Collecting Patient Payments

TABLE OF CONTENTS

Cashiering: Payment Collection

It is the policy of Sharp Rees Stealy to accept payments on-site by cash, check or credit card. Payments are received by a Business Service Rep (BSR) or Patient Service Rep (PSR). All designated cashier areas will maintain a cash drawer and a bank. A receipt is issued for all payments received. Reconciliation of monies in the cash drawer is done daily.

BANK

- A cash amount set by management to be used as the starting and ending amount for a cash drawer. This cash is maintained in denominations small enough to offer return change. The bank is never short or over. These discrepancies are reported in your deposit.

CASH DRAWER

- The location designated in a cashiering area that holds all monies and receipts.
- The cash drawer should be locked at all times.

ISSUING OF CASH BANK/STARTING THE DAY

- Each employee is assigned his or her own bank and cash drawer.
- The cash drawer must always be locked when not in use.
- Each individual is responsible for signing the site bank log when picking up his or her bank.
- Each employee is responsible for verifying the starting cash amount in their bank and any discrepancies must be reported immediately to the Lead and/or Supervisor.

FORMS OF PAYMENT/ACCEPTING PAYMENTS

- Always accept payments/never decline.
- Overpayments can always be refunded.
- Multiple same day co-payments may be collected at one desk.

Acceptable payments

- Cash
  - Always count back change
  - US Currency only
- Insurance checks made out to Sharp, the facility or the patient/guarantor
- Personal checks
  - Must have a preprinted name, address and check number.
  - Check cashing for patients or employees is not allowed.
  - Review current date, numeric amount and description must be equal, signed by party named on the check, name of clinic.
  - Write patient's EMRN on the front of the check.
  - Endorse check by stamping the back with SRS stamp.
- Credit Card: Visa, MasterCard, American Express, Discover
  - No minimum amount required.
  - Card must be signed or a picture ID must be presented.
  - Credit card payments are accepted over the phone.

- ATM Cards must have a VISA or MasterCard Logo
  - Travelers checks
    - Change can be given for travelers checks
    - Batch with personal checks
    - Check picture ID and name for likeness
    - Endorse check by stamping the back with SRS stamp
  - Money order or Cashier's Check made out to the facility
    - Money orders must be for the exact amount
    - Batch with personal checks

Unacceptable Payments

- Foreign currency
- Non-insurance two –party checks
- Credit cards other than those listed above.
- We do not accept postdated checks.

REFUNDS FOR SAME DAY CO-PAYMENTS

- Patients may receive an immediate refund for payments towards current day services that are not received.

  1. Direct patient to the individual who originally collected the payment
  2. Obtain original receipt from the patient. DO NOT refund money without a receipt
  3. Staple the patient's receipt to the clinic copy and write VOID on all copies
  4. Issue refund to the patient in the same payment method received. Have the patient sign the receipt that they received their money.
  5. Delete payment from your cash drawer.
  6. Document reversals on the Batch Reconciliation Sheet.

CASHING OUT/BALANCING THE CASH DRAWER

- Count out your starting bank amount and put monies back in the Bank Cash Bag.
- Count all collected payments and batch as follows:
  - Ones all together facing the same direction
  - Fives all together facing the same direction
  - Tens all together facing the same direction
  - Twenties all together facing the same direction
  - Coins in an envelope with dollar amount specified on front of envelope
  - Checks stamped on back and all facing the same direction.
- When counting all collected payments, use an adding machine. Run two tapes for each type of payment: cash, checks, credit cards. Attach to the payments with paperclip.
- Complete the reconciliation form

BATCH PROOF

- A batch proof is a print out that documents all transactions in a single batch.
- Print a copy of the Batch Proof.
- Circle any reversals on the Batch Proof

Site Bank Log

The site bank log should be used to track the use of the cash banks.

CASH BAG/RECEIPT VERIFICATION

DEPARTMENT RBUC

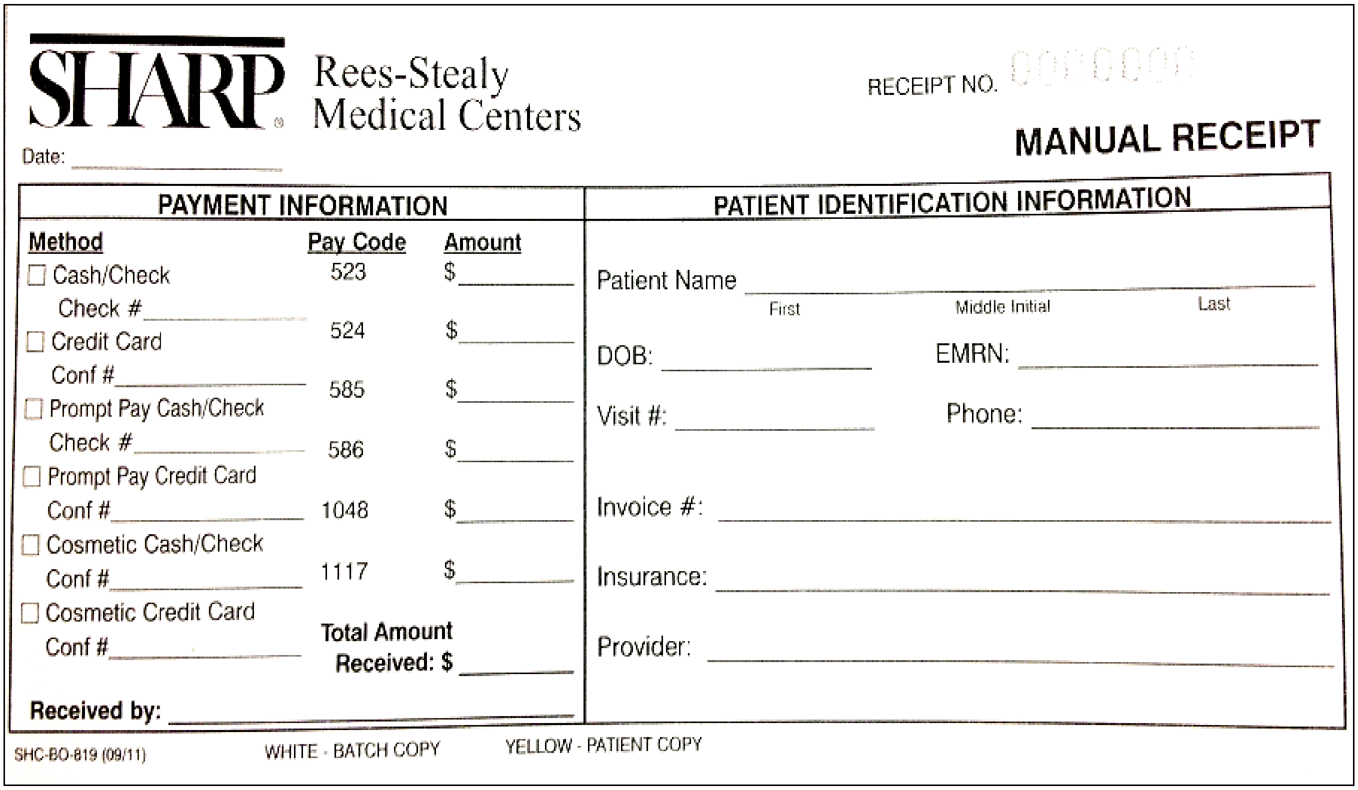
CASHIER VERIFY REQUIRES 2 INITIALS	DATE	NAME (PRINT)	START OF SHIFT BEGINNING RECEIPT #// ENDING RECEIPT #	BANK $	END OF SHIFT BEGINNING RECEIPT #// ENDING RECEIPT #	ENDING BANK $	ONLINE BATCH #	RECEIPTS SEQUENCE #'s USED	SIGNATURE

8/2/00

Manual Receipts

Manual Receipts are used when Advanced Web is unavailable.

- Manual Receipts are posted in Advanced Web when the system becomes available.
- Once completed, give the yellow copy to the patient and the white copy goes in your deposit.
- When not in use, keep all manual receipts locked in an appropriate location.
- Submit manual receipts with printed receipts in your deposit.



SHARP Rees-Stealy Medical Centers

RECEIPT NO.

MANUAL RECEIPT

Date: ____________

PAYMENT INFORMATION		
Method	**Pay Code**	**Amount**
☐ Cash/Check Check # ________	523	$ ________
☐ Credit Card Conf # ________	524	$ ________
☐ Prompt Pay Cash/Check Check # ________	585	$ ________
☐ Prompt Pay Credit Card Conf # ________	586	$ ________
☐ Cosmetic Cash/Check Conf # ________	1048	$ ________
☐ Cosmetic Credit Card Conf # ________	1117	$ ________
	Total Amount Received: $	________

Received by: ________________

PATIENT IDENTIFICATION INFORMATION

Patient Name ________________ (First / Middle Initial / Last)

DOB: ________ EMRN: ________

Visit #: ________ Phone: ________

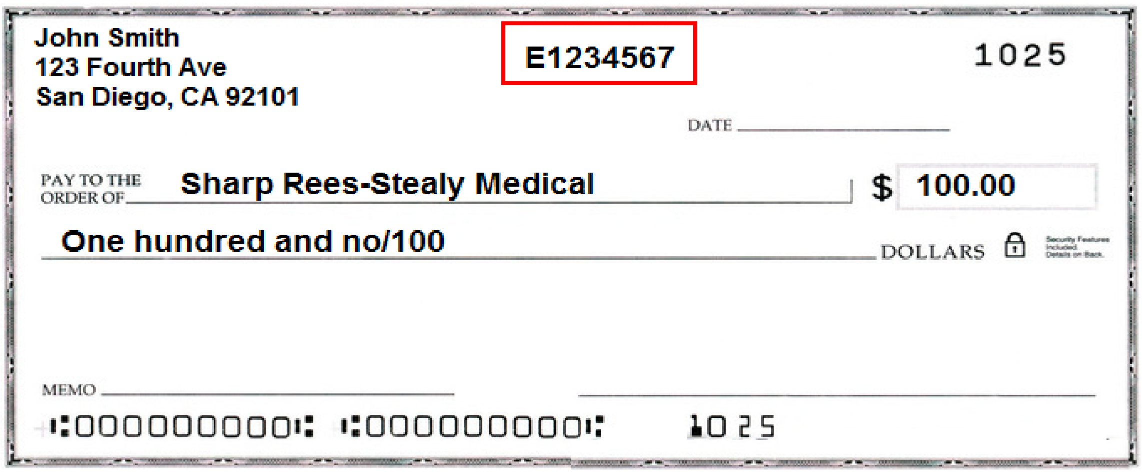
Invoice #: ________________

Insurance: ________________

Provider: ________________

SHC-BO-819 (09/11) WHITE - BATCH COPY YELLOW - PATIENT COPY

- Must have a preprinted name, address and check number.
- Check cashing for patients or employees is not allowed.
- Review current date, numeric amount and description must be equal, signed by party named on the check, name of clinic.
- Write patient’s EMRN on the front of the check.
- Endorse check by stamping the back with SRS stamp.



Receipts that are created through Advanced Web and printed through your printer.

The patient should receive the receipt that says Sharp Healthcare.

```
                         SORRENTO MESA
                         10243 GENETIC CENTER DRIVE
                         SAN DIEGO,CA  92121-6310

      SRSDT,APRIL                              APPT DATE : 11/08/13
      300 FIR STREET
      SAN DIEGO,CA         92101               ACCOUNT #: 04-60-06-31
                                               LIGHT MD,CYRIL SB

                  PAYMENT AMOUNT : $ 15.00 CASH/CHECK PAYMENT
                         COMMENT : COPAY/APPT/CK#1234

 THANK YOU FOR YOUR PAYMENT AND FOR CHOOSING SHARP FOR YOUR HEALTHCARE NEEDS.
 YOU MAY RECEIVE A SURVEY IN THE MAIL. PLEASE LET US KNOW IF WE REACH OUR GOAL
 OF PROVIDING VERY GOOD CARE!

      POSTED BY: AWPSR3   POSTING DATE : 11/08/13        33-0106028

                         SHARP HEALTHCARE
                         SORRENTO MESA
                         10243 GENETIC CENTER DRIVE
                         SAN DIEGO,CA  92121-6310

      SRSDT,APRIL                              APPT DATE : 11/08/13
      300 FIR STREET
      SAN DIEGO,CA         92101               ACCOUNT #: 04-60-06-31
                                               LIGHT MD,CYRIL SB

                  PAYMENT AMOUNT : $ 15.00  CASH/CHECK PAYMENT
                         COMMENT : COPAY/APPT/CK#1234

 THANK YOU FOR YOUR PAYMENT AND FOR CHOOSING SHARP FOR YOUR HEALTHCARE NEEDS.
 YOU MAY RECEIVE A SURVEY IN THE MAIL. PLEASE LET US KNOW IF WE REACH OUR GOAL
 OF PROVIDING VERY GOOD CARE!

      POSTED BY: AWPSR3   POSTING DATE : 11/08/13        33-0106028
```

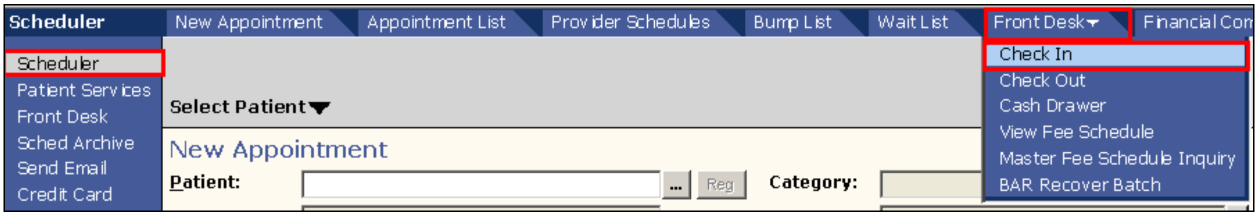
Opening a Batch

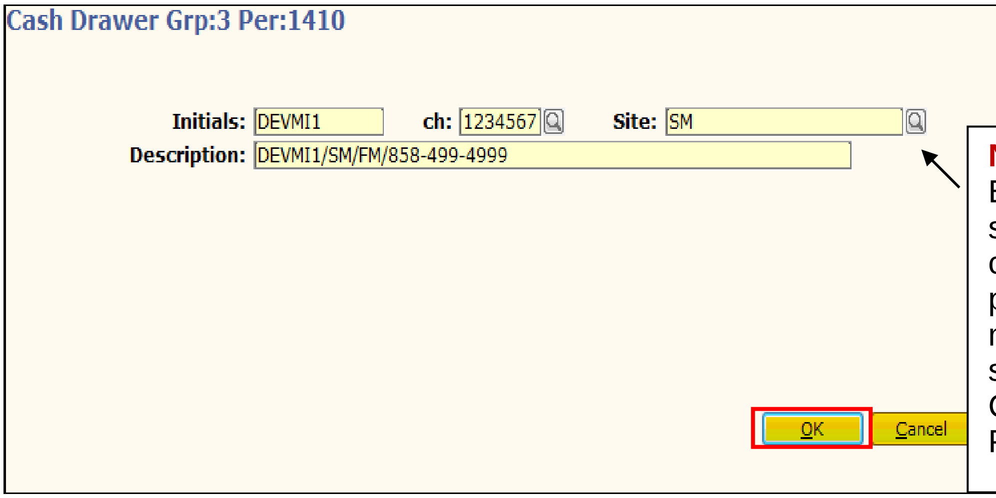
A Batch MUST be open in order to collect payments. All payments collected are posted to your Batch. You can view your batch in order to balance, delete and track payments that have been collected.

