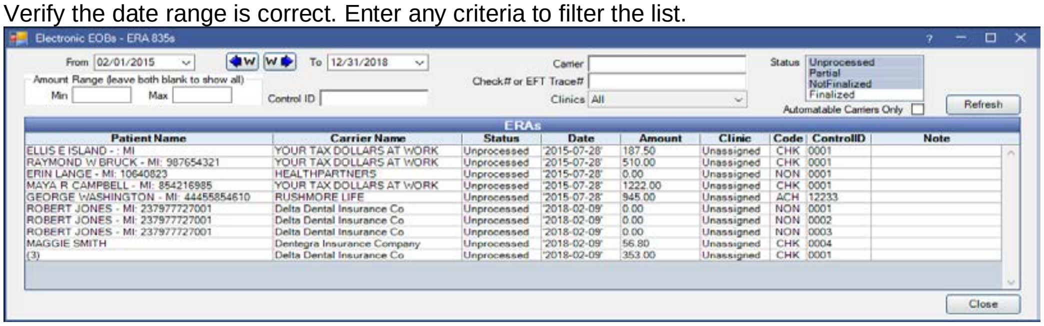
Manually Processing ERAs

Follow this process when manually processing ERAs.
This is required when *Review All* is set for ERA Automation in Manage Module Preferences.

