Ledger page - Provider Production Transfers or Splits

941 TDOKB1 September 5, 2025 Pages 2.52K

Overview

If production is recorded on the wrong provider, location, or if providers are splitting that production, you need to reduce the production on the incorrect provider. Then, increase production on the provider that should have been billed out for the service. Sometimes this can be splitting of treatment between two providers, where one starts the treatment and the second completes it.

Table of Contents

Posted under Incorrect Provider

Insurance already resolved

When production is posted under the incorrect provider and insurance has already been resolved before it is discovered:

- **On the doctor who was billed in error.**
- In the **Ledger –** select **Credit Adjustment** and enter the amount of the improperly billed fee.
  - **Reason** is “Procedure Change”.
  - **Reference** is “Provider procedure change”.
- **On the doctor who should be billed for treatment.**
- Under **Fees –** enter the fee again under the proper provider.
- Create and close a non-assigned claim for this fee if applicable.

Insurance not sent, or Insurance sent but payment not received yet

When production is posted under the incorrect provider and insurance has not been sent, or insurance was sent but payment has not yet been received:

- **On the doctor who was billed in error.**
    - **If applicable:** Void insurance claim.
- **Void fees** on the **Ledger page** posted to wrong provider.
- **On the doctor who should have been billed.**
- From **Fees**: post the back-dated fees to the proper provider (enter DOS in both **Presented** and **Posted On** boxes).
    - Create an insurance claim **(if applicable),** and if it has not been sent, send it as normal.
    - If it has been sent and not paid, save it as a paper claim form so that when payment is received, it will not be applied to the proper provider.

Splitting Production between two (2) Providers

When production is being split between two providers:

- **On the doctor with the full fee posted.**
    - From the **Ledger page –** select **Credit Adjustment** and enter half of the fee amount.
- **On the doctor that is being posted the other half of the fee.**
    - From the **Fees page –** post a back dated fee for half of the amount.
    - Create and close a non-assigned claim.

Important: It is important to record these as a credit adjustment and a fee (not a debit adjustment), so that the adjusted production number is accurate when running reports, and it does not change your receipts.

Back-dating Fees: Please note these transactions should be posted for the actual date of service.

Allocating payments after provider fee(s) moved

It is important to ensure payments have been properly allocated after movement of fees.

Please see KBs:

- Ledger page - Provider Payment Transfers
- TDOxQB sync - Ledger page - Provider Payment Transfers with QB

Where to find Cross Posting errors

To identify patients where cross-posting errors have occurred, please go to **Administrative** > **Ledger Adjustment Tool** or under **Cloud Reporting Tools** > **Patients** > **Ledger Adjustment Tool List** to get the list of patients, and you will need to make the corrections in each chart.

Online URL: https://kb.tdo4endo.com/article.php?id=941