Only 1 batch is opened at the beginning of your shift (*not for every patient*) and MUST be balanced and **closed at the end of your shift.**

<u>How to Open a Batch:</u>

1. Click on **Scheduler (VTB)**
2. Click on **Front Desk (HTB)**
3. Select **Check In**



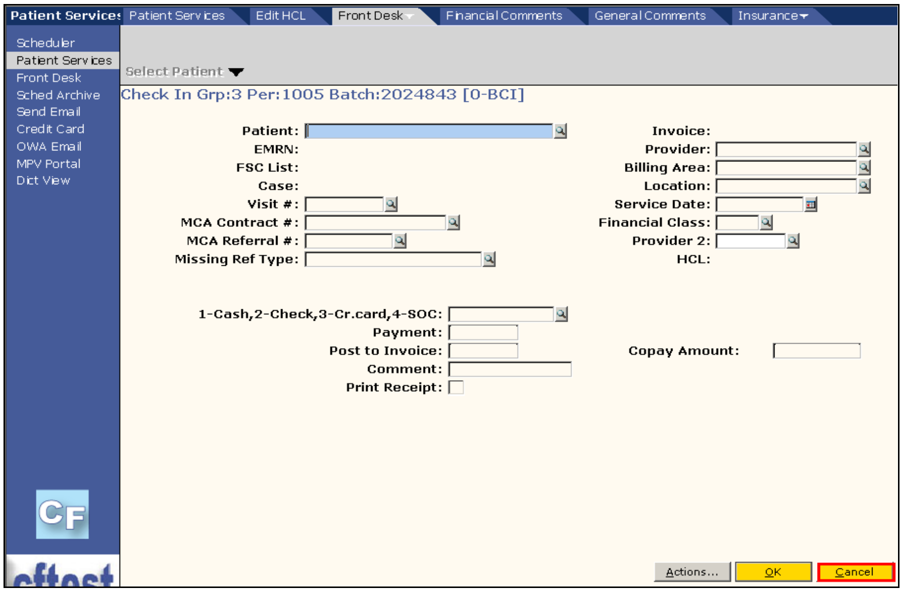


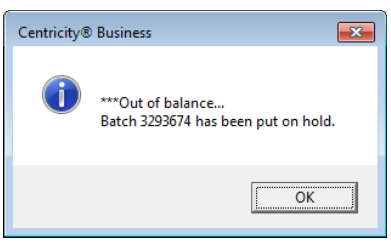
Note: Your Batch Site is the site you are collecting payments at. It must match your site on the Credit Card Processor Site.

4. Type **G** at **"ch"** and press **Tab** (This generates your batch number which documents all your transactions.
   - **Write down your batch number on your daily reconciliation sheet**.
5. Type in the **site location** and Press **Tab**
6. Type in the **Description**: **username / site / department / phone number**
7. Your screen should look similar to the above screen shot before you **Click OK**

Once your Batch is opened, it will bring you to the screen to create a receipt.

8. Click Cancel





Note: you will be ***** Out of balance…** until you balance your batch at the end of your shift.

9. Click **OK**

Verify your credit card site location is correct

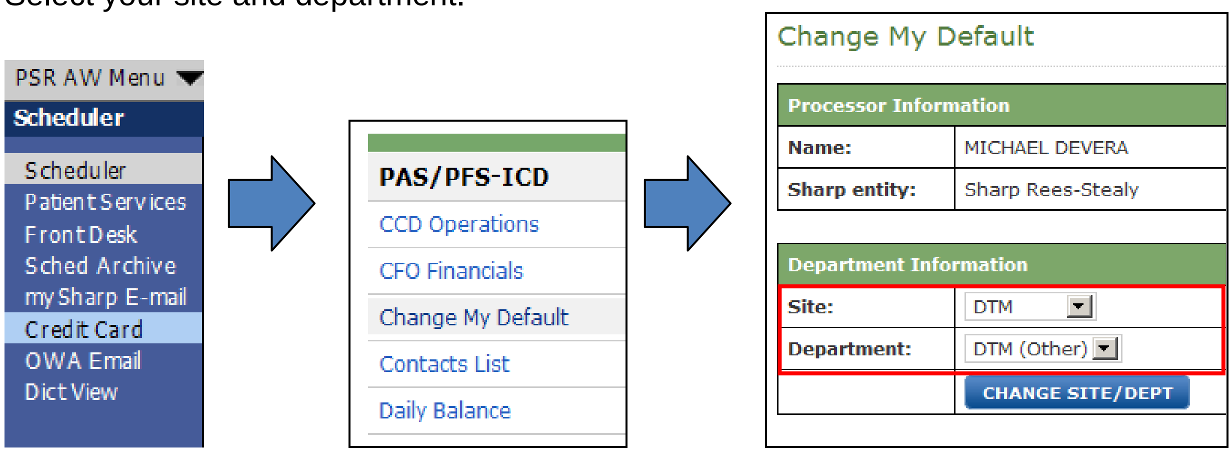
MUST match Batch Site

If incorrect, change your site to the location you are working:

Click Credit Card on the Vertical Tool Bar in Advanced Web.

On the left navigation pane, click Change My Default.

Select your site and department.

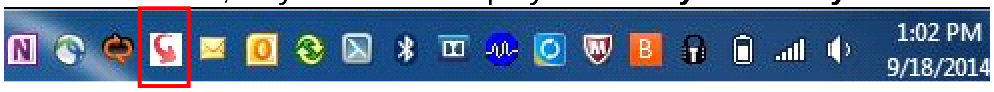


Note: Incorrect site locations will cause site balances to be off.

How to Collect Credit Card Payments:

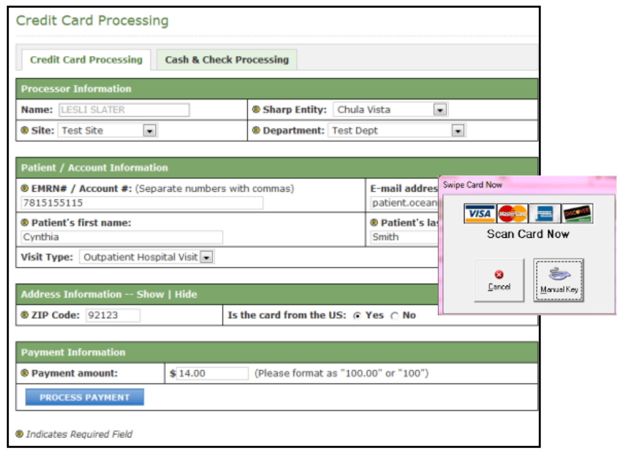
1. Double-click the PaymentMate icon () on your desktop or from the **Start Menu.**

2. Once loaded, PaymentMate displays in the **System Tray**



3. Access the **SharpNET Credit Card Processing** page to begin processing payments.

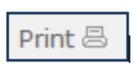
4. **Enter required information**
   - EMRN#
   - Patient's first and last name
   - Payment Amount

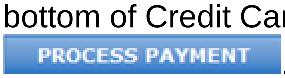


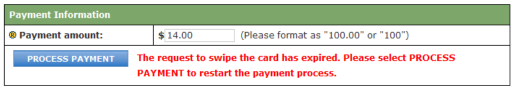
5. Click **Process Payment**. Insert Card.
   - If the "<u>Enter Last 4 Digits of Card</u>" pop up window displays, enter the Last 4 digits on card and press OK.
   - *This occurs if you process a payment using the same credit card information on the same device, two consecutive times.*

6. The **Confirm Amount pop up** window displays. Verify amount and **click Continue.** The Payment Processed Successfully confirmation screen displays.

7. Copy **Confirmation Number** and paste it into the **Receipt Comments** in AW.

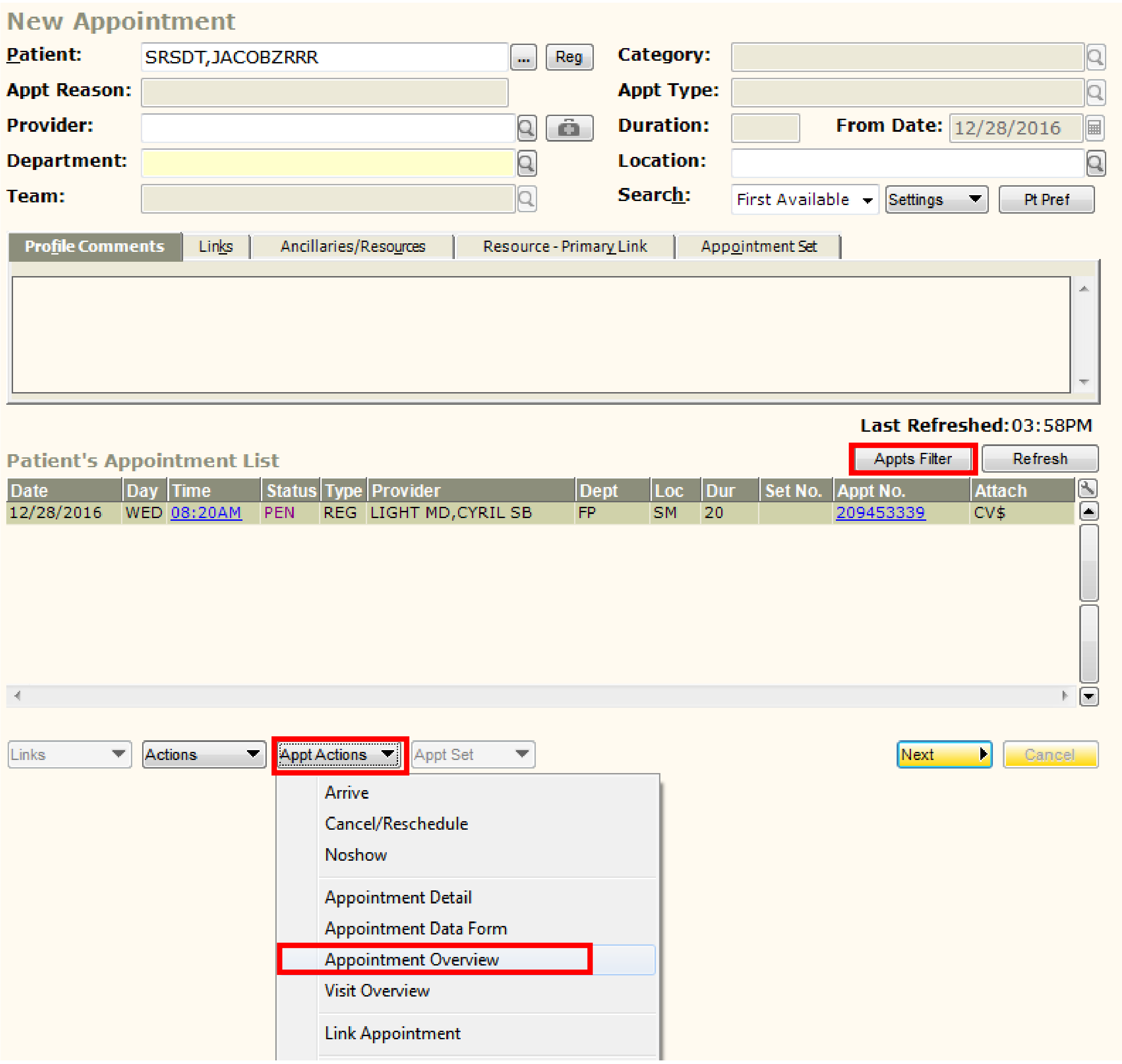
8. To print confirmation page, select  button at top of page.

Note: Informational text is listed in **RED** at the bottom of Credit Card Processing page, near .



How to Check-In a Patient:

1. Click **Scheduler (VTB)**
2. Pull up patient using **PatientSecure**

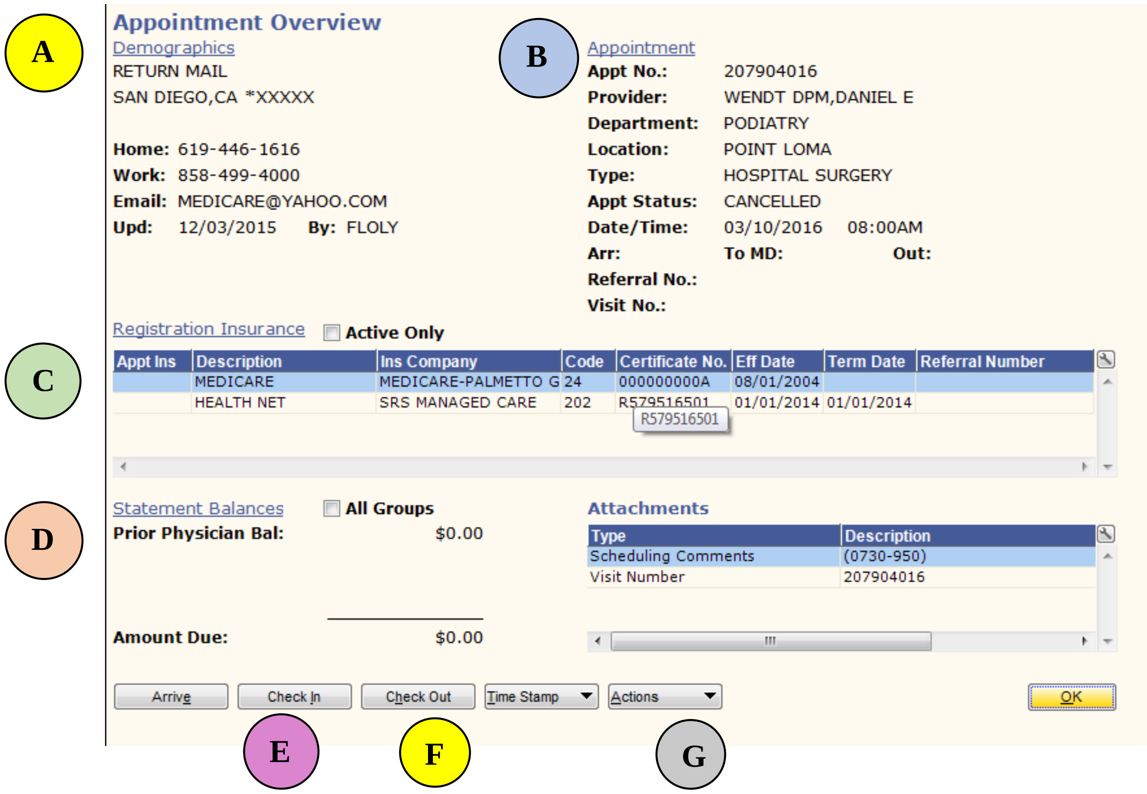


3. Use the **Appts Filter** button to **find the correct appointment**
4. **Highlight** the patients appointment for today (do not click on the hyperlinks)
5. Click **Appt Actions**
6. Select **Appointment Overview**

Appointment Overview

The Appointment Overview screen displays information for a given visit. You can access demographics, insurance, current balance, and visit information to verify or edit.

Appointment Overview Screen



A **Demographics**
Patient demographic information is displayed at the top. Click [Demographics] to edit

B **Appointment** - Visit-specific information includes the appointment date and the attending physician. Click [Appointment] to view Appointment Detail

C **Insurance** - Contains the insurances on file for the visit

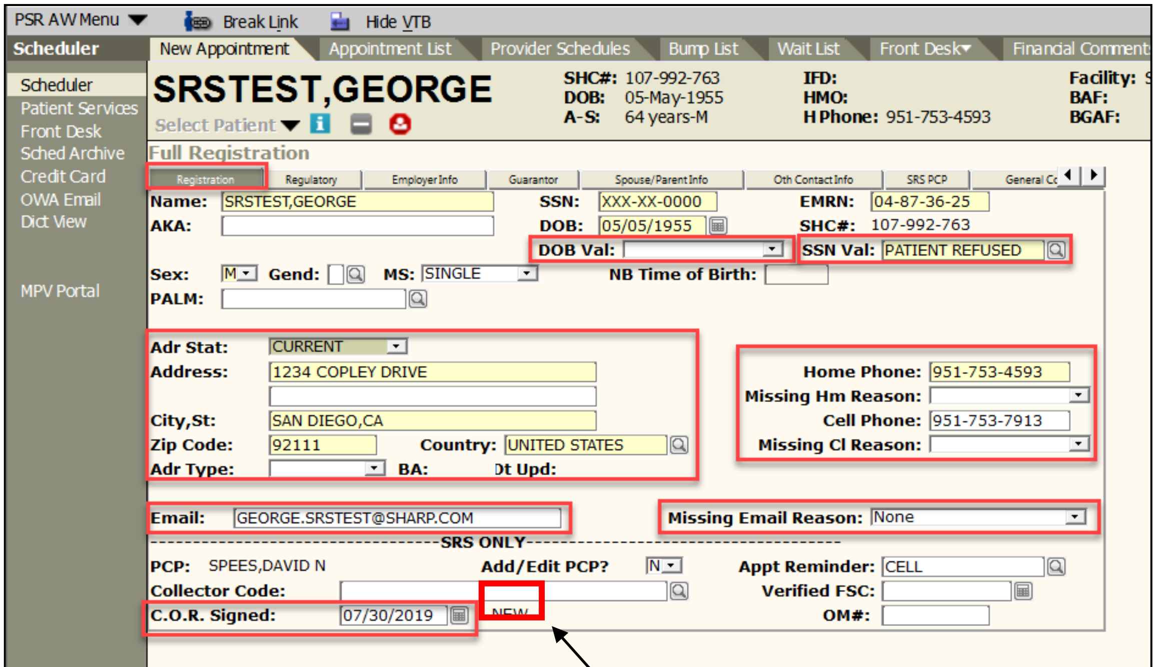
D **Statement Balances** - Patient financial information is displayed on the screen. Click [Statement Balances] to view the Statement Overview screen. This displays the patients last payment & budget plan details.

