

# Post Payments from EOB

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## About

There are two ways you can post EOBs (Explanation of Benefits) within NextStep Billing. The first way is to post directly to an individual Line Item and the second way allows you to post bulk payments in one place allowing you to move easily from client to client.

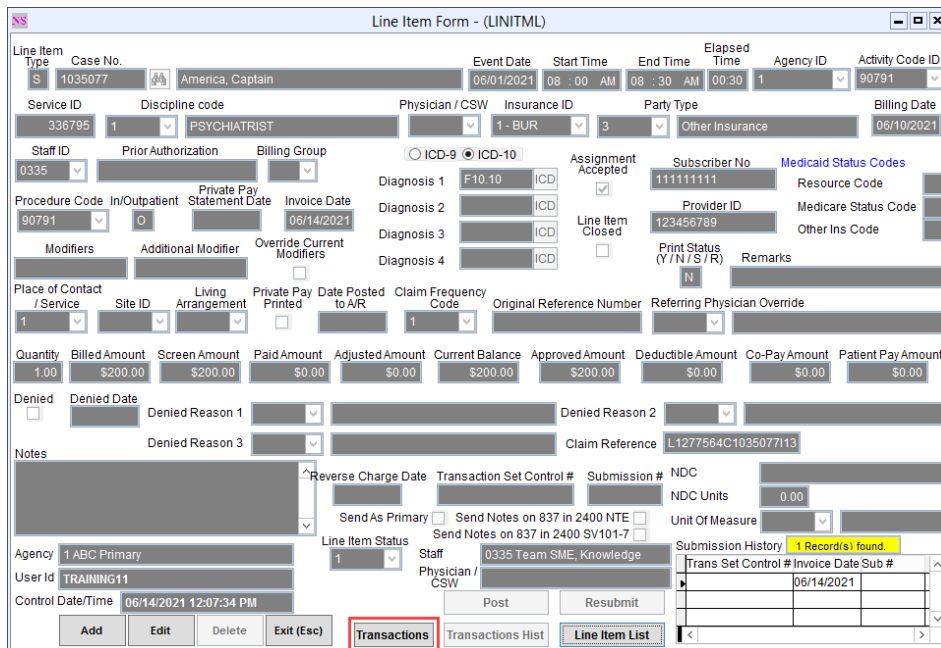


**Note:** A Line Item needs to have a Print Status of **N** and Line Item Closed must **not** be selected (meaning the Line Item is open) in order to be able to post a payment to it.

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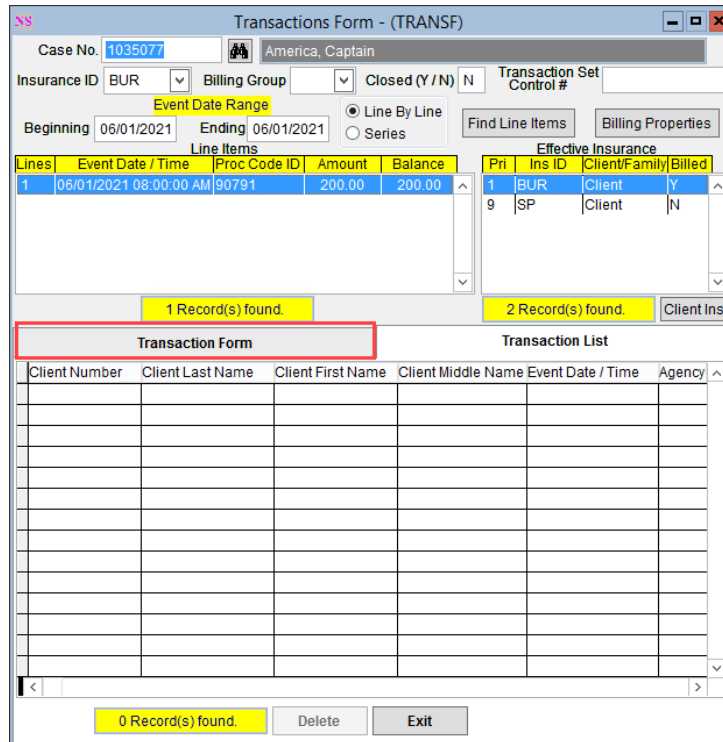
## Post EOB: Directly to Line Item

1. Navigate to the Line Items Filter Form: **File > Billing > Line Items**.
2. Use the filters to narrow down your search (e.g. by Client or Payer).
3. Click the **Ok** button. The Line Items List displays Line Items based on your search criteria.
4. Select the Line Item you want to open and click the **Ok** button. The Line Item Form is displayed.
5. Click the **Transactions** button.