1. In the Manage Module, click **ERAs**.

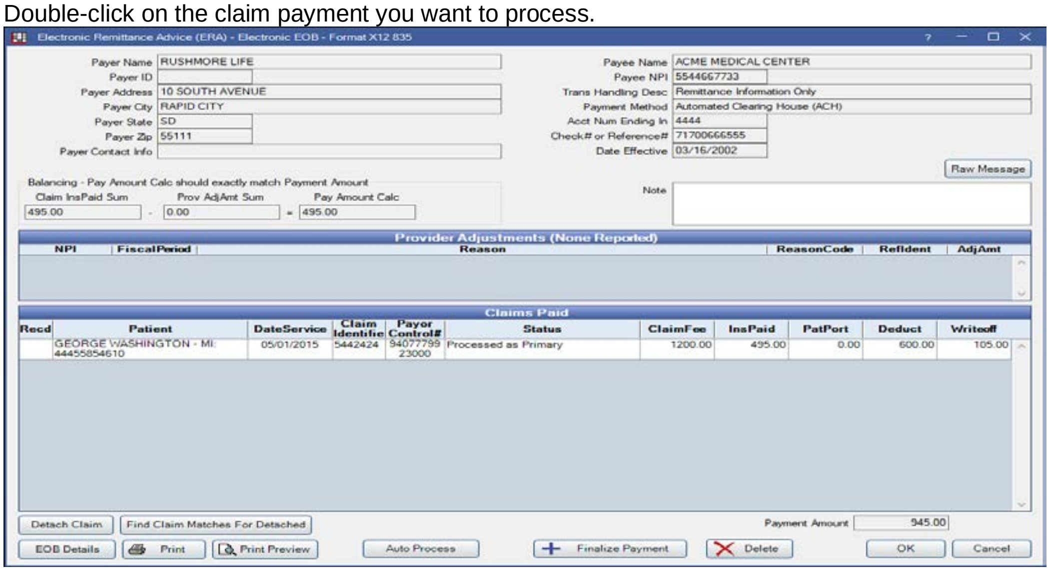


2. Verify the date range is correct. Enter any criteria to filter the list.



3. Double-click on an ERA to see the attached claim payments.

4. Double-click on the claim payment you want to process.



5. Verify the amount that is being entered is correct and click **OK**.

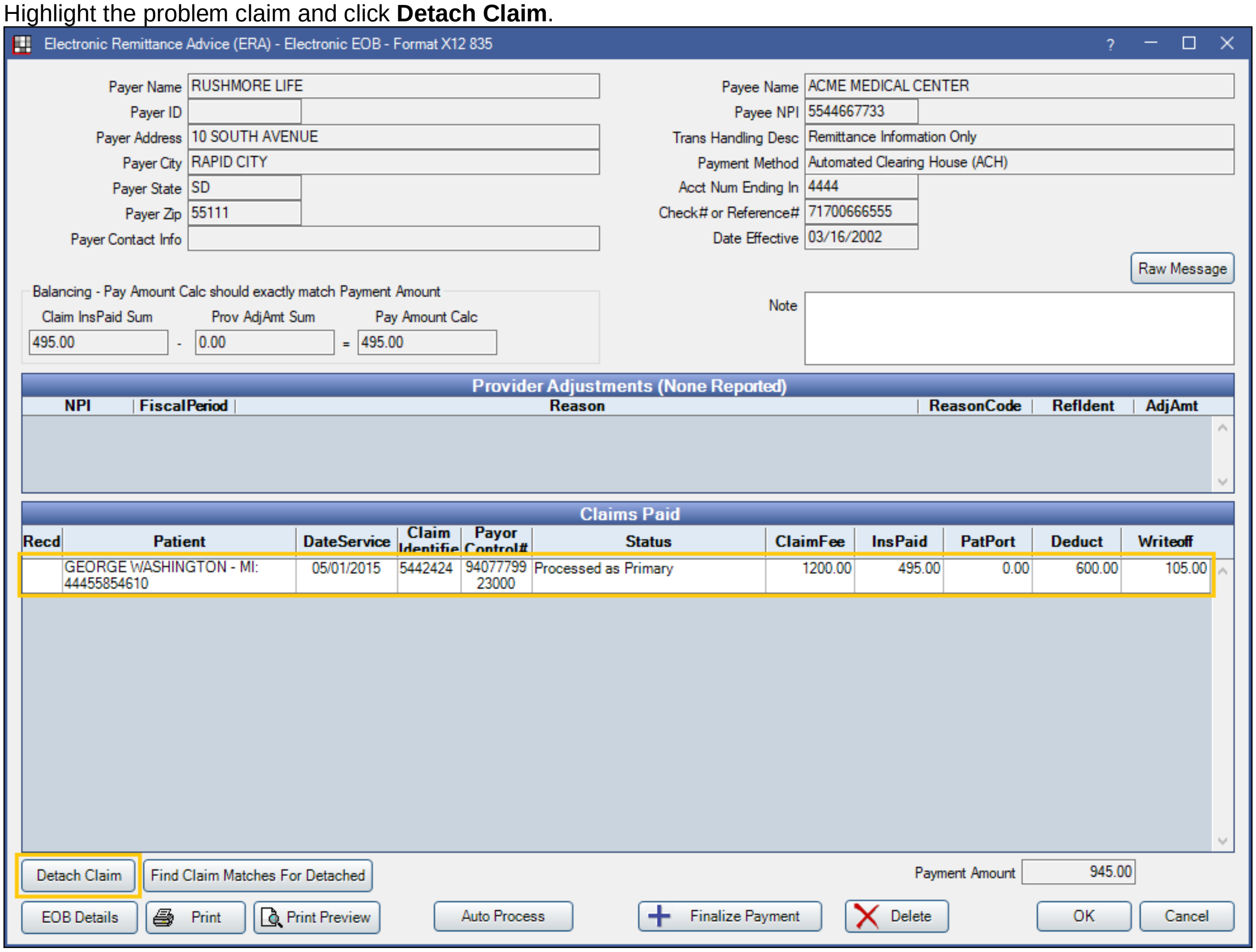
6. Repeat previous step for any remaining claims.
7. Once all claims in the ERA are marked as *Received*, click **Finalize Payment**.

   Note: If a claim payment is missing the X in the Recd column, continue with the steps below to detach the claim and finalize the payment outside the ERA window.

Detaching a Claim

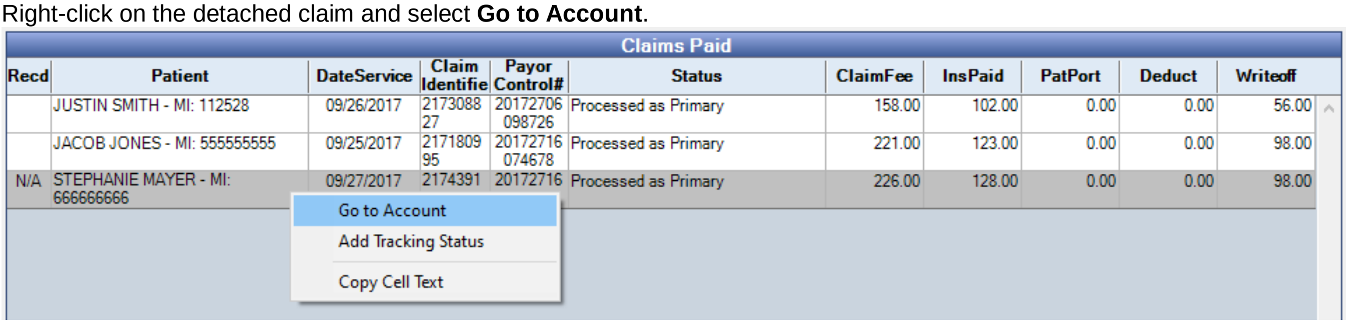
If you cannot process the claim in the ERA window, you can detach it and enter the payment information in the claim manually.