E **Check In** - Post appointment co-payments and deposits. This action will auto arrive the patient's appointment

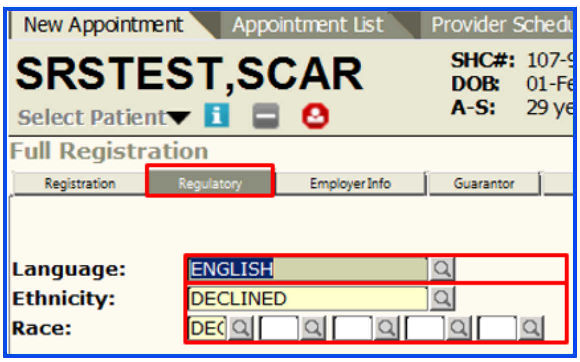
F **Check Out** - Post to past balances.

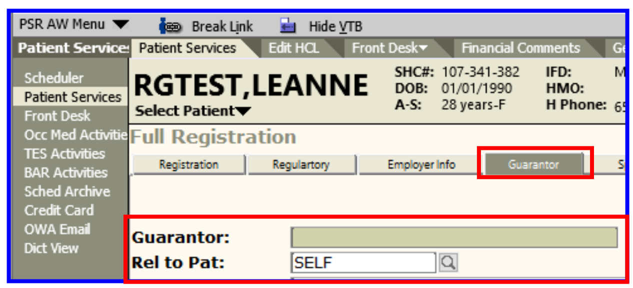
G **Actions** - To view additional tasks

7. Click **Demographics**



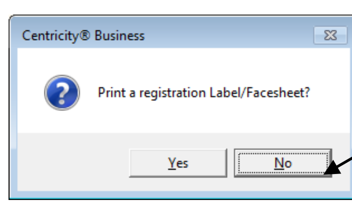
Note: if the HCL shows **NEW** → change to **EHR**



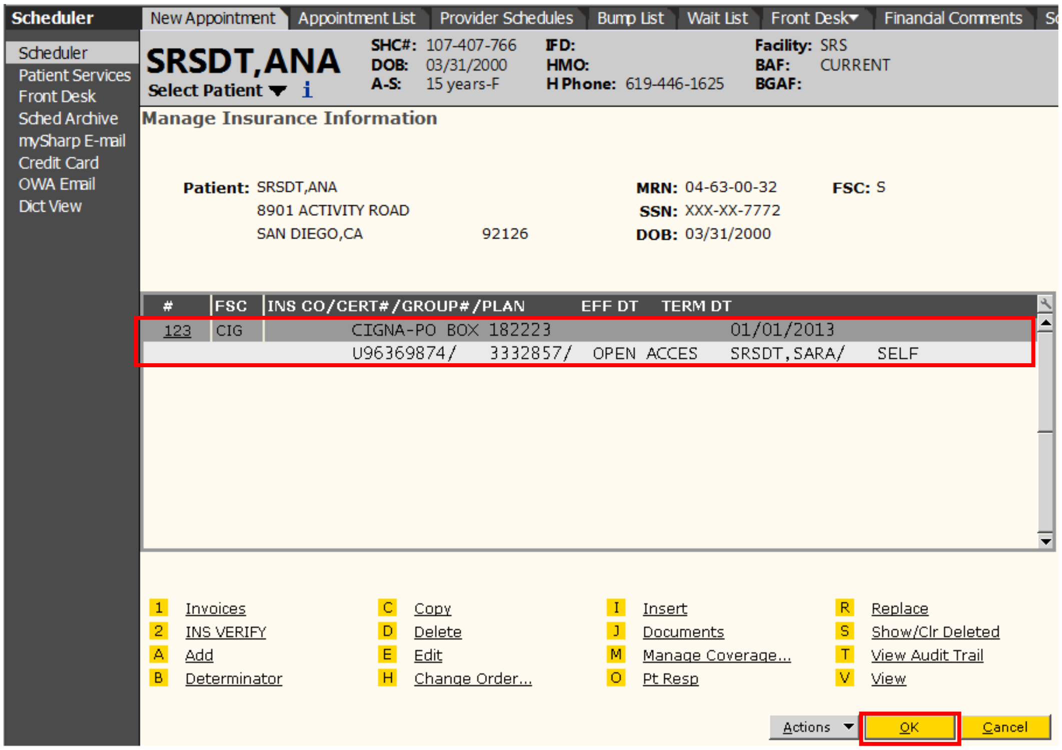


8. Verify and update the demographics:
   - **Home Chart Location (HCL)**
   - **Address**
   - **Adr Status**
   - **Phone number**
   - **e-mail**
   - **Collector Code**
   - **C.O.R. signed** (Conditions of Registration)
   - **Ethnicity & Race**
   - **Guarantor**

9. **Click OK** once complete



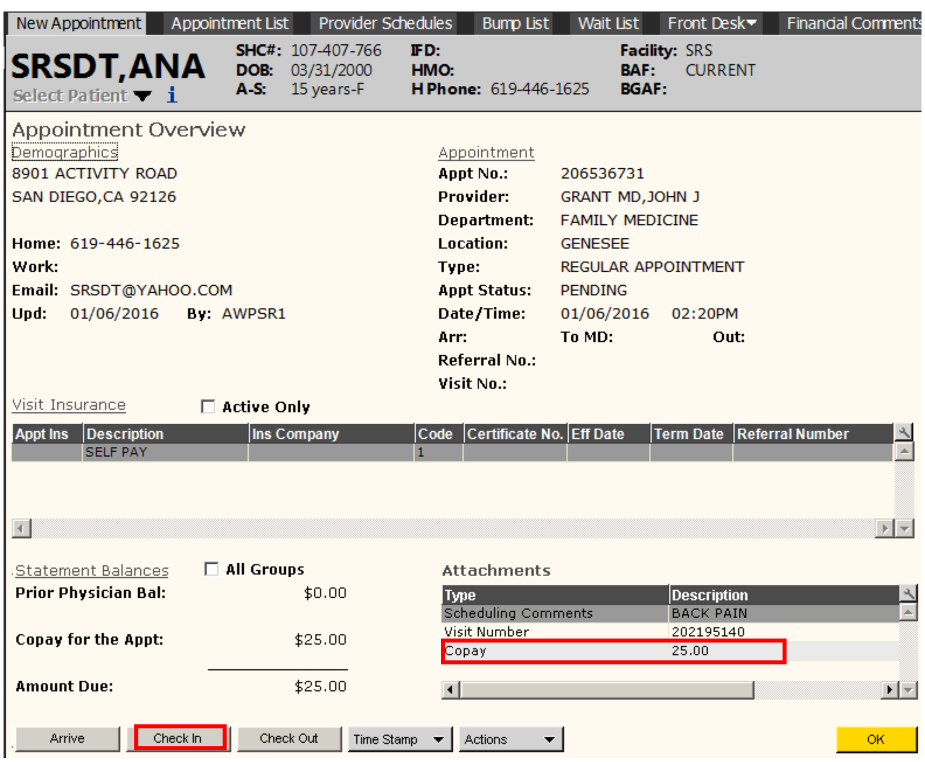
Note: Click 'NO'



10. Verify the insurance company & member ID on the **insurance card**

- It should match what is seen on this screen
- If there is a term date verify it has not passed

11. Click **OK**



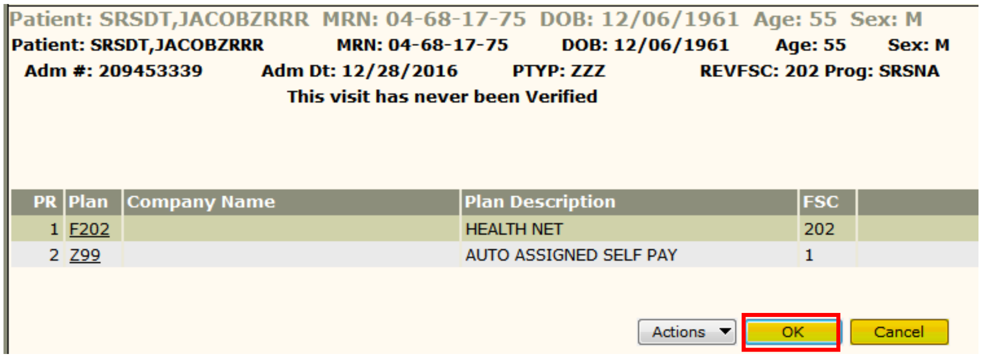
Note: Confirm the patient responsibility before check in.

Clicking "Check In" will arrive the patient and prompt you to collect the copay.

12. Click **Check In**

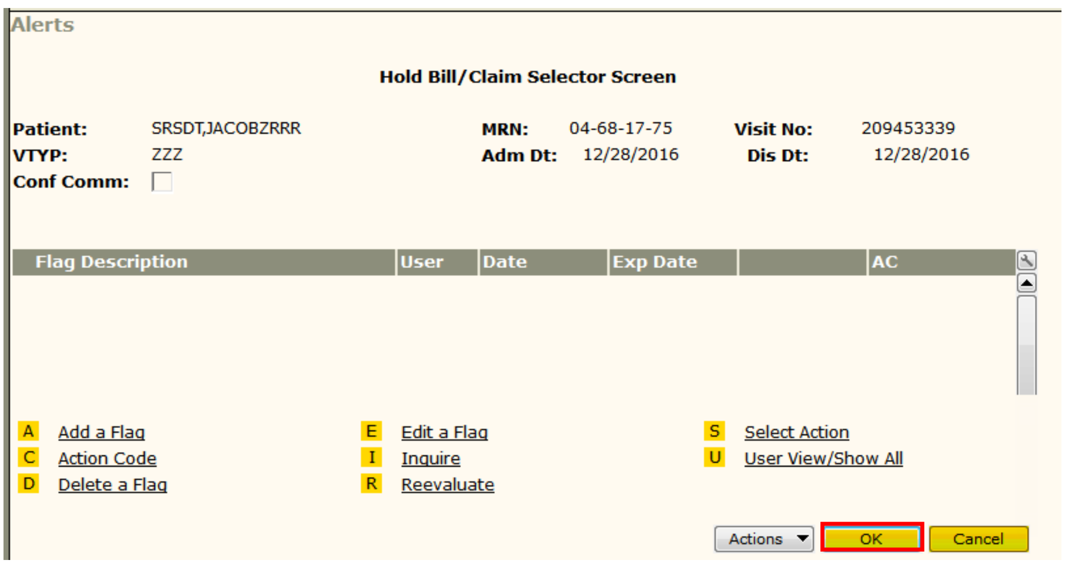
13. Verify Insurance Screen will display

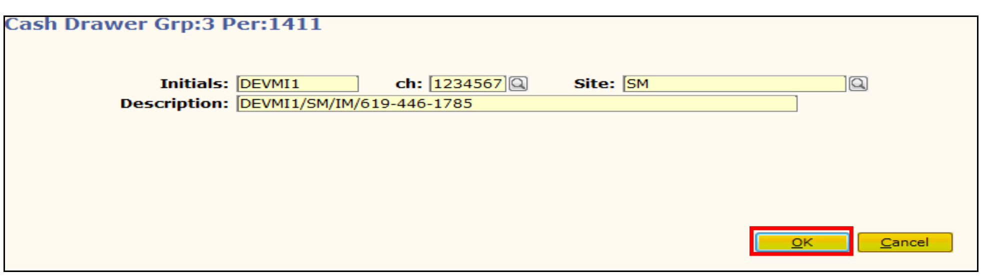
14. Click **OK**



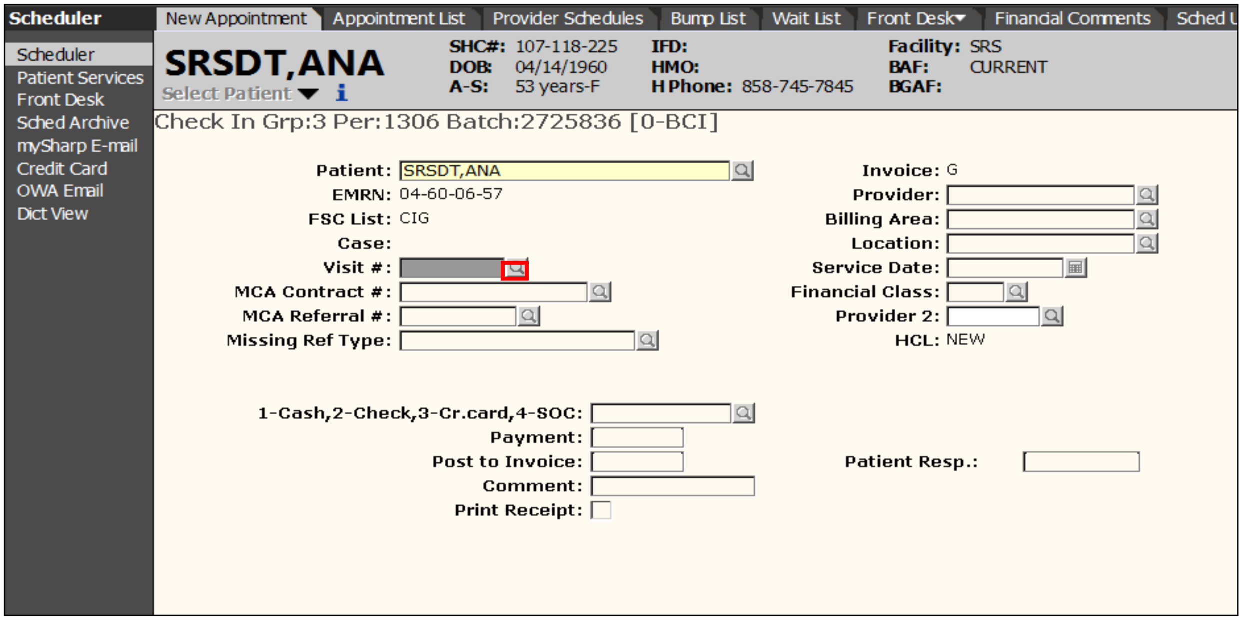
15. Alerts screen will display. Correct any alerts that need to be addressed.

