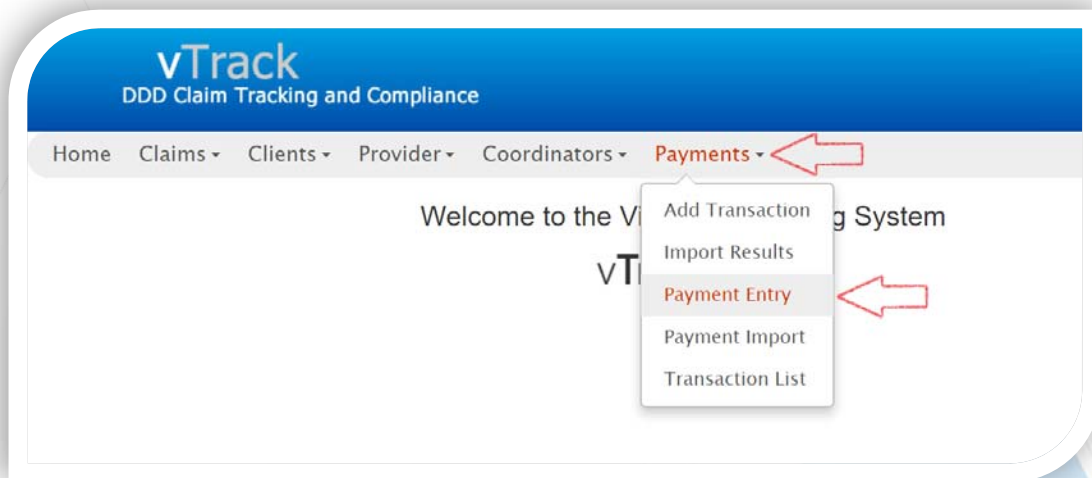


How to Use the Payment Entry Feature

- ❖ *In this tutorial we will show you how to do the following*
 - *Remove payments due to recoupments*
 - *Remove payments to post a new payment for reverse/rebills*
 - *Post payments for claims that were manually billed and will not import into vTrack*

1. Locate Claims to Remove/Apply Payments

- Navigate to the Payments drop-down menu
- Click-> Payment Entry



2. First Filter Set Search

- ❖ There are 2 search options available in the first filter set
 - 1st Option Month/Year-> This option will only return claims within the selected month/year
 - 2nd Option Date range-> This option will return claims for a specific date range

The screenshot shows the vTrack application interface with the title "vTrack DDD Claim Tracking and Compliance". A navigation menu includes Home, Claims, Clients, Provider, Coordinators, Payments, Reports, Financials, and Security. Two search options are highlighted with red dashed boxes and red arrows:

- Option #1:** "Select the month/year for payment entry". It features a radio button, a "Month:" dropdown menu set to "May", and a "Year:" dropdown menu set to "2019".
- Option #2:** "Or, select a date range for the export". It features a radio button, "Start Date:" and "End Date:" input fields with calendar icons, a "Select the Auth Type" dropdown menu set to "DDD", and a "Display" button.

- Click-> Box next to desired search option
- For Month/Year Select-> Month/Year from the drop-down menus
- For Date Range Enter-> Start and End Dates
- Select-> DDD from the Select the Auth Type drop-down menu
- Click-> Display

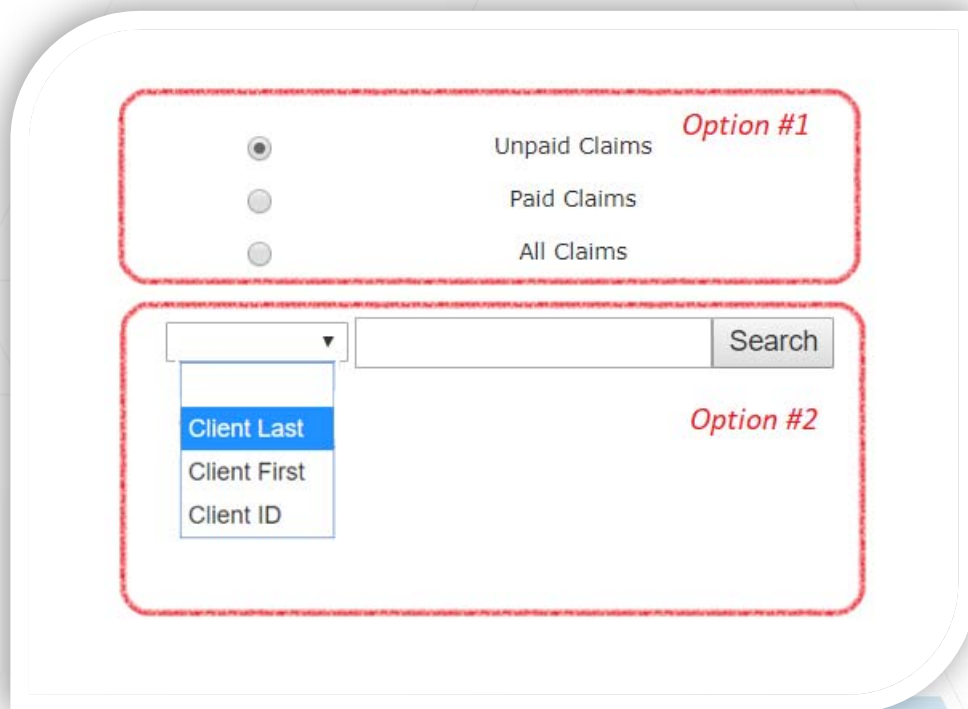
The screenshot shows the vTrack application interface with the title "vTrack DDD Claim Tracking and Compliance". A navigation menu includes Home, Claims, Clients, Provider, Coordinators, Payments, Reports, Financials, and Security. Two search options are highlighted with red dashed boxes and red arrows:

