

Insurance - Bulk Payment Processing

892 [TDOKB1](#) February 26, 2026 [Insurance Tools](#), [TDO software](#) 6.98K

Overview

TDO allows processing an insurance payment that covers several patients.

Detailed Instructions

Receiving Bulk Insurance Payments

When an insurance carrier sends a bulk payment for multiple patients, this is recorded under **Insurance Tools > Receive an Insurance payment**.

You will enter the payment details: Amount, Carrier, Type of Payment, Payment Reference, and Doctor for Deposit.

The Digital Office, Location: ONE, Program Version: Release 12.4 - TDO

FILE Main Messaging Imaging Setup Help Kevin Clay

Calendar Register Patient Clinical Front Desk Administrative Doctors Reporting Insurance Tools Notes eRx Organizer Acquire Draw Screen Capture - All Area Task Reminder Close Log Off

Main Data

Last Name: James First Name: Kevin Phone: 9513477612

Click to Paste Pre-op 1 Image Click to Paste Post-op 1 Image

Hide R Alerts View Note Menu

Patient Appointment Receive Insurance Payment

Case Presentation

Receive Insurance Payment

1. Input payment info:

All fields are required.

Date: 8/19/2022

Amount Received: 1500 Total: 1500

Insurance Company: ABC Insurance

Type of Payment: Credit Card

Reference: Visa

Doctor for Deposit: CARR

Location for Deposit: ONE

2. Enter amount per claim to apply:

Claim#	Date Sent	Claim Amount	Patient Name	Doctor	Location	Enter Amount to Apply	Date Received	Close Claim
180645		\$1,000.00	James, Kevin	CARR	ONE	\$0.00	8/19/2022	☒
180646		\$1,000.00	James, Kevin	CARR	ONE	\$200.00	8/19/2022	☐
180651		\$92.00	James, Kevin	CARR	ONE	\$10.00	8/19/2022	☐
180551	11/19/2021	\$280.00	Zoom, Anita	CARR	ONE	\$250.00	8/19/2022	☐
180576	11/19/2021	\$250.00	Zoom, Anita	CARR	ONE	\$250.00	8/19/2022	☐
180686	8/4/2022	\$170.00	Zwetsch II, Ingrid	CARR	ONE	\$90.00	8/19/2022	☐

Total Amount to Apply: 800

Total Amount Left: 700

Ok Cancel

User: kevin BP: 110/80

SOFT ACCESS

Then you will apply the appropriate amount of the total payment to each patient and you can close the claim on each line you have applied payments to.

Once you hit save and close, it will apply all of the individual payments on the selected charts and allow

you to make any adjustments to those accounts at that time.

Bulk payment via credit card:

In version 12.450f and above of TDO, you can receive a bulk insurance payment using TDO Payments services. To do this, you will follow the steps above, and for the type you will select, credit card and reference will be the type of (virtual) card. It will then run once and apply to all patients.

How to change a patient's insurance when it is no longer active

Marking the insurance inactive. Flipping primary insurance and secondary insurance. If the claim was sent to the wrong company, it must be voided before recreating under the proper carrier.

Online URL: <https://kb.tdo4endo.com/article.php?id=892>