16. Click **OK**



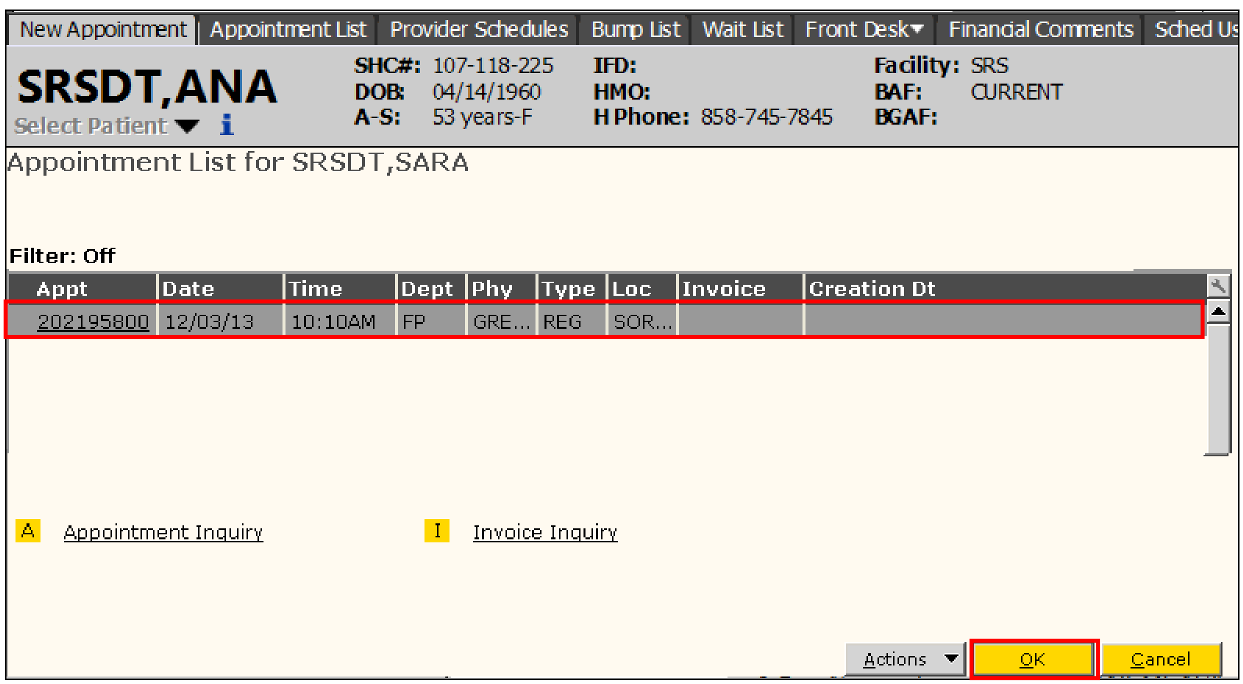


17. Click **OK** at **Cash Drawer**



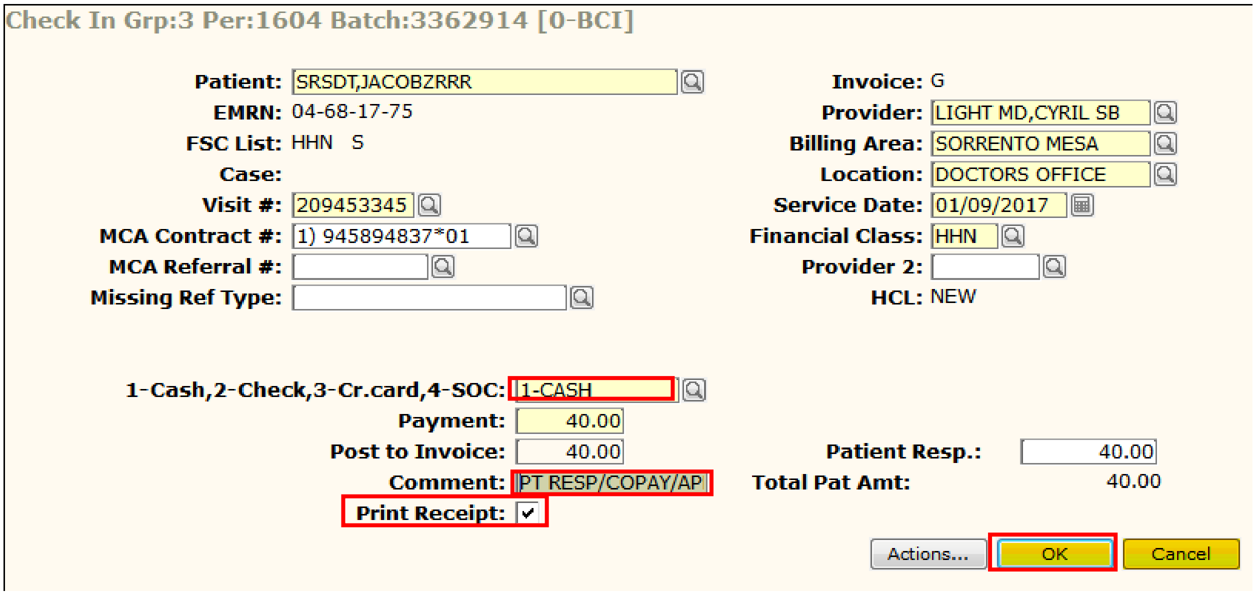
18. Press **Tab**

- At **Visit #** Type a **?** and Press **Tab** or click the **magnifying glass**



19. **Highlight** the correct appointment (do not click the appointment number)

20. Click **OK**



21. Select the appropriate **payment type**

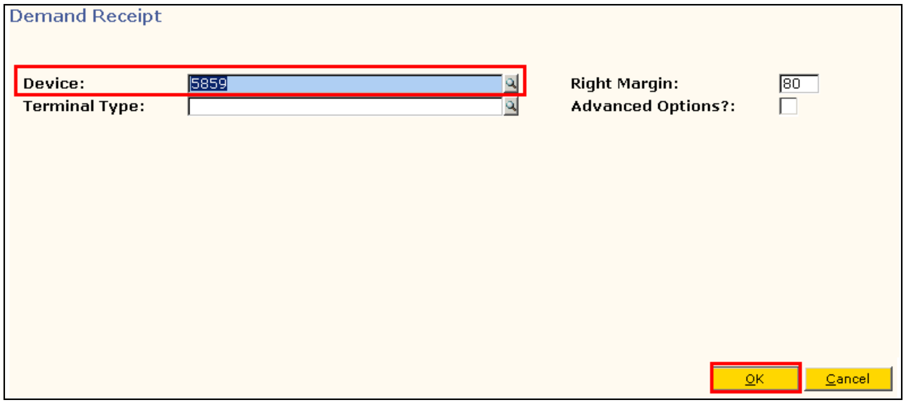
1 – Cash
2 – Check
3 – Credit Card

22. Type the **receipt comments** and press **Tab** (or check mark the **'Print Receipt' box)**

Examples of Documentation (refer to policy and procedure):

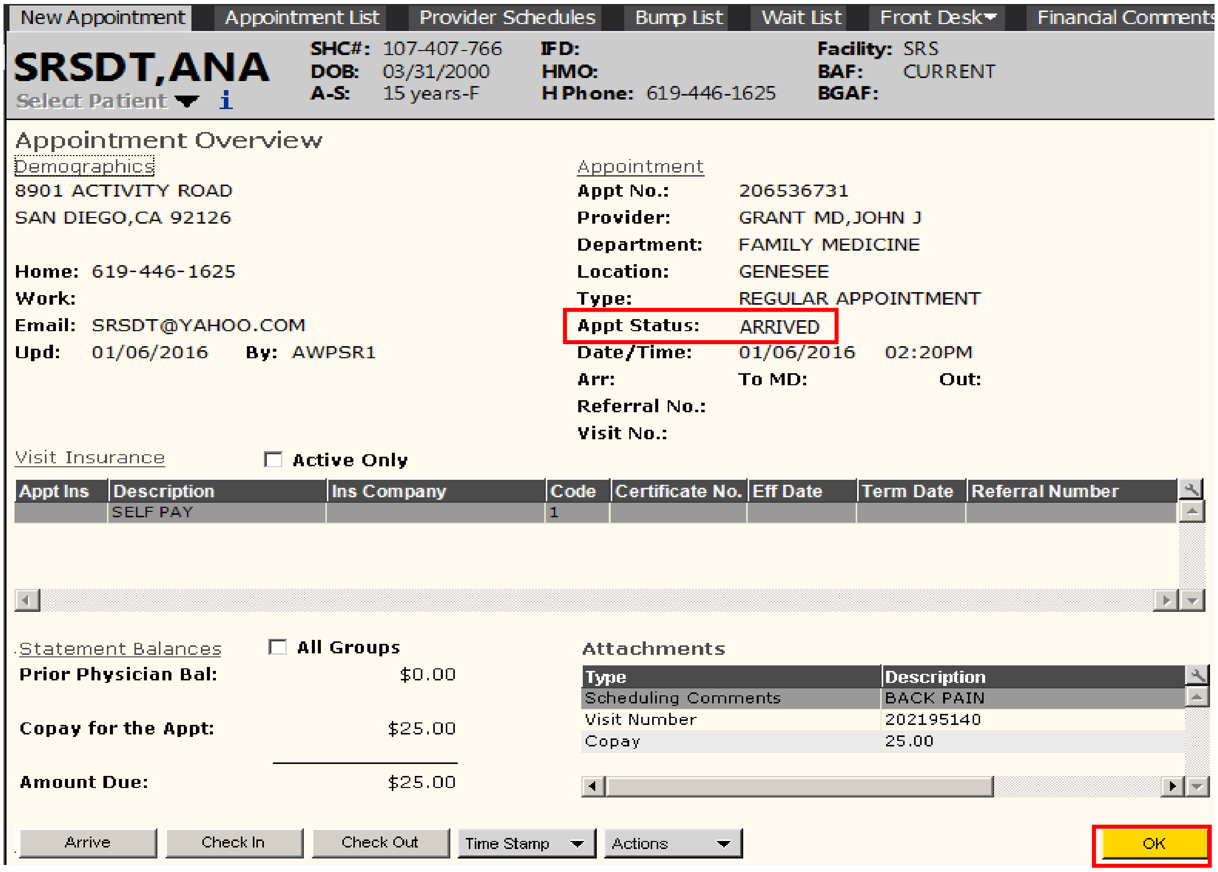
Comment:	Pt Resp/Copay/Appt/Cash
Comment:	Pt Resp/Copay/Appt/CK#1234
Comment:	Pt Resp/Copay/Appt/CC Conf #12345678

23. Click **OK**



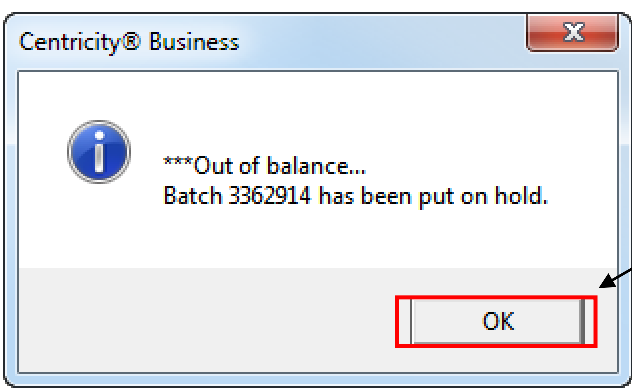
24. Select your **printer device** and click **OK**

Basic Check-In



25. Verify that the patient has been **ARRIVED**

26. Click **OK**

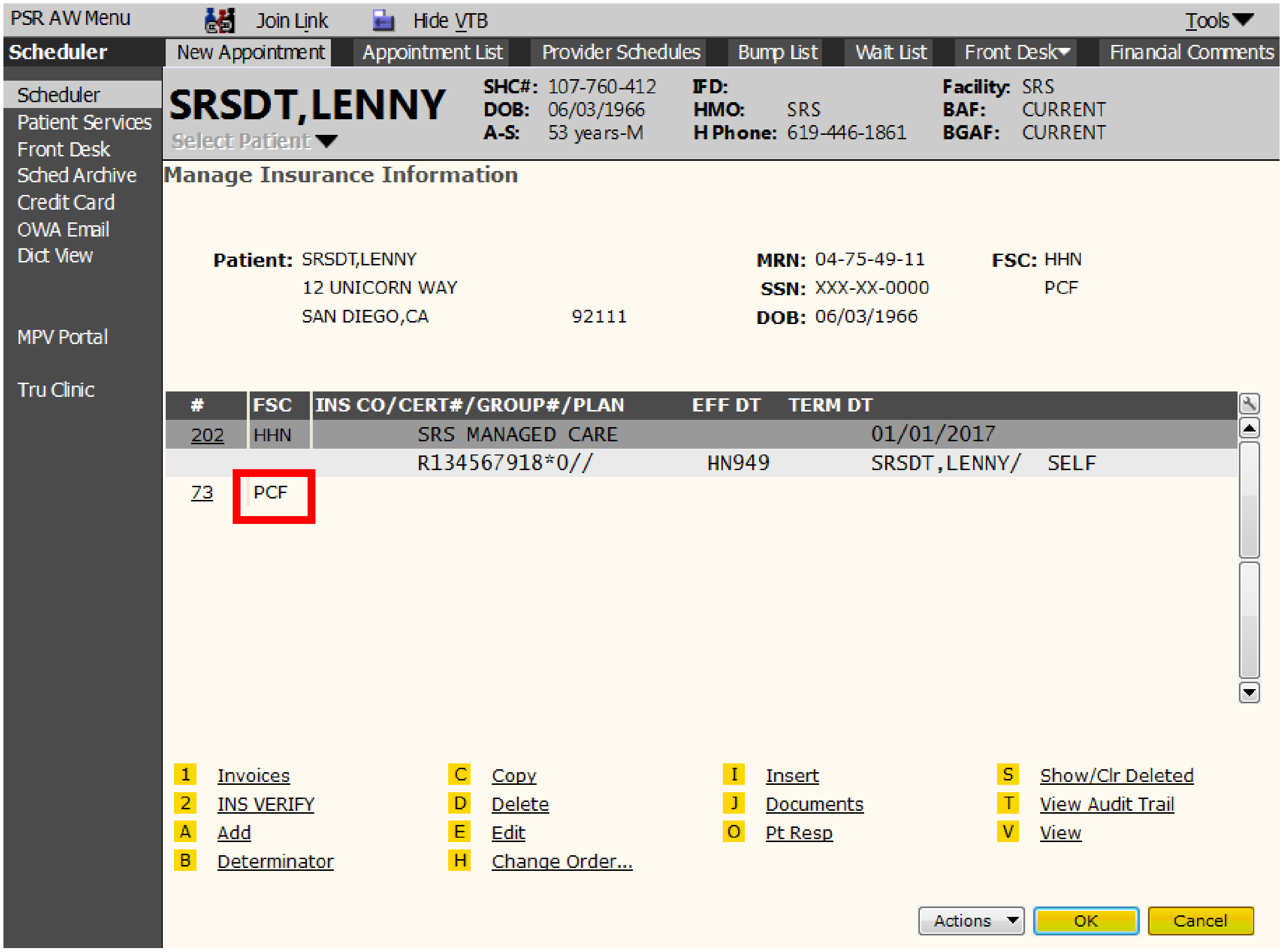


Note: you will be ***** Out of balance…** until you balance your batch at the end of your shift.

27. Click **OK**

The Physician Copay Fund (PCF)

*What if you see a **PCF** FSC when verifying a patient's insurance?*



- Arrive the patient and **DO NOT** collect a copay.

PHYSICIAN and SRSMG Employee CO-PAYs

When eligible SRSMG physicians, Nurse Practitioners (NP), Physician Assistants (PA) and SRSMG employees receive care at an SRS location, Patient Service Representatives (PSRs) are to arrive the patient and do not collect the generated co-pay when checking in these eligible patients.

Eligible SRSMG providers and employees are identified by either indicator below:

- PCF FSC – if this required FSC is not present, add FSC 73 to the secondary position
- MDD collector code is present

Eligible SRSMG providers**:**

- Active SRSMG physicians, NPs, PAs and SRSMG employees and their covered dependents **enrolled with SRSMG through the Sharp Health Plan HMO** are eligible for this benefit
- Retired physicians/spouses enrolled with an HMO plan for seniors, such as Secure Horizons or Health Net Seniority Plus

Eligible SRSMG employees:

- Receive their paychecks from the medical group (not Sharp HealthCare)

Note: Questions regarding eligibility are directed to Lori Miller at SRSMG Physician Services, 858-262-6070.