- Option #1:** "Select the month/year for payment entry". It features a radio button, a "Month:" dropdown menu set to "Jun", and a "Year:" dropdown menu set to "2019".
- Option #2:** "Or, select a date range for the export". It features a radio button, "Start Date:" and "End Date:" input fields both set to "05/07/2019", a "Select the Auth Type" dropdown menu set to "DDD", and a "Display" button.

****Please note: After clicking display, two additional sets of filters will appear. These filters are used to narrow your search****

3. Second Filter Set

- ❖ There are two search options available to use in the second filter set
 - 1st Option-> Search by Payment Status
 - 2nd Option-> Search by specific Client Information



The screenshot displays two filter options, each enclosed in a red dashed border.
Option #1: A radio button selection interface with three options: "Unpaid Claims" (selected), "Paid Claims", and "All Claims".
Option #2: A search interface featuring a dropdown menu with "Client Last" selected, a text input field, and a "Search" button.

➤ **1st Option Payment Status Filter**

- Unpaid Claims selection will return only claims with balances due
- Paid Claim selection will return only claims paid in full or overpaid
- All Claims will return all claims regardless of the payment status
- Check-> Box next to desired selection



➤ **2nd Option Client Info Filter**

- Select-> Client Last, First, or ID from the search drop-down menu
- Enter-> Corresponding search criteria from your selection
- Click-> Search



- Your search results will appear under the filters

Claim ID	Start	Client	Client ID	Provider	Unpaid Units	Units	Service Code	Rate	Add'l?	Transaction/Check Number	Payment	Balance	Total Bill	Delete Payment
381100	05/07/2019	Sanchez,Ricky	0005201884	ABEYTA's,RELLES's	1	2	HNI	37.45	<input type="checkbox"/>	2E0089856412/85391567 - 05/15/2019 - 2345.67		37.45	74.90	Delete Payment

****Example****

Update

4. Remove the original payment

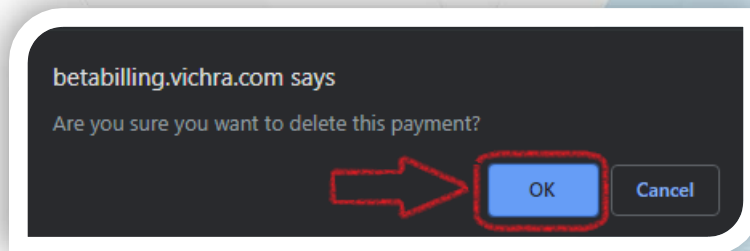
Use this process if you are removing a payment due to recoupment or reverse/rebill. If you are applying a payment continue to step 5

- Make a note of the original payment number prior to removing
- Click-> Delete Payment

Claim ID	Start	Client	Client ID	Provider	Unpaid Units	Units	Service Code	Rate	Add'l?	Transaction/Check Number	Payment	Balance	Total Bill	Delete Payment
381100	05/07/2019	Sanchez,Ricky	0005201884	ABEYTA's,RELLES's	1	2	HNI	37.45	<input type="checkbox"/>	2E0089856412/85391567 - 05/15/2019 - 2345.67		37.45	74.90	Delete Payment

Update


- A pop-up to confirm deletion will appear
- Click-> OK



- The payment has now been deleted

Claim ID	Start	Client	Client ID	Provider	Unpaid Units	Units	Service Code	Rate	Add'l?	Transaction/Check Number	Payment	Balance	Total Bill
381100	05/07/2019	Sanchez,Ricky	0005201884	ABEYTIYA,RELLES'S	2	2	HN1	37.45				74.90	74.90

Update



5. Add Payment

- Select-> Transaction/Check Number from the drop-down menu
- Enter-> New payment amount
- Click-> Update




Client Last ▾ Sanchez

Claim ID	Start	Client	Client ID	Provider	Unpaid Units	Units	Service Code	Rate	Add'l?	Transaction/Check Number	Payment	Balance	Total Bill
381100	05/07/2019	Sanchez,Ricky	0005201884	ABEYTIYA,RELLES'S	2	2	HN1	37.45			74.90	74.90	74.90

