

EPM Payment Statuses

Settled Moved to “Payer Name”

If the payment and/or adjustment entered is from the primary payer on the encounter, this status will move the remaining balance on the charge to the “Ins2 Amt” bucket in Balance Control. The encounter status changes to Rebill so a new claim is generated for the secondary payer during the next billing run.

If the payment and/or adjustment entered is from the secondary payer on the encounter, this status will move the remaining balance on the charge to the “Ins3 Amt” bucket in Balance Control. The encounter status changes to Rebill so a new claim is generated for the tertiary payer during the next billing run.

This status will default when the payment and/or adjustment entered is from the primary payer on the encounter and there is a secondary payer that does not have the “Crossover” checkbox marked in the Payers table. This status will also default when the payment and/or adjustment entered is from the secondary payer on the encounter and there is a tertiary payer.

Forwarded to “Payer Name”

If the payment and/or adjustment entered is from the primary payer on the encounter, this status will move the remaining balance on the charge to the “Ins2 Amt” bucket in Balance Control. The encounter status will remain as Billed so a new claim is not generated for the secondary payer during the next billing run.

This status will default when the payment and/or adjustment entered is from the primary payer on the encounter and there is a secondary payer that has the “Crossover” checkbox marked in the Payers table.

Settled Moved to Self

This status will move the remaining balance on the charge to the “Pat Amt” bucket in Balance Control. The encounter status will remain as Billed so a new claim is not generated during the next billing run. The remaining balance will be billed on the guarantor’s next statement.

This status will default when the payment and/or adjustment entered is from the primary, secondary, or tertiary payer on the encounter and there is no other payer to which the remaining balance can be settled.

Rebill

This status will leave the remaining balance on the charge in the current payer bucket in Balance Control. The encounter status will change to Rebill so a new claim is generated for the same payer during the next billing run. (Use when a charge should be rebilled to the same insurance)

Appeal

This status will leave the remaining balance on the charge in the current payer bucket in Balance Control. The encounter status will remain as Billed so a new claim is not generated during the next billing run.
(Use when the payment received for a charge should be appealed)

Deny

This status will leave the remaining balance on the charge in the current payer bucket in Balance Control. The encounter status will remain as Billed so a new claim is not generated during the next billing run.
(Use when a \$0.00 payment received for a charge should be appealed)

None

This status will leave the remaining balance on the charge in the current payer bucket in Balance Control. The encounter status will remain as Billed so a new claim is not generated during the next billing run.
(Use when secondary insurance pays before primary insurance or when there is an insurance overpayment and the credit should not be moved)