



## Division of Public and Behavioral Health Policy

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### 1.0 Policy

It is the Policy of the Division of Public and Behavioral Health (DPBH), Substance Abuse, Prevention, and Treatment Agency (SAPTA) that all providers, in accordance with 505 (a) of the Public Health Service Act (42 US code 290aa-4) which directs the Administrator of the Substance Abuse and Mental Health Services Administration (SAMHSA), to collect items including admission and discharge data.

### 2.0 Procedure

1. When payments are received from insurance companies, Medicaid (HPN and/or Amerigroup) and/or SAPTA, they will need to be posted against the client's outstanding balance in Avatar.

NOTE: For SAPTA payments, you must have the Request for Reimbursement (RFR) readily available in order to reference what was billed to SAPTA and what was paid.

2. From the HOME screen, in the **Search Forms** field, search for the **Spreadsheet Remittance Posting** form.
  - a. Double-click to open the form.

The screenshot shows a search interface with a search bar containing 'spreadsheet re'. Below the search bar is a table with two columns: 'Name' and 'Menu Path'. The table contains one row with the following data:

Name	Menu Path
Spreadsheet Remittance Posting	Avatar PM / Billing / Remittance Processing

3. Search for the **Client** by either last name, ID or claim number.
  - a. To search by claim number, enter a "+" in front of the claim number and Avatar will find the client that is associated with that claim number. (EX: +123)
4. In the **Post by Claim or Episode**, always choose **Claim**.

The screenshot shows a search interface with a search bar containing 'ROBBINS,STEPHANIE (2)'. Below the search bar are three radio buttons for 'Post By Claim or Episode': 'All Episodes', 'Claim', and 'Episode'. The 'Claim' radio button is selected and highlighted with a red box.



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5. Choose the **Claim** from the drop-down list of various claims for this client.

Claim

6. The **Episode** field and **Program of Service** field will remain greyed out.

Episode

Program Of Service

7. The **Start Date** and **Stop Date** will automatically populate.

Start Date  T Y

Stop Date  T Y

8. If there are more than one **Guarantor** to choose from, choose the correct choice from the **Guarantor to Post For** field based on where the payment came from.

Guarantor to Post For

9. The **Posting Date** and **Date of Receipt** will always be the last day of the month for the RFR.
- For example: if you are posting payments for a July SAPTA RFR for a date of service that occurred in July, you will enter 07/31/2015 in both date fields.
  - However, a July service may have been in the August RFR.
  - THIS IS A VERY IMPORTANT STEP IN THIS PROCESS.

Posting Date  T Y

Date of Receipt  T Y



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10. To select a default payment code for the payments that will be posted, type it in to the **Default Payment/Adjustment Code for Amount to Post** field.

- 100 – Cash
- 101 – Check
- 102 – Money Order
- 103 – Debit/EFT – use this choice for SAPTA payments
- 104 – ACH – electronic funds – used with electronic billing
- 105 – Credit Card

Default Payment/Adjustment Code For Amount To Post

Results

100 Payment - Cash
101 Payment - Check
102 Payment - Money Order
103 Payment Debit/EFT
104 Payment - ACH
105 Payment - Credit Card

11. Click on **Launch Work Screen** in the middle right of the page in order to see the pending payments and post the dollar amounts.

Launch Work Screen

12. The Work Screen will display with Client Name and Guarantor in the upper left hand corner. Always double-check to ensure you are working with the correct client.

	Service Ep #	Service Date	Service Code	Current Balance	Payment Amount	Payment Code	Adjust Amount	Adjust Code	Transfer Amount	Transfer Code	Transfer Guar	New Balance
1		2/06/03/2015	H0005	44.77	0.00		0.00		0.00			44.77
2		2/06/10/2015	H0005	44.77	0.00		0.00		0.00			44.77
3		2/06/17/2015	H0005	44.77	0.00		0.00		0.00			44.77
4		2/06/24/2015	H0005	44.77	0.00		0.00		0.00			44.77
5		2/07/08/2015	H0005	44.77	0.00		0.00		0.00			44.77
6		2/07/15/2015	H0005	44.77	0.00		0.00		0.00			44.77
7		2/07/22/2015	H0005	67.16	0.00		0.00		0.00			67.16

13. For SAPTA payments, compare the RFR to what was billed and what was paid for what dates of service.

14. To post the payment, type in the payment amount in the correct column, on the correct service date row.

	Ep #	Service Date	Service Code	Current Balance	Payment Amount
1		2/06/03/2015	H0005	44.77	0.00

15. If a default posting code was selected in Step 10 listed above, the **Payment Code** will auto-populate.



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- a. If a default code was not selected, enter in the **Payment Code** into the proper field, attached to the proper service date.

	Ep #	Service Date	Service Code	Current Balance	Payment Amount	Payment Code
1		2/06/03/2015	H0005	44.77	44.77	103

16. Once all payments for this client have been posted, click **Accept** at the bottom of the page. This will post the payment received on this client's account.
17. For SAPTA RFR payments, repeat for all payments listed on the RFR.
18. This process of posting payments should be done on a monthly basis, as payments are received in order for Avatar to correctly display outstanding liabilities.