Update

- 2E0089656412/05391567 - 05/15/2019 - 2345.67
- DDD2E0123/DDD2E0123 - 04/02/2019 - 5.00
- BCBS0123/BCBS0123 - 04/02/2019 - 5.00
- SchoolKY20123/SchoolKY20123 - 04/02/2019 - 5.00
- Aetna0123/Aetna0123 - 04/02/2019 - 5.00
- Aetna/123456789/123456789 - 03/15/2019 - 1000.00
- 1111-DDD-1111/1111-DDD-1111 - 12/17/2018 - 29.90
- 11313-Aetna/11313-Aetna - 12/17/2018 - 45.00
- RS123456789/123456789 - 11/26/2018 - 70.00
- 12340DD/12340DD - 11/26/2018 - 800.00
- 9999/1234 - 06/01/2018 - 100.00
- 123/123123123123 - 03/01/2017 - 123.00
- TESTING001/TESTING001 - 12/06/2016 - 1212.12
- 2E000929857/1234 - 04/13/2016 - 500.00
- 201406DDD/201406DDD - 06/30/2014 - 300.00
- 201406BCBS/201406BCBS - 06/30/2014 - 200.00
- 201406Aetna/201406Aetna - 06/30/2014 - 100.00
- 2014MAR21/2014MAR21 - 03/21/2014 - 321.14
- BCBSAZ84857849/456 - 09/21/2009 - 86.00

74.90


- Success! The claim balance is now \$0.00

Claim ID	Start	Client	Client ID	Provider	Unpaid Units	Units	Service Code	Rate	Add'l?	Transaction/Check Number	Payment	Balance	Total Bill	Delete Payment
381100	05/07/2019	Sanchez,Ricky	0005201884	ABEYTIJA%,RELLES'S	0	2	HN1	37.45	<input type="checkbox"/>	2E0089856412/85391567 - 05/15/2019 - 2345.67		0.00	74.90	

Update

6. Add a Note to the Original Payment

Use this for transactions in which a payment has been removed, as it causes an imbalance to the Total Balance Paid field of that transaction

- Navigate to the Payments drop-down menu
- Select-> Transaction List

vTrack

DDD Claim Tracking and Compliance

Home Claims ▾ Clients ▾ Provider ▾ Coordinators ▾ **Payments ▾** Financials

Welcome to the vTrack Claim Tracking System

Add Transaction

Import Results

Payment Entry

Payment Import

Transaction List



- Select-> Payment search criteria from the drop-down menu
- Enter-> Corresponding criteria from your drop-down menu selection using note from step 4
- Click-> Search

vTrack
DDD Claim Tracking and Compliance

Home Claims ▾ Clients ▾ Provider ▾ Coordinators ▾ Payments ▾ Reports ▾ Financials ▾ Security ▾

Transaction List

Transaction Number ▾ Enter Search criteria here Search

View/Edit	Transaction Number	Check Number	Check Date (yyyy-mm-dd)	Deposit Date	Payment Amount	Total Balance Paid:	Export	Notes
Edit	1234000	853915	05/15/2019		2345.67	74.90	Export Paid Claims	
Edit	BCBS0123	BCBS01	00/00/0000		5.00	5.00	Export Paid Claims	

- Click-> Edit on the Transaction

vTrack
DDD Claim Tracking and Compliance

Home Claims ▾ Clients ▾ Provider ▾ Coordinators ▾ Payments ▾ Reports ▾ Financials ▾ Security ▾

Transaction List

Transaction Number ▾ 2E0089856412 Search

View/Edit	Transaction Number	Check Number	Check Date	Deposit Date	Payment Amount	Total Balance Paid:	Export	Notes
Edit	2E0089856412	85391567	05/15/2019	05/15/2019	2345.67	74.90	Export Paid Claims	

Max results per page: 25 Set

Delete Selected



- Enter-> Transaction Notes
- Click-> Update Check

Transaction Entry

Transaction Number:

Transaction Type:

Transaction Notes:
Example

Check Number: <input type="text" value="85391567"/> Bill ID: <input type="text" value="11811645"/> Check Date: <input type="text" value="05/15/2019"/> Deposit Date: <input type="text" value="05/15/2019"/> Check Amount: <input type="text" value="2345.67"/>	Check Number: <input type="text"/> Bill ID: <input type="text"/> Check Date: <input type="text"/> Deposit Date: <input type="text"/> Check Amount: <input type="text" value="0.00"/>
---	--

Check Number: <input type="text"/> Bill ID: <input type="text"/> Check Date: <input type="text"/> Deposit Date: <input type="text"/> Check Amount: <input type="text" value="0.00"/>	Check Number: <input type="text"/> Bill ID: <input type="text"/> Check Date: <input type="text"/> Deposit Date: <input type="text"/> Check Amount: <input type="text" value="0.00"/>
--	--

- The Notes icon can now be seen from the transaction list
- To view the note, Click-> The Notes icon

vTrack
DDD Claim Tracking and Compliance

Home Claims ▾ Clients ▾ Provider ▾ Coordinators ▾ Payments ▾ Reports ▾ Financials ▾ Security ▾

Transaction List

Transaction Number: Search

View/Edit	Transaction Number	Check Number	Check Date	Deposit Date	Payment Amount	Total Balance Paid:	Export	Notes
<input type="checkbox"/> Edit	2E0089856412	85391567	02/20/2019	02/22/2019	2345.67		Export Paid Claims	

Max results per page: Set

****For additional support, please contact us at vTrack@Vichra.com****