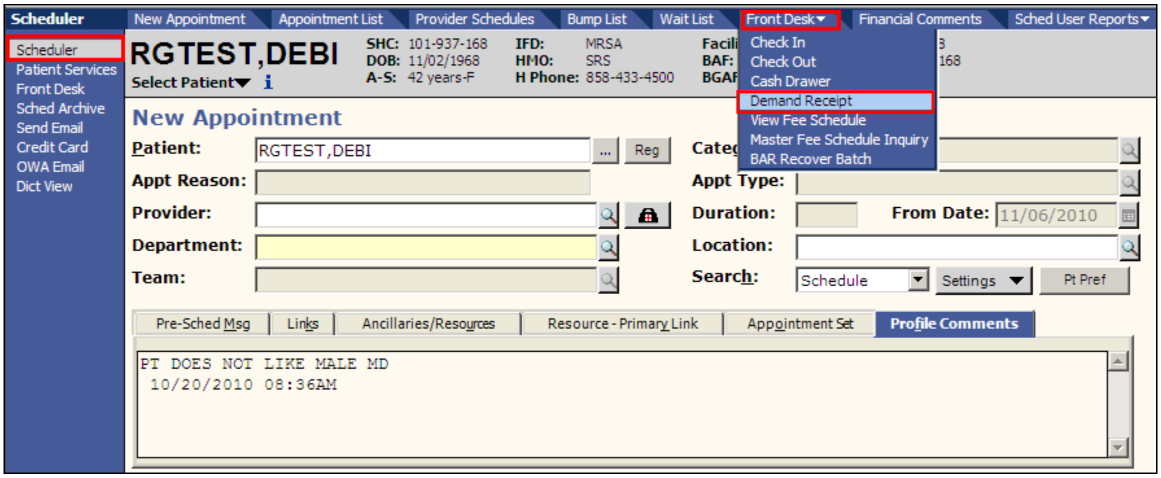
Excluded co-pays are the responsibility of the physician/SRSMG employee/dependent and retired physician/spouse and include but are not limited to:

- Allergy Testing
- Allergy injections
- Medically necessary home visit
- Hospital co-pays
- Mental health outpatient co-pays
- Health intervention programs
- Norplant insertion
- Voluntary sterilization (male or female)
- Pregnancy Termination services (Abortion services)
- Infertility services
- Vision Services (patient to submit copy of bill for eye exam to Physician Services)

9/12/19

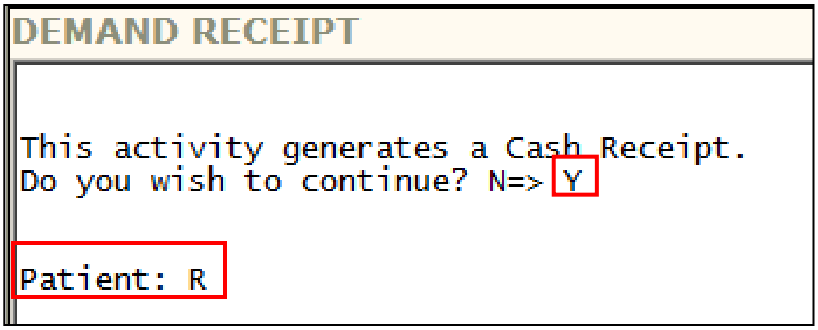
How to Reprint a Receipt:

Note: Make sure the patient is in the Patient Banner before reprinting the receipt.



1. **Pull up patient** using PatientSecure

2. Click on **Front Desk** (HTB) and select **Demand Receipt**



3. **Type Y** then press **Enter**

4. **Type R** and press **enter** (this will recall the patient that is in the Patient Banner Bar)

```
PATIENT: TANNER,DANNY   MR# 04-09-05-90    01/05/1967 M              GROUP: 3
SSN: XXX-XX-6896

2001 4TH AVE  SAN DIEGO,CA  92101-2303  619-446-1515
PATIENT'S EMPLOYER: US BANK  2020 SANFRANSCICO DR  SAN FRANCISCO,CA 94117
                    619-446-1533

PR  FSC             INS CO/CERT#/GROUP#/PLAN           EFF DT     TERM DT

 1  109    BCC      BLUE CROSS NAT PO BOX 60007        01/01/2010
                    XYZ123A56789/Z154/     PPO         TANNER,DANN/  SELF


ACCOUNTS IN GROUPS:  3
ACCOUNT IN PCS WORKFILE(S): 1206 (3)
Registered on: 02/04/2010  By: EBBBE
Last Updated:  08/25/2010  By: EBBBE
```

5. Press **Enter**

```
PATIENT: TANNER,DANNY   MR# 04-09-05-90    01/05/1967 M              GROUP: 3
SSN: XXX-XX-6896

2001 4TH AVE  SAN DIEGO,CA  92101-2303  619-446-1515
PATIENT'S EMPLOYER: US BANK  2020 SANFRANSCICO DR  SAN FRANCISCO,CA 94117
                    619-446-1533

PR  FSC             INS CO/CERT#/GROUP#/PLAN           EFF DT     TERM DT

 1  109    BCC      BLUE CROSS NAT PO BOX 60007        01/01/2010
                    XYZ123A56789/Z154/     PPO         TANNER,DANN/  SELF


ACCOUNTS IN GROUPS:  3
ACCOUNT IN PCS WORKFILE(S): 1206 (3)
Registered on: 02/04/2010  By: EBBBE
Last Updated:  08/25/2010  By: EBBBE

 SSN changed on 02/04/10, was: DOB changed on 02/04/10, was: Address line 1
 changed on 02/04/10, was: Phone number changed on 02/04/10, was:

No PCS comments on file
Current Statement Balance:  -120.00
Last Patient Payment: 20.00 (08/24/2010)
Last Run #: 204 Balance:  120.00CR Date: 07/01/2010 Dunning Level: 0 Cycle: 4
Account Status: STANDARD Date: 06/02/2010 Initials: IDX Statement Run #: 203

Open Cases: 0    Closed Cases: 0    Archived Cases: 0

Invoice Number: ?U
```

6. Press **Enter** *until* you see **"Invoice Number"**

7. At Invoice Number, type **?U** to display a list of invoices and press **Enter**

Reprinting Receipts

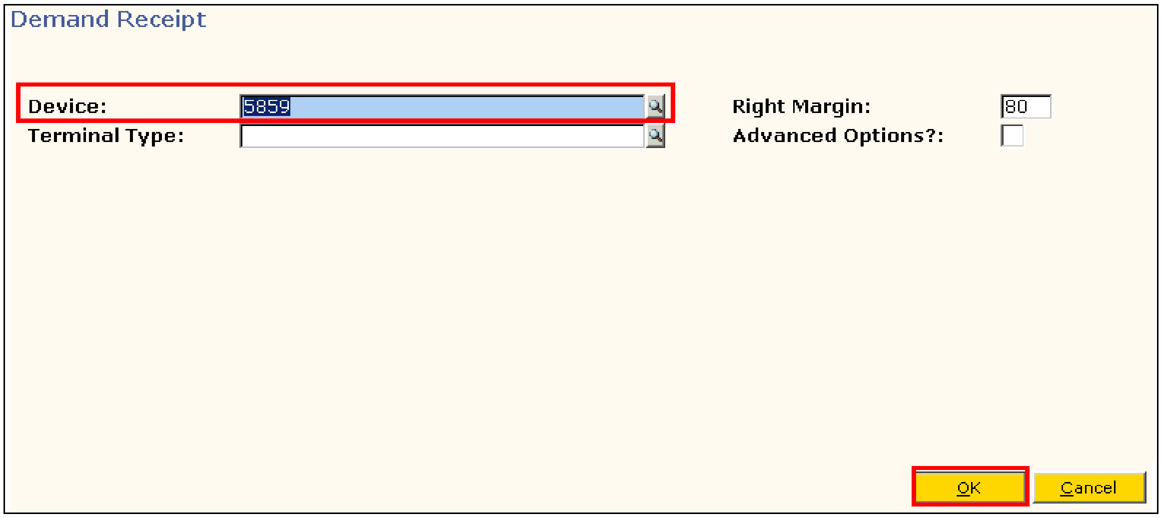
```
 CENTER BLVD Address line 1 changed from: 8695 SPECTRUM CENTER BLVD to: 1234
 ABC ST

No PCS comments on file
Current Statement Balance:     0.00
Last Patient Payment: 150.00 (10/18/2012)
Last Run #: 242 Balance:   19.21p Date: 01/07/2012 Dunning Level: 1 Cycle: 1
Account Status: STANDARD Date: 04/19/2008 Initials: IDX Statement Run #: 197

Open Cases: 0    Closed Cases: 0    Archived Cases: 0

Invoice Number: ?U
?U


    INVOICE#  ADM/VIS  DISCH    PATIENT  MD      LOC HO BA CHARGES    FSC BALANCE

32)  53790052 10/14/12          DANNY TA J GRAN DO      DT  150.00    S     0.00
31)  49335457 03/24/10          DANNY TA J BARG DO      LM  369.00    S     0.00
        ORIG:49335454
30)  49335455 03/24/10          DANNY TA J BARG DO      LM  280.00CR DNB    0.00
        ORIG:49335454 NEW:49335457
29)  49335454 03/24/10          DANNY TA J BARG DO      LM  280.00   DNB    0.00
        ORIG:48149526 NEW:49335457
28)  49335453 03/24/10          DANNY TA J BARG DO      LM  280.00CR DNB    0.00
        ORIG:48149526 NEW:49335454
27)  49335450 03/01/10          DANNY TA J BARG DO      LM  369.00    S     0.00
        ORIG:49335444
26)  49335447 03/01/10          DANNY TA J BARG DO      LM  280.00CR DNB    0.00
        ORIG:49335444 NEW:49335450
25)  49335444 03/01/10          DANNY TA J BARG DO      LM  280.00   DNB    0.00

DISPLAY DETAIL FOR INVOICE [<CR> TO CONTINUE, OR TYPE 'STOP']: STOP
```

8. Locate the number **<u>on the far left side</u>** that matches the invoice #

9. Once you see the invoice you need to print, Type **STOP** (uppercase) and press **Enter** (this will stop the list from scrolling further)

```
13)  42316171 08/24/10          DANNY TA S GREE DO      MM     0.00    BCC  10.00CR
12)  42316170 08/24/10          DANNY TA S GREE DO      MM     0.00    BCC  10.00CR
11)  42307296 04/27/10          DANNY TA C LITT DO      DT   500.00    S     0.00
10)  42304952 04/09/10          DANNY TA B FOWL DO      SA     0.00    BCC  10.00CR
9)   42304644 04/06/10          DANNY TA B FOWL DO      SA     0.00    BCC  10.00CR
8)   42304397 03/23/10          DANNY TA S GREE DO      MM     0.00    BCC  10.00CR
7)   42304310 03/17/10          DANNY TA S GREE DO      MM     0.00    PRO 120.00CR
6)   42304308 03/17/10          DANNY TA S GREE DO      MM     0.00    BCC  10.00CR
5)   42304301 03/17/10          DANNY TA S GREE DO      MM     0.00    BCC 100.00CR
4)   42303726 02/24/10          DANNY TA B FOWL DO      SA     0.00    BCC  10.00CR
3)   42303724 02/24/10          DANNY TA B FOWL DO      SA    84.00    BCC  84.00
2)   42303567 02/08/10          DANNY TA T SIEF DO      OR     0.00    BCC  10.00CR
1)   42303564 02/08/10          DANNY TA J GRAN DO      GEN    0.00    BCC  10.00CR
                                                  TOTAL   584.00        226.00CR

DISPLAY DETAIL FOR INVOICE [<CR> TO CONTINUE, OR TYPE 'STOP']: 13
13

    INVOICE#  ADM/VIS  DISCH    PATIENT  MD      LOC HO BA CHARGES    FSC BALANCE

13)  42316171 08/24/10          DANNY TA S GREE DO      MM     0.00    BCC  10.00CR


    Posted    Service        Description       Payments  Adjust  Charges FSC Batch
 1)08/24/10              523 CASH/CHECK PAYMENT
                                                 10.00
                             CASH                                           2024910

Division: FAMILY PRACTICE

DISPLAY DETAIL FOR INVOICE:

INVOICE NUMBER TO PRINT ON CASH RECEIPT : 13
```

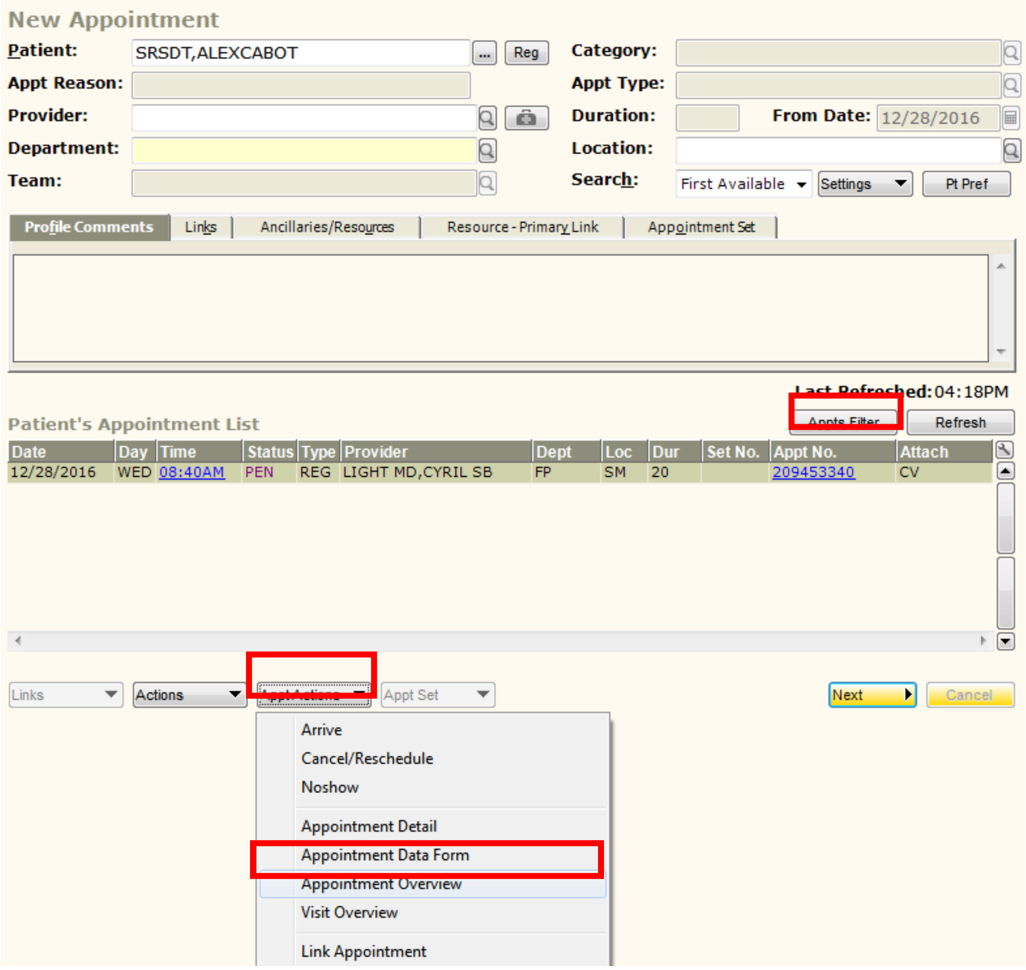
10. Type the number of the invoice at: **“Invoice Number to Print On Cash Receipt”** and press **Enter**



11. Confirm the printer device number

12. Click **OK**

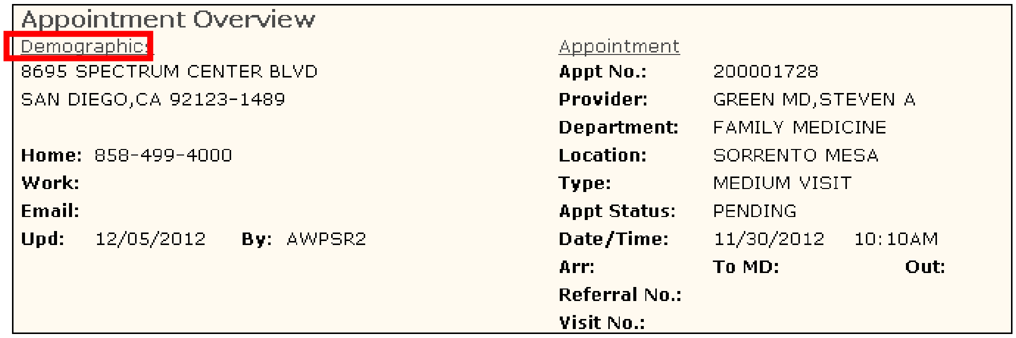
How to Collect a Self Pay Deposit:



1. Use the **Appts Filter** button to find the correct appointmentHighlight the patients appointment for today (do not click on the hyperlinks)