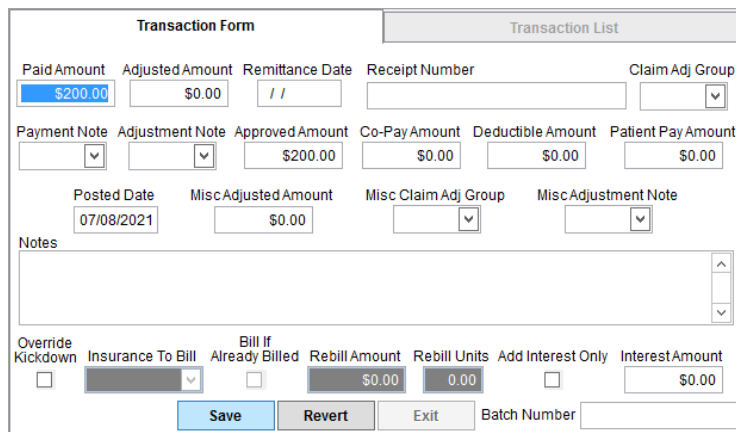


The screenshot shows the 'Line Item Form - (LINITML)' window. It contains numerous fields for patient and insurance information, including Case No., Event Date, Start Time, End Time, Agency ID, Activity Code ID, Service ID, Discipline code, Physician / CSW, Insurance ID, Party Type, Billing Date, Staff ID, Prior Authorization, Billing Group, ICD-9/10 codes, Diagnosis 1-4, Assignment Accepted, Subscriber No, Medicaid Status Codes, Resource Code, Procedure Code, In/Outpatient, Private Pay Statement Date, Invoice Date, Provider ID, Medicare Status Code, Other Ins Code, Modifiers, Additional Modifier, Override Current Modifiers, Print Status (Y/N/S/R), Remarks, Place of Contact / Service, Site ID, Living Arrangement, Private Pay Date Posted to A/R, Claim Frequency Code, Original Reference Number, Referring Physician Override, Quantity, Billed Amount, Screen Amount, Paid Amount, Adjusted Amount, Current Balance, Approved Amount, Deductible Amount, Co-Pay Amount, Patient Pay Amount, Denied Date, Denied Reason 1-3, Claim Reference, Reverse Charge Date, Transaction Set Control #, Submission #, NDC, NDC Units, Unit Of Measure, Send As Primary, Send Notes on 837 in 2400 NTE, Send Notes on 837 in 2400 SV101-7, Agency, User Id, Control Date/Time, Line Item Status, Staff, Physician / CSW, Submission History, Trans Set Control #, Invoice Date, Sub #. At the bottom, there are buttons for Add, Edit, Delete, Exit (Esc), Transactions (highlighted with a red box), Transactions Hist, and Line Item List.


6. In the Transactions Form, click on the **Transactions Form** tab.




7. Click the **Add** button.
8. Enter the EOB details.



9. Click the **Save** button to post the payments and adjustments.

 **Note:** Select the **Override Kickdown** checkbox if you need to apply a specific override to the Line Item and enter the override information to the right of the checkbox.

## Post EOB: Bulk Payments

1. Navigate to the Transactions Entry Grid Form: **File > Billing > Transactions Entry Grid**
2. Search for the client by entering the **Case No.**, or clicking the **Search** button .
3. (Optional) Enter an **Event Date Range** or **Transaction Set Control #**.
4. Click the **Find Line Items** button. The open Line Items for the client populate in the grid below.

