Insurance - Bulk Payment Processing

892 TDOKB1 February 26, 2026 Insurance Tools, TDO software 7.54K

Overview

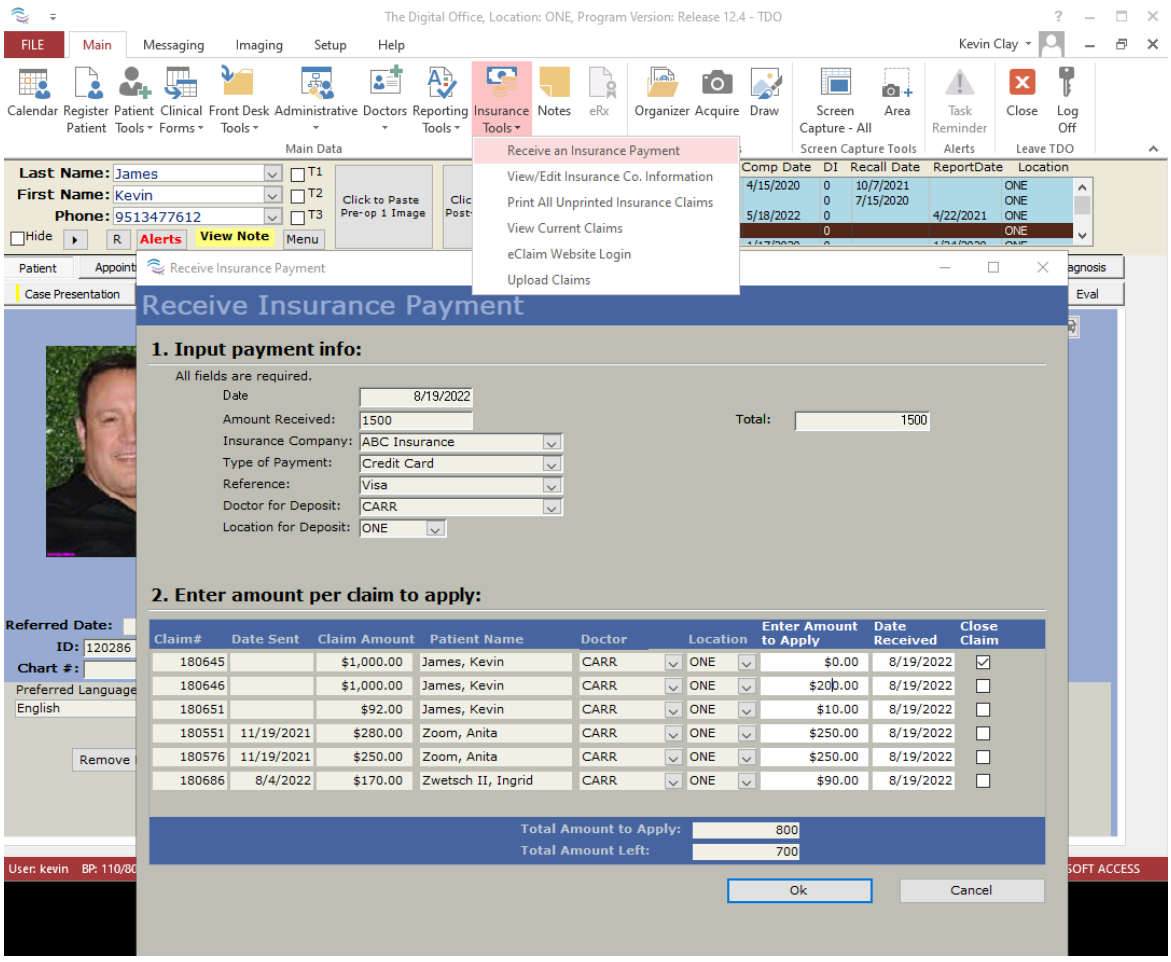
TDO allows processing an insurance payment that covers several patients.

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.



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How to change a patient's insurance when it is no longer active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

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