2. Click **Appt Actions**

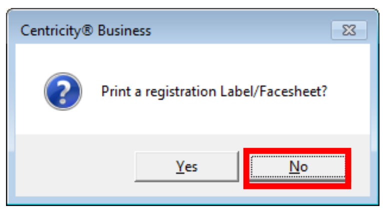
3. Select **Appointment Overview**



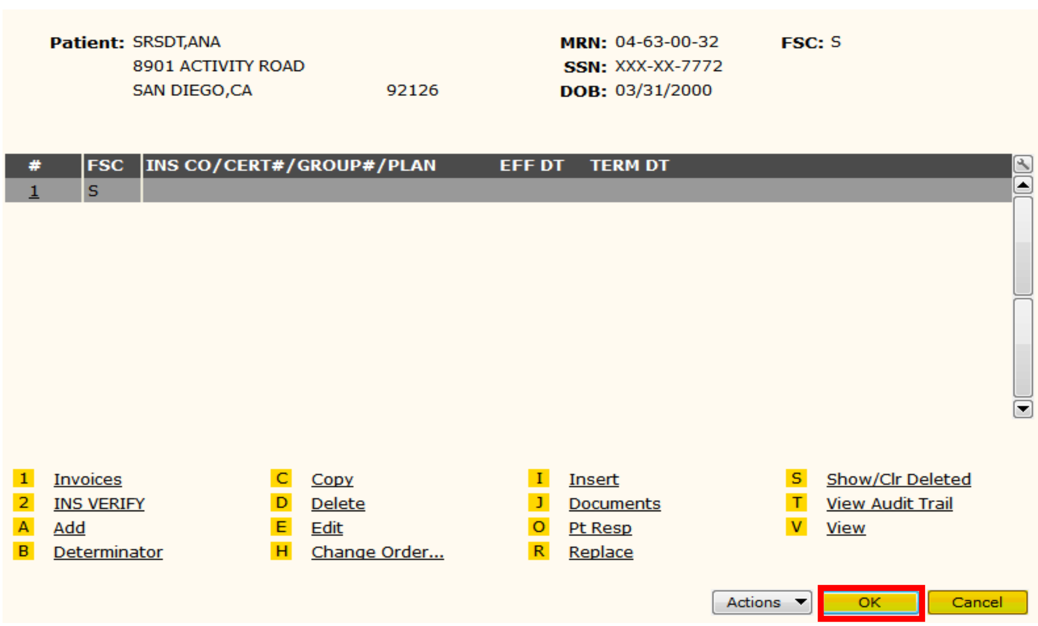
4**.** Click **Demographics**

5. **Verify and update the demographics**, home chart location (HCL), Adr Status, e-mail, collector code, and C.O.R. signed (Conditions of Registration)

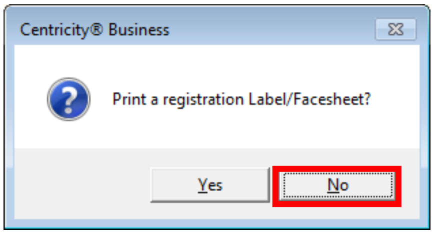
- Verify each additional screen of the registration
- Once completed, click **OK**



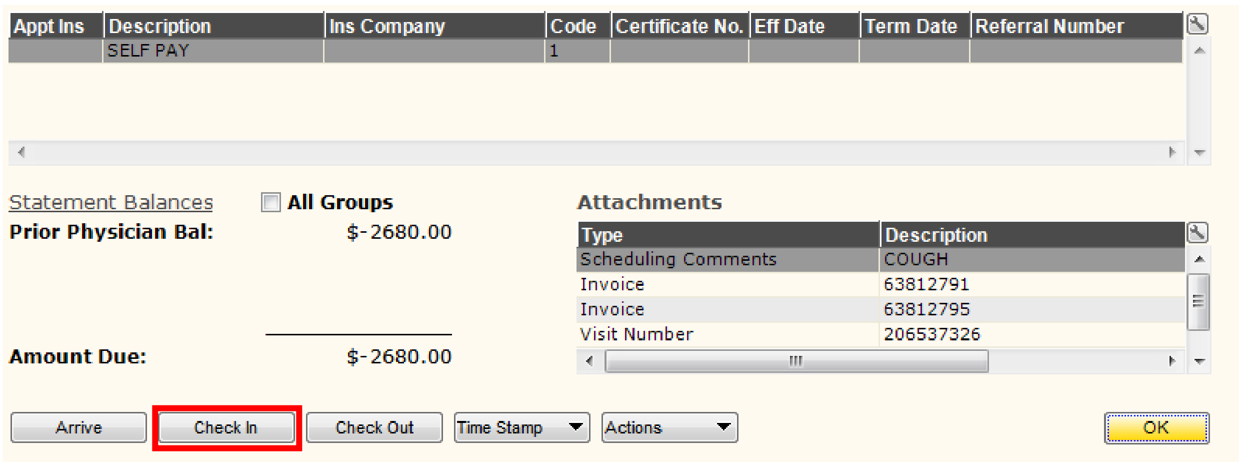
6. Click **No** at Print a registration Label/Facesheet?



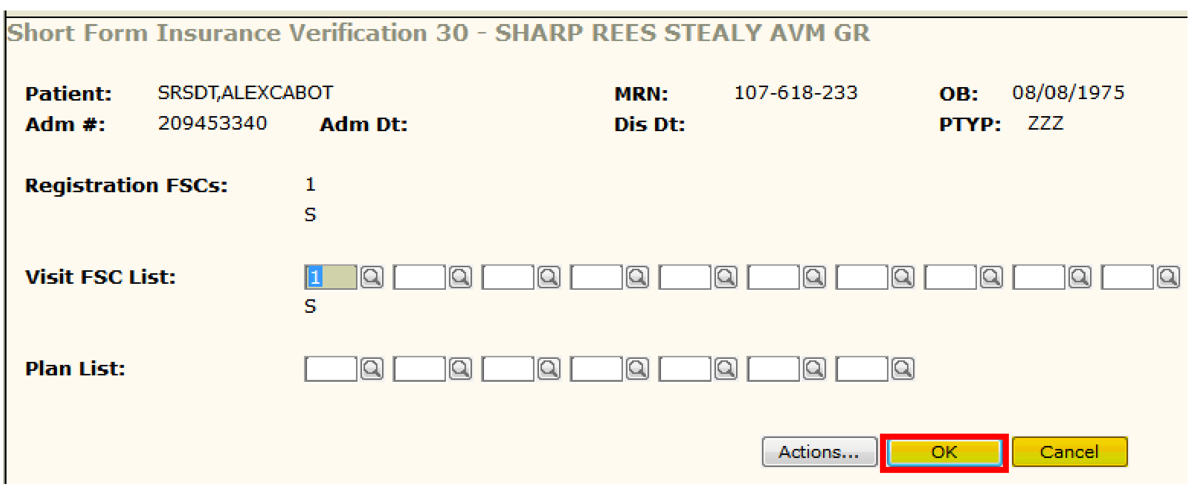
7. Click **OK** at the Manage Insurance Information screen.



8. Click **No** at Print a registration Label/Facesheet?

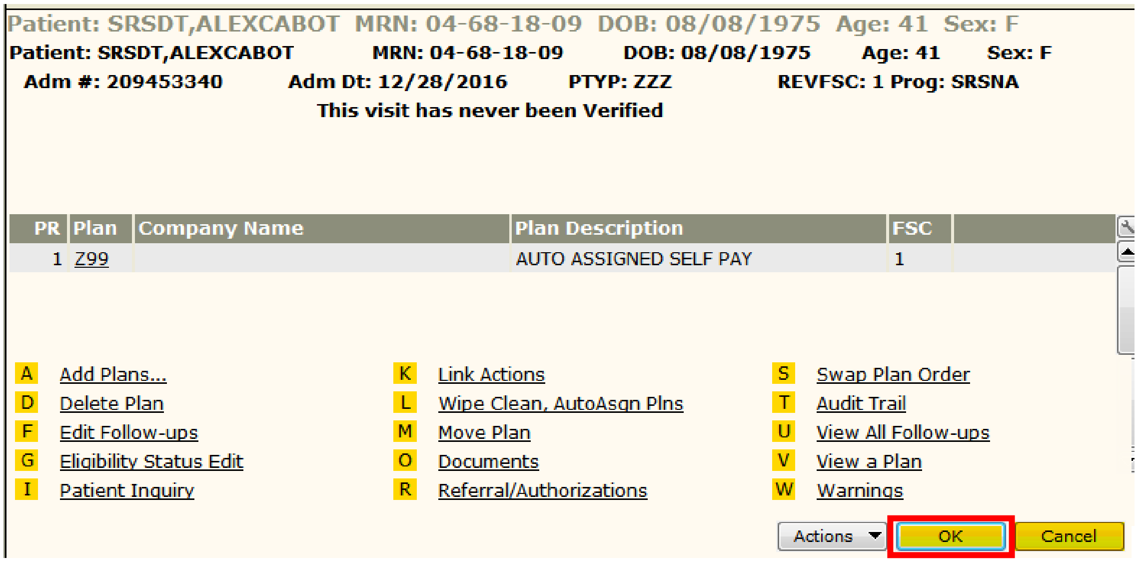


9. Click **Check In**



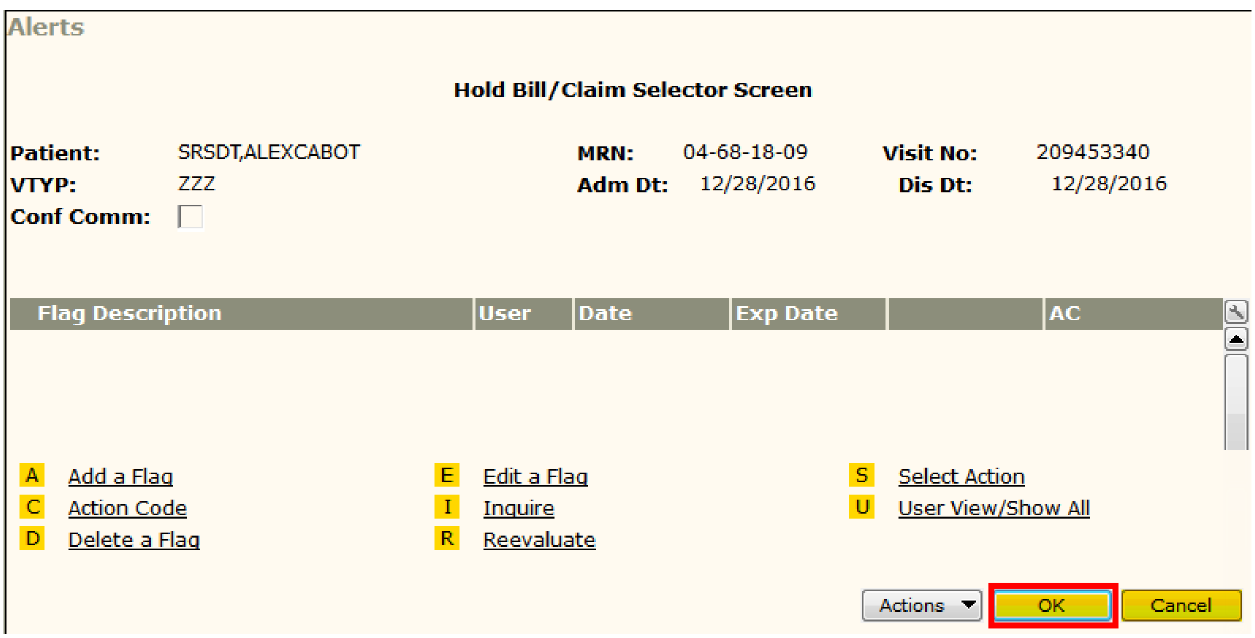
10. Short Form Insurance Verification screen will display

11. Click **OK**



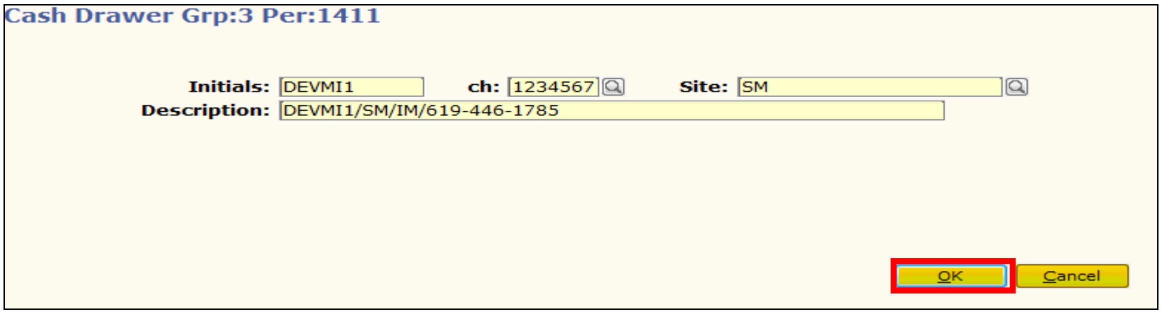
12. **Verify Insurance Screen** will display

13. Click **OK**

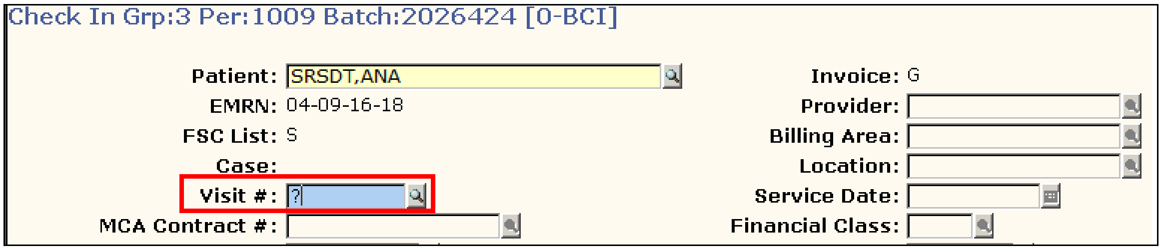


14. Alerts screen will display. Correct any alerts that need to be addressed.

15. Click **OK**

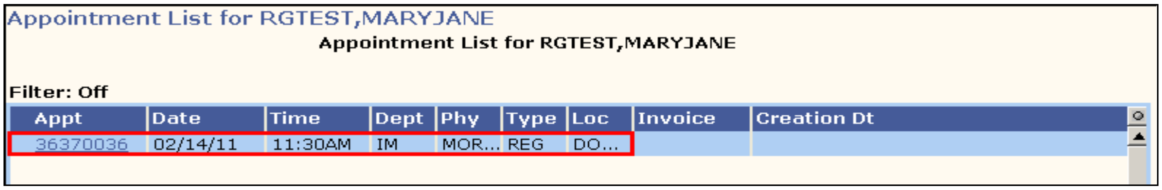


16. Click **OK** at Cash Drawer



17**. Tab** to the **Visit #**

18. Type a **?** and Press **Tab** or click the **magnifying glass**



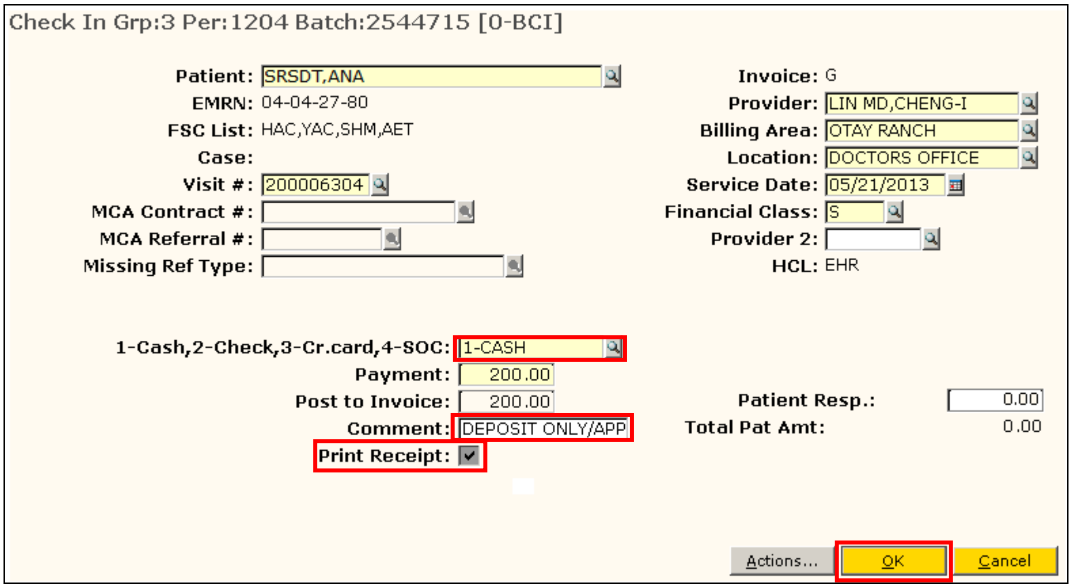
19. Click on the **correct appointment** (do not click the hyperlink)

20. Click **OK**

Ask for patient self-pay deposit (refer to SRS P&P15504.99)

- New Patient $200
- Established Patient $130
- Out-of-State New Patient $250
- Urgent Care
    - New - $250