1. Highlight the problem claim and click **Detach Claim**.



N/A will appear in the *Recd* column to indicate it has been detached from the ERA.

2. Right-click on the detached claim and select **Go to Account**.



3. From the Account Module, add payment details (if not previously entered) and receive the claims as normal.

4. Repeat steps 1-3 above as needed for any other claims that need to be detached from an ERA. After all the claims on an ERA are Received with an *X* or detached with an *N/A*, finalize the payment.

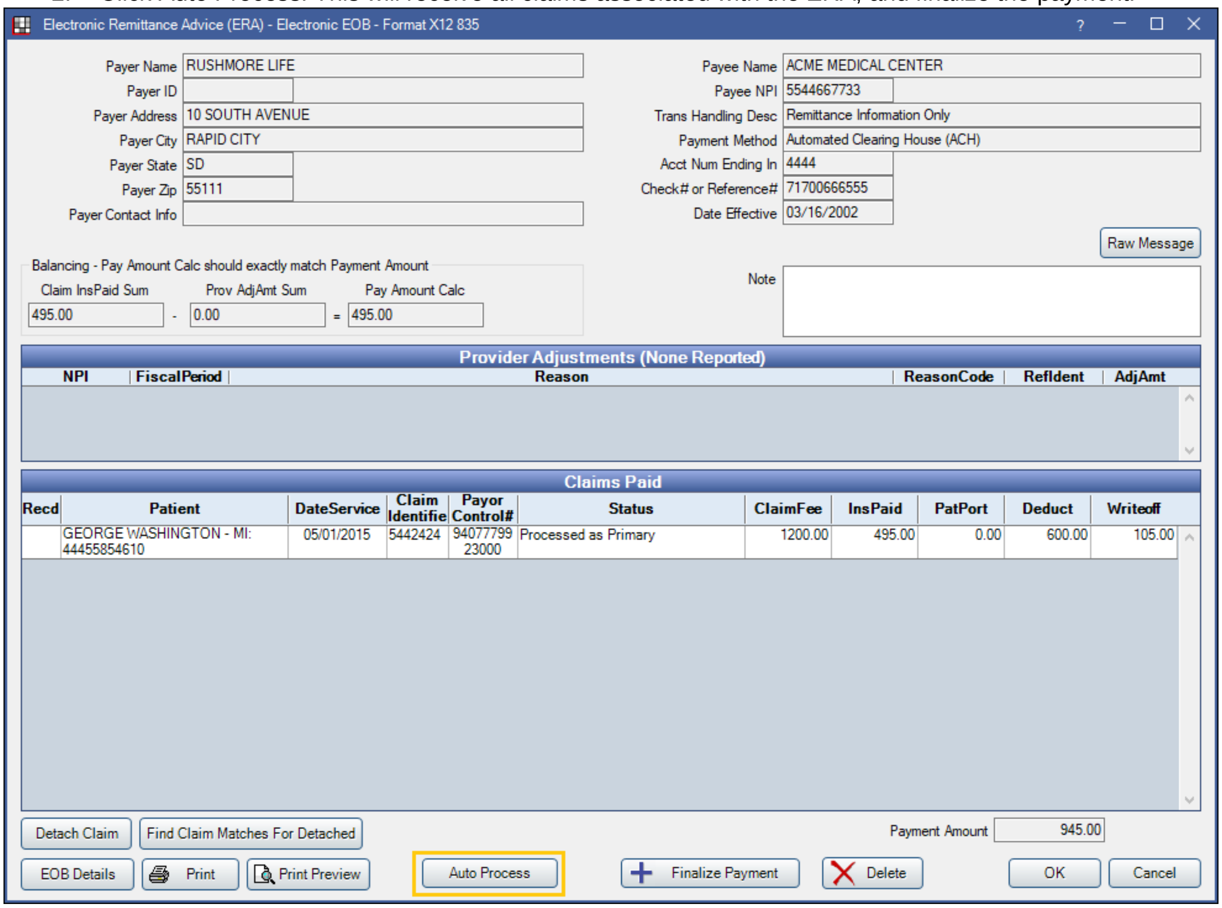
Note: To finalize payment for an ERA with a detached claim, double-click on any claim in the Account Module. Click **Batch** and follow the normal process to finalize payments. Once all claim payments have been processed or detached, and all claims (including $0 payments) have been attached to the batch check, the status of the ERA will change to *Finalized**. The asterix (*****) identifies ERAs with detached claims.

