

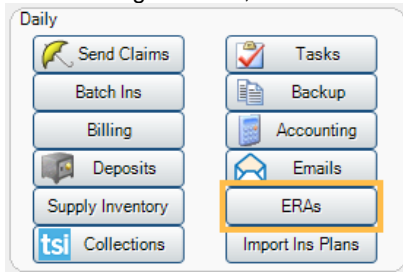
## ERAs: A Step-by-Step Guide

### Manually Processing ERAs

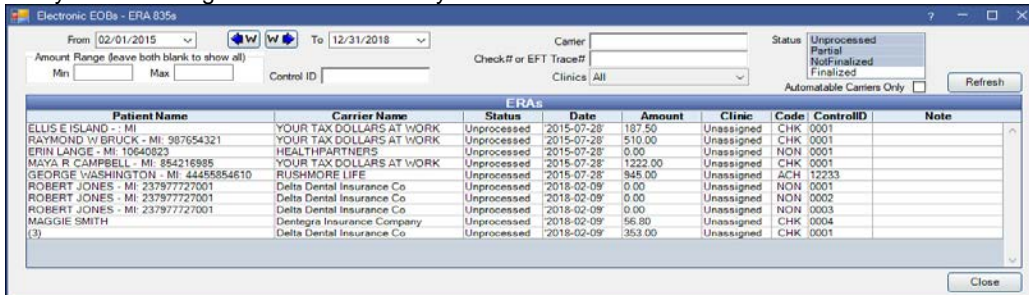
Follow this process when manually processing ERAs.

This is required when *Review All* is set for ERA Automation in Manage Module Preferences.

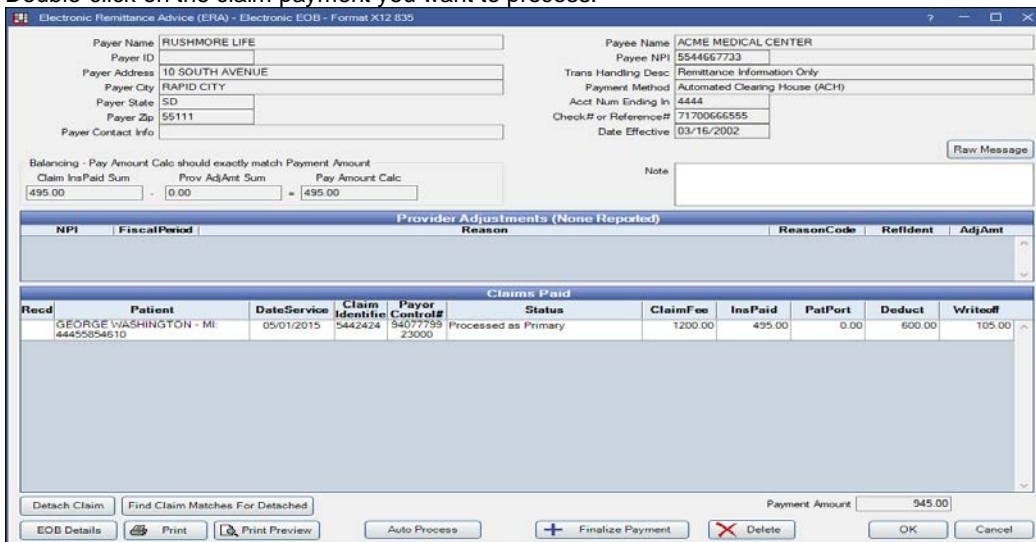
1. In the Manage Module, click **ERAs**.



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**.

Electronic Remittance Advice (ERA) - Electronic EOB - Format X12 835

Payer Name: RUSHMORE LIFE  
 Payer ID: [ ]  
 Payer Address: 10 SOUTH AVENUE  
 Payer City: RAPID CITY  
 Payer State: SD  
 Payer Zip: 55111  
 Payer Contact Info: [ ]

Payee Name: ACME MEDICAL CENTER  
 Payee NPI: 5544667733  
 Trans Handling Desc: Remittance Information Only  
 Payment Method: Automated Clearing House (ACH)  
 Acct Num Ending In: 4444  
 Check# or Reference#: 71700666555  
 Date Effective: 03/16/2002

Raw Message

Balancing - Pay Amount Calc should exactly match Payment Amount

Claim InsPaid Sum	Prov AdjAmt Sum	Pay Amount Calc
495.00	0.00	= 495.00

Note: [ ]

NPI	FiscalPeriod	Reason	ReasonCode	RefIdent	AdjAmt
Provider Adjustments (None Reported)					

Recd	Patient	DateService	Claim Identify	Payor Control#	Status	ClaimFee	InsPaid	PatPort	Deduct	Writeoff
	GEORGE WASHINGTON - MI: 44455854610	05/01/2015	5442424	94077799 23000	Processed as Primary	1200.00	495.00	0.00	600.00	105.00

Payment Amount: 945.00

Buttons: Detach Claim, Find Claim Matches For Detached, EOB Details, Print, Print Preview, Auto Process, Finalize Payment, Delete, OK, Cancel

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**.

Recd	Patient	DateService	Claim Identify	Payor Control#	Status	ClaimFee	InsPaid	PatPort	Deduct	Writeoff
	JUSTIN SMITH - MI: 112528	09/26/2017	2173088 27	20172706 098726	Processed as Primary	158.00	102.00	0.00	0.00	56.00
	JACOB JONES - MI: 555555555	09/25/2017	2171809 95	20172716 074678	Processed as Primary	221.00	123.00	0.00	0.00	98.00
N/A	STEPHANIE MAYER - MI: 666666666	09/27/2017	2174391	20172716	Processed as Primary	226.00	128.00	0.00	0.00	98.00

Context Menu: Go to Account, Add Tracking Status, Copy Cell Text

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 asterisk (\*) 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.

Electronic Remittance Advice (ERA) - Electronic EOB - Format X12 835

Payer Name: RUSHMORE LIFE  
Payer ID: [Empty]  
Payer Address: 10 SOUTH AVENUE  
Payer City: RAPID CITY  
Payer State: SD  
Payer Zip: 55111  
Payer Contact Info: [Empty]

Payee Name: ACME MEDICAL CENTER  
Payee NPI: 5544667733  
Trans Handling Desc: Remittance Information Only  
Payment Method: Automated Clearing House (ACH)  
Acct Num Ending In: 4444  
Check# or Reference#: 71700666555  
Date Effective: 03/16/2002

Raw Message

Balancing - Pay Amount Calc should exactly match Payment Amount

Claim InsPaid Sum	Prov AdjAmt Sum	Pay Amount Calc
495.00	0.00	= 495.00

Note: [Empty]

Provider Adjustments (None Reported)					
NPI	FiscalPeriod	Reason	ReasonCode	RefIdent	AdjAmt

Claims Paid										
Recd	Patient	DateService	Claim Identify	Payor Control#	Status	ClaimFee	InsPaid	PatPort	Deduct	Writeoff
	GEORGE WASHINGTON - MI: 44455854610	05/01/2015	5442424	94077799 23000	Processed as Primary	1200.00	495.00	0.00	600.00	105.00

Payment Amount: 945.00

Buttons: Detach Claim, Find Claim Matches For Detached, EOB Details, Print, Print Preview, **Auto Process**, Finalize Payment, Delete, OK, Cancel

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

Claims Processed Successfully: 0  
Claims were matched to payments for these patients but could not be processed:  
Maggie Smith  
Errors For Claim:  
One or more payments from the ERA could not be matched to a procedure on the claim.

Buttons: Copy All, Print, OK

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