Collecting a Self Pay Deposit

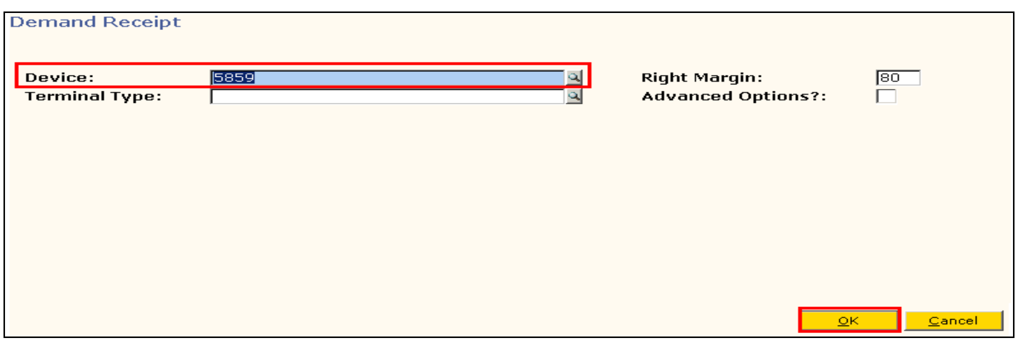


21. Select the appropriate **payment type**

22. Type the **receipt comments**

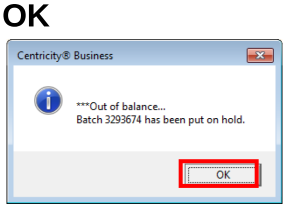
Examples of Documentation (refer to policy and procedure):

Comment:	Deposit Only/Appt/Cash
Comment:	Deposit Only/Appt/CK#1234
Comment:	Deposit Only/Appt/CC Conf #12345678

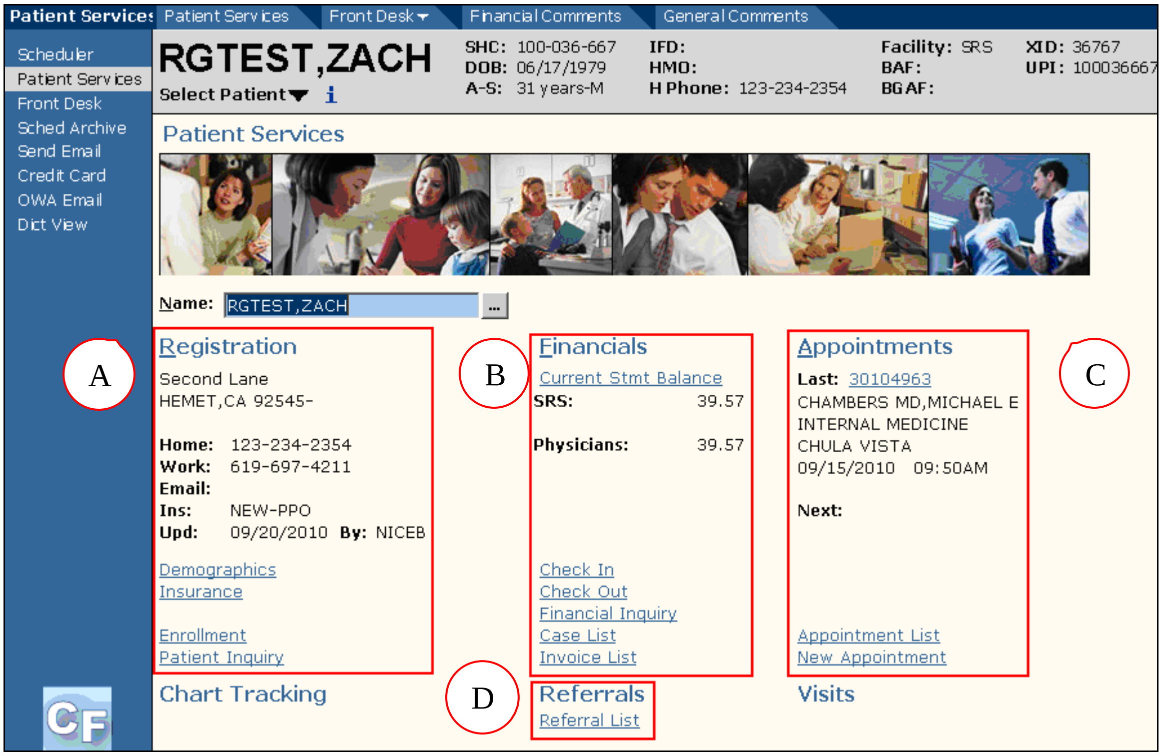


23. Type or confirm the Device

24. Click **OK**



The Patient Services screen is central access point for all information related to a single patient. Using hyperlinks, Patient Services gives you access to appointment, demographic, insurance, financial, and visit information.



A

Registration Information

In addition to displaying basic demographic information, the registration section of the Patient Services screen includes the following hyperlinks:

- **Demographics** accesses complete demographic information for the patient.
- **Insurance** accesses complete Insurance and FSC information.
- **Enrollment** is used for patients enrolled in Managed Care insurance.
- **Patient Inquiry** provides an additional path for accessing complete patient information.

B ***Financial Information***

- In addition to displaying statement balance information, the Financials section of the Patient Services screen includes the following hyperlinks:
- **Check In** accesses the check-in process for your patient.
- **Check Out** accesses the check-out process for your patient.
- **Financial Inquiry** allows you to view financial records by group and by FSC.
- **Case List** provides a list of cases attached to the patient.
- **Invoice List** provides a list of the invoices for your patient.

C ***Appointment Information***

In addition to displaying information about the patient's next and last appointments, the Appointments section of the Patient Services screen includes the following hyperlinks:

- **Appointment List** is a complete list of the patient's appointments.
- **New Appointment** provides access to the New Appointment screen in Scheduling Homebase.

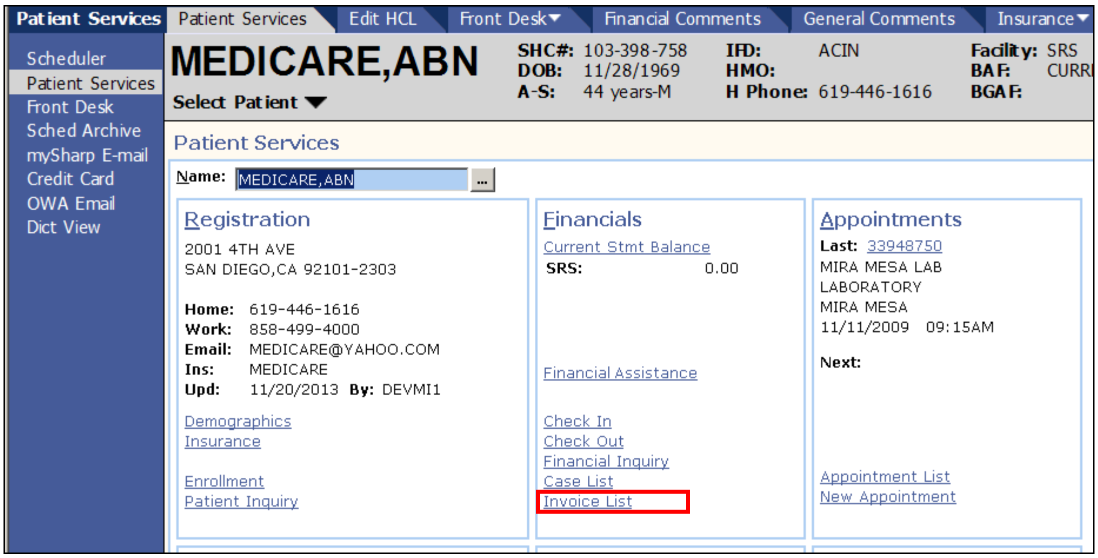
D **Referral List** is a complete list of referrals for that patient.

How to Display Past Balances (Invoice List):

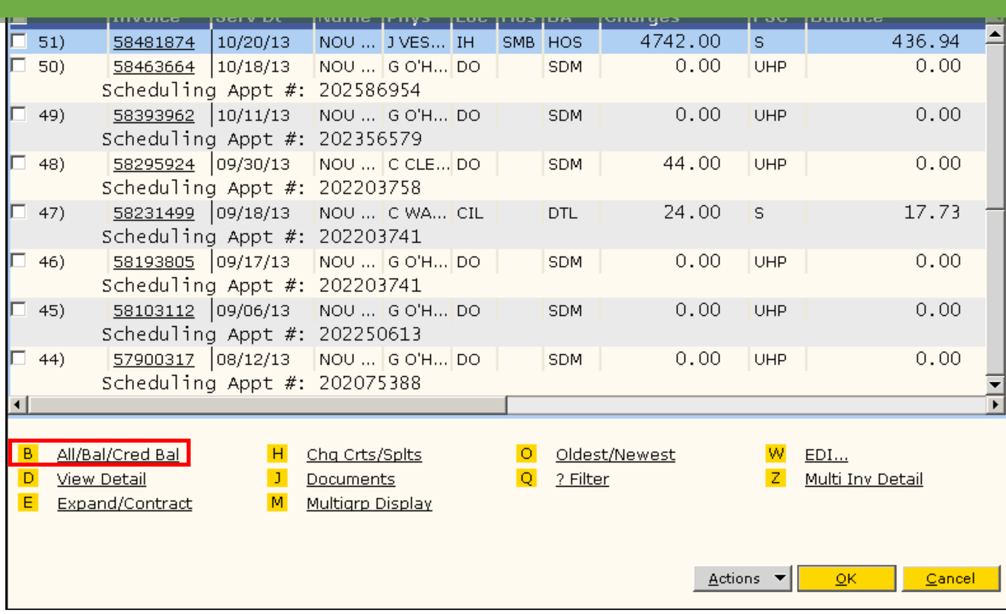
Display balances allow the user to view any charges the patient owes to Sharp HealthCare.

1. Click on **Patient Services** on the VTB

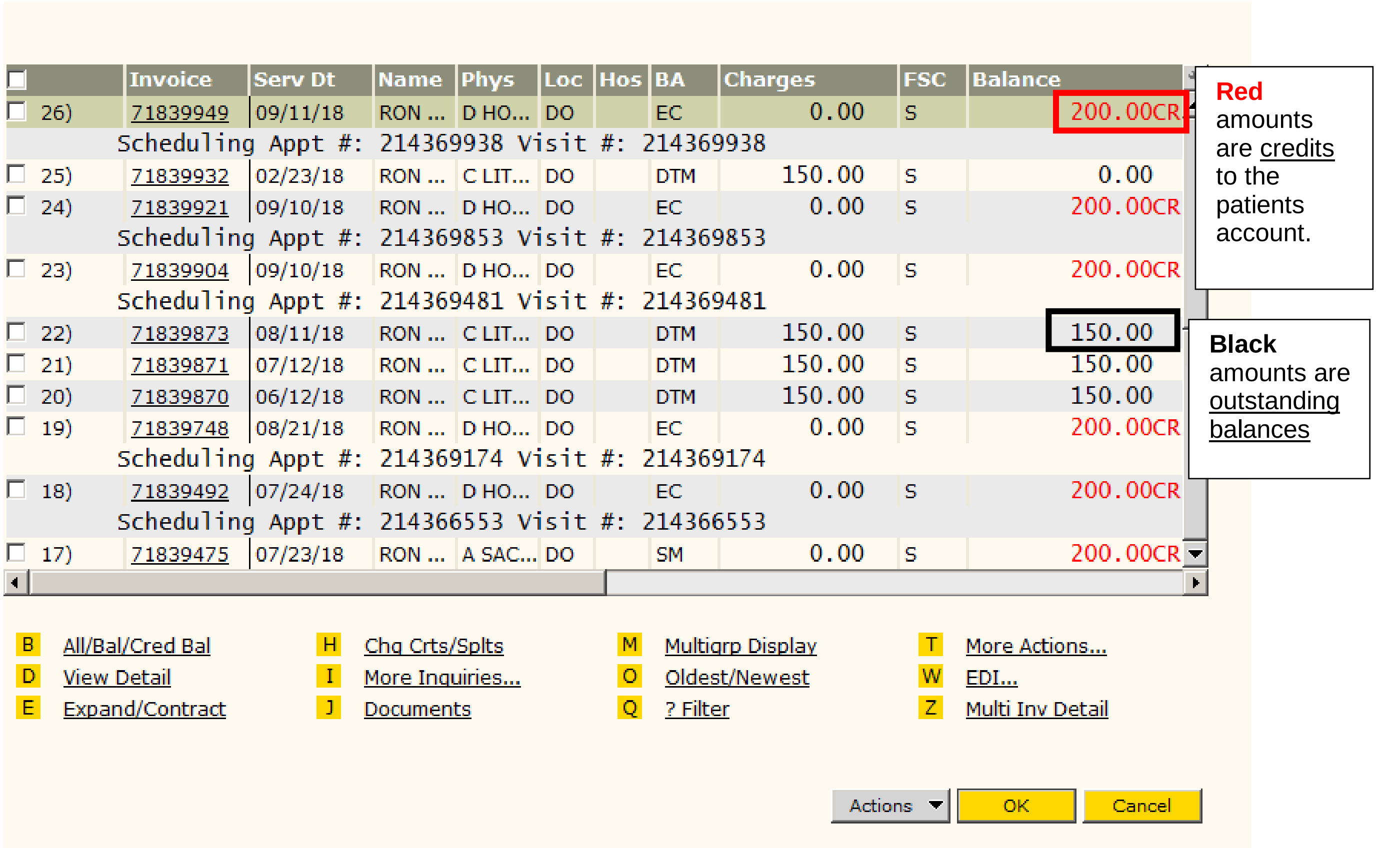
2. Click **Invoice List**



Patient Service Overview



Collecting Balance Tips



	Invoice	Serv Dt	Name	Phys	Loc	Hos	BA	Charges	FSC	Balance
26)	71839949	09/11/18	RON ...	D HO...	DO		EC	0.00	S	200.00CR
	Scheduling Appt #: 214369938 Visit #: 214369938									
25)	71839932	02/23/18	RON ...	C LIT...	DO		DTM	150.00	S	0.00
24)	71839921	09/10/18	RON ...	D HO...	DO		EC	0.00	S	200.00CR
	Scheduling Appt #: 214369853 Visit #: 214369853									
23)	71839904	09/10/18	RON ...	D HO...	DO		EC	0.00	S	200.00CR
	Scheduling Appt #: 214369481 Visit #: 214369481									
22)	71839873	08/11/18	RON ...	C LIT...	DO		DTM	150.00	S	150.00
21)	71839871	07/12/18	RON ...	C LIT...	DO		DTM	150.00	S	150.00
20)	71839870	06/12/18	RON ...	C LIT...	DO		DTM	150.00	S	150.00
19)	71839748	08/21/18	RON ...	D HO...	DO		EC	0.00	S	200.00CR
	Scheduling Appt #: 214369174 Visit #: 214369174									
18)	71839492	07/24/18	RON ...	D HO...	DO		EC	0.00	S	200.00CR
	Scheduling Appt #: 214366553 Visit #: 214366553									
17)	71839475	07/23/18	RON ...	A SAC...	DO		SM	0.00	S	200.00CR

Credits on patient accounts are payments patients have made in excess to the clinics.
Outstanding Balances are amounts the patient is responsible for paying. These are for services they have received.

- If a patient wants to make a payment on multiple invoices, be sure to attach the payments to the correct visits.

- If the patient's account looks like it has a credit, do not subtract that from the invoice you are posting.

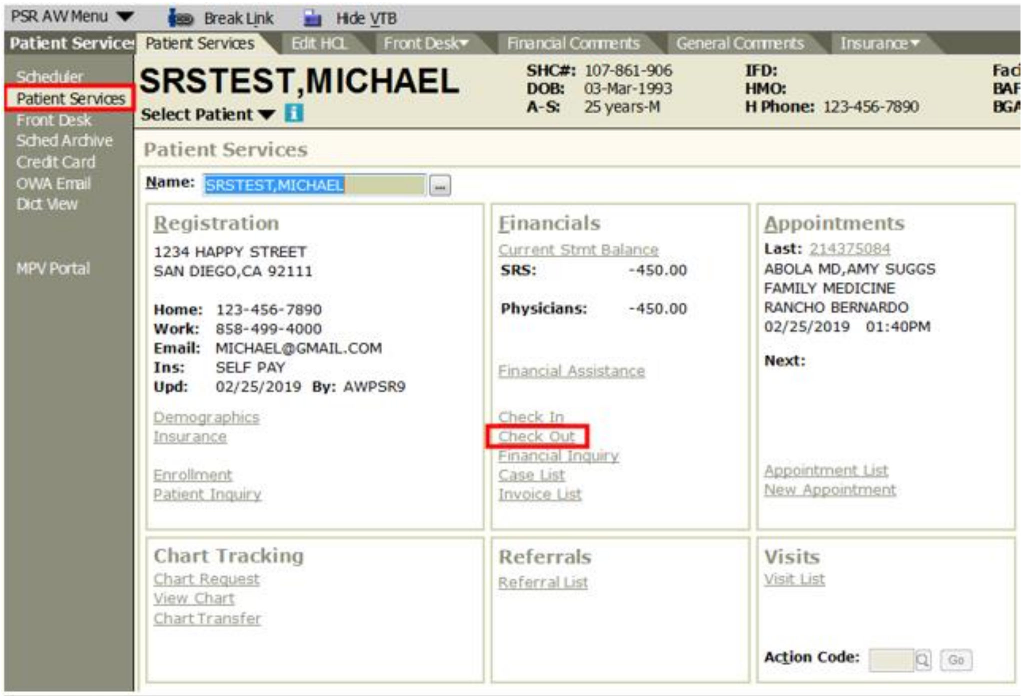
- If you have any questions or concerns while taking a payment, refer the patient to the Business Service Rep in the Business Office.