Semi-Automatic ERA Processing

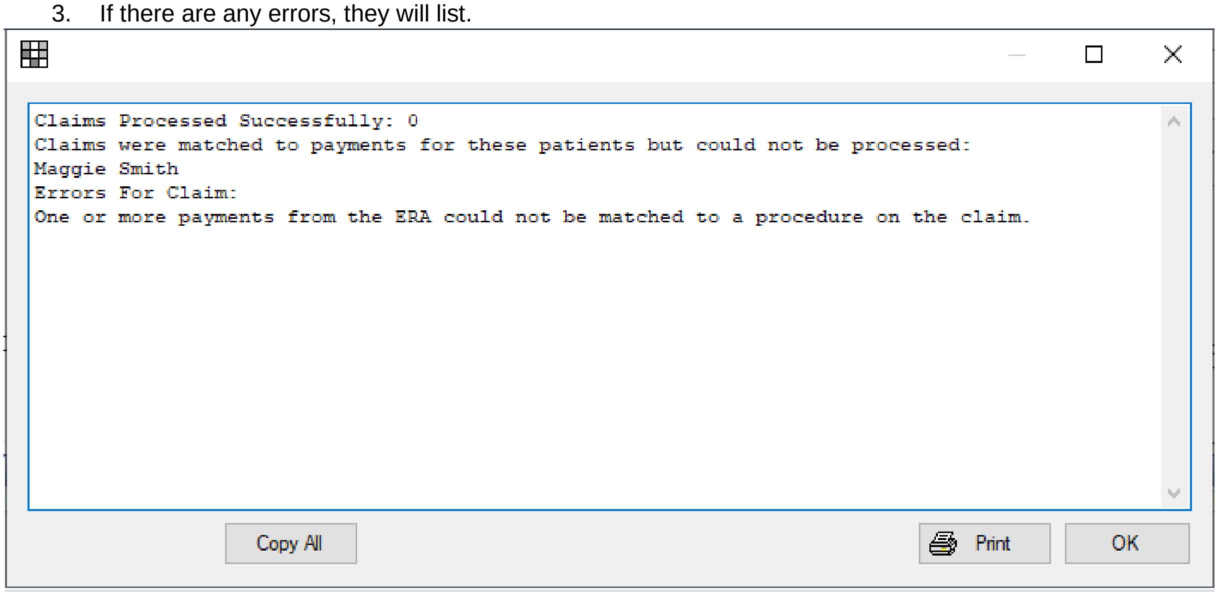
NOTE: Automatic and Semi-Automatic ERA Processing is temporarily disabled.

When *Semi-Automatic* ERA Automation is selected in Manage Module Preferences, follow these steps for processing.

1. In the ERAs window, double-click on an ERA to see the claim payments attached.
2. Click Auto Process. This will receive all claims associated with the ERA, and finalize the payment.



3. If there are any errors, they will list.



4. Correct any errors as needed. Click Auto Process again. If necessary, Detach Claim. See above.

Automatic ERA Processing

NOTE: Automatic and Semi-Automatic ERA Processing is temporarily disabled.

When fully-automatic processing is turned on in Manage Module Preferences, Open Dental will match claims from the database to the claims on the ERA without any work required from the office.

1. In the ERAs window, next to each ERA a note will indicate if the ERA processed automatically. It will also indicate any failed attempts.
2. For ERAs that failed to auto process, double-click into them on the Electronic EOBs window and click the Auto Process button (see Semi-Automatic ERA processing above).

Automatic ERA Processing does:

- Match claims from the database to claims on the ERA. This will also reassociate claims that were manually detached from an ERA using the Detach Claim button on the ERA window.
- Apply the payment for the claim to an insurance payment plan if only one valid payment plan for the claim is found.
    - If multiple valid payment plans are found, the claim must be processed manually so that a payment plan can be chosen by the user.
- Create claim snapshots if they are enabled.
- Attempt to process as many claims as possible. If an error is encountered while processing only one claim on an ERA, the system will receive the other claim payments and leave the ERA in a partially processed state without attempting the creation of the batch insurance payment.
    - An ERA may also be left in a NotFinalized state if all claims are processed, but an error was encountered when attempting to make the batch insurance payment. If errors are fixed and auto processing is attempted again, the system will skip any claims that have already been processed.
- Enter initial payments, supplemental payments, reversals, and preauthorizations. Claims and claim procedures will have their status changed appropriately and date received will be updated.
- Create a batch insurance payment for the ERA. The Carrier name, Check#, Type, Amount, and Clinic will be filled. The payment date will be set to the date it auto processes.
- Create an auto deposit if "*insurance payments show auto deposit*" is checked in Manage Module Preferences.

Automatic ERA Processing does not:

- Set the allowed override for claimprocs or update allowed fee schedules.
- Prompt the user to handle secondary claims when "*Prompt for secondary claims*" is checked in Account Module Preferences