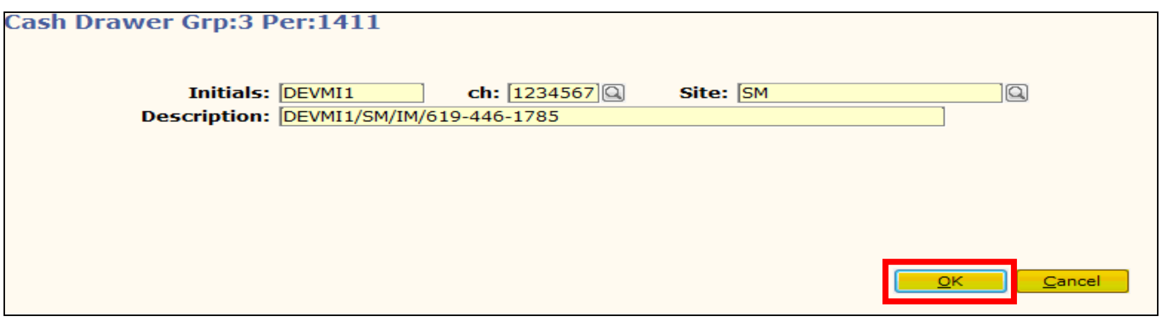
- Many small credit balances that appear are not <u>true</u> credits. Typically, co-payments from previous visits have not been matched up with a charge and they appear to be a credit. Do not address these small balances.

- Collecting a No-Show Fee is the same process. Click/check mark the No-Show Fee Invoice.

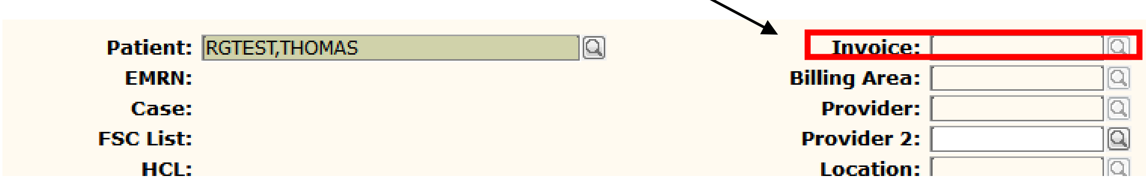
How to Collect Past Balances:

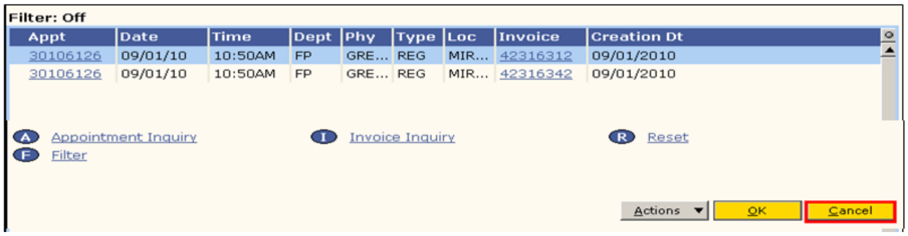
1. Click **Patient Services** (VTB)
2. Select **Check Out**



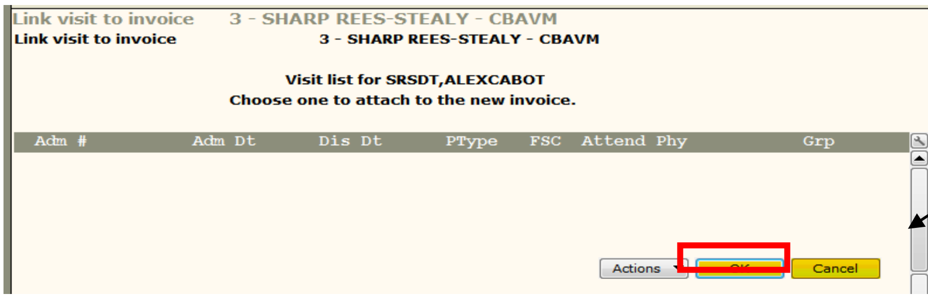


3. Click **OK** at the **Cash Drawer**
4. **Tab** to get to the **Invoice field**



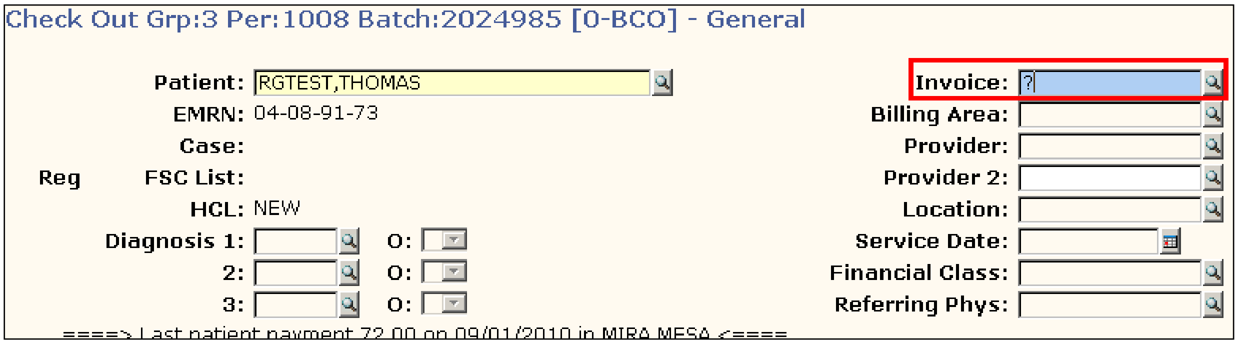


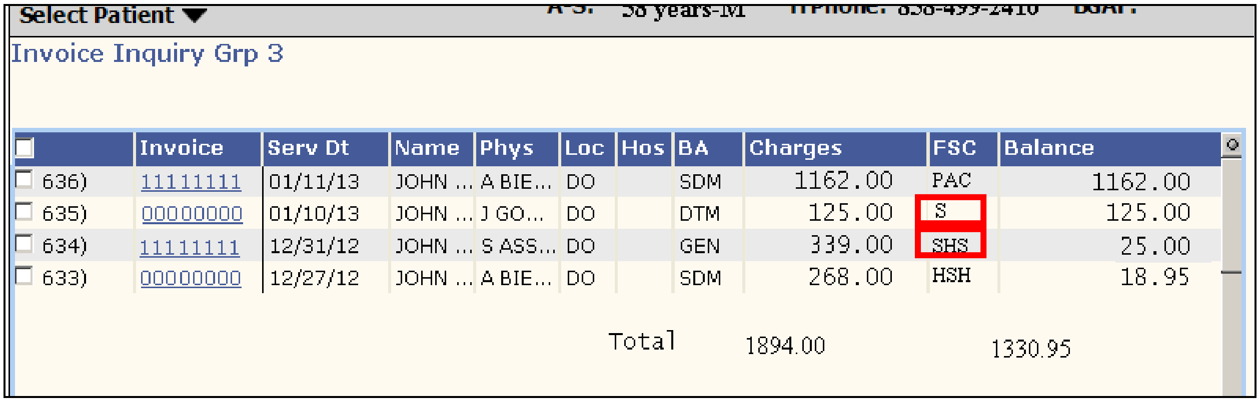
If the appointment list displays click **Cancel.**



Link visit to invoice screen displays Click **ok**

5. Type a **?** in the invoice field and Press **Tab** (or click the **magnified glass)**




Select Patient

Invoice Inquiry Grp 3

	Invoice	Serv Dt	Name	Phys	Loc	Hos	BA	Charges	FSC	Balance
636)	11111111	01/11/13	JOHN ...	A BIE...	DO		SDM	1162.00	PAC	1162.00
635)	00000000	01/10/13	JOHN ...	J GO...	DO		DTM	125.00	S	125.00
634)	11111111	12/31/12	JOHN ...	S ASS...	DO		GEN	339.00	SHS	25.00
633)	00000000	12/27/12	JOHN ...	A BIE...	DO		SDM	268.00	HSH	18.95
						Total		1894.00		1330.95

6. Click the **check box** for the correct invoice date

- **Only balances showing an S in the FSC column**

OR

- **HMO patient balances that show the HMO FSC <u>ending with S</u> are the patient's responsibility.**

Example: HSH (1st H is dropped) → S is added at the end = SHS

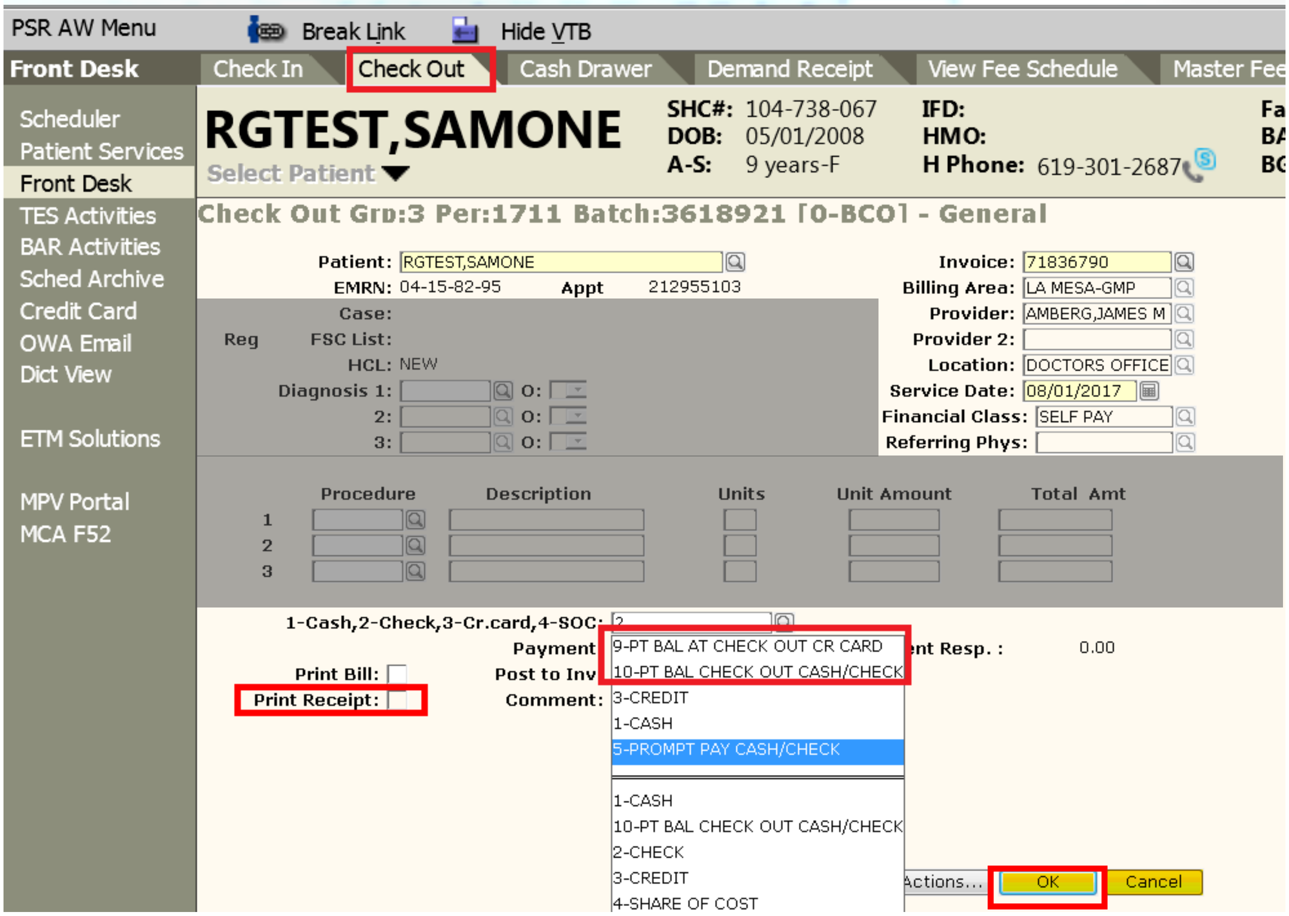
7. Click **OK**

Remember:

Red amounts are <u>credits</u> on the patient's account (that is what they have paid)

Black amounts are <u>balances</u> on the patient's account (that is what they are responsible for paying).

Collecting Past Balances / No-Show Fees



8. Select the correct **Payment Type**

9 - PT BAL at Check Out CR Card
10 - PT BAL Check Out Cash/Check

9. Type the appropriate comments

Examples of Documentation (refer to policy and procedure):

Comment:	Payment on Balance/Appt/Cash
Comment:	No Show Fee/Appt/CC Conf #12345678

10. Click the Print Receipt check box

- Click **OK**
- Confirm the correct Printer Device
- Click **Ok**

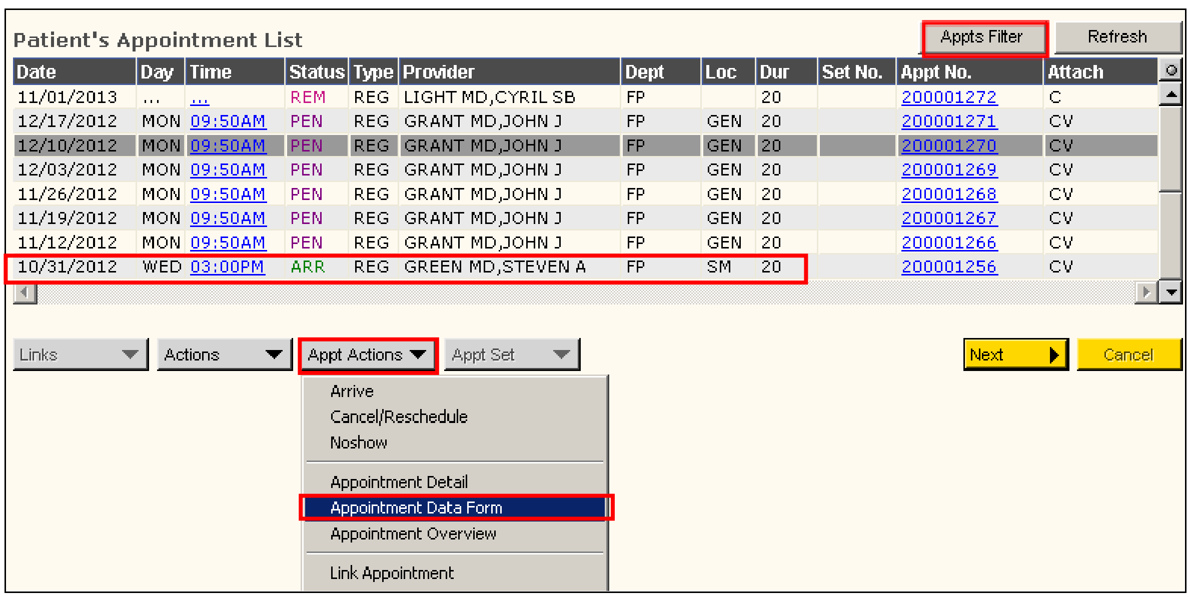
You may need to cancel an arrived appointment if a patient was checked-in and could not wait to be seen by a provider.

- Arrived appointments **must be converted to PENDING** before they can be cancelled.

How to Cancel an Arrived Appointment:

1. Use **Appts Filter** to find the patient's **arrived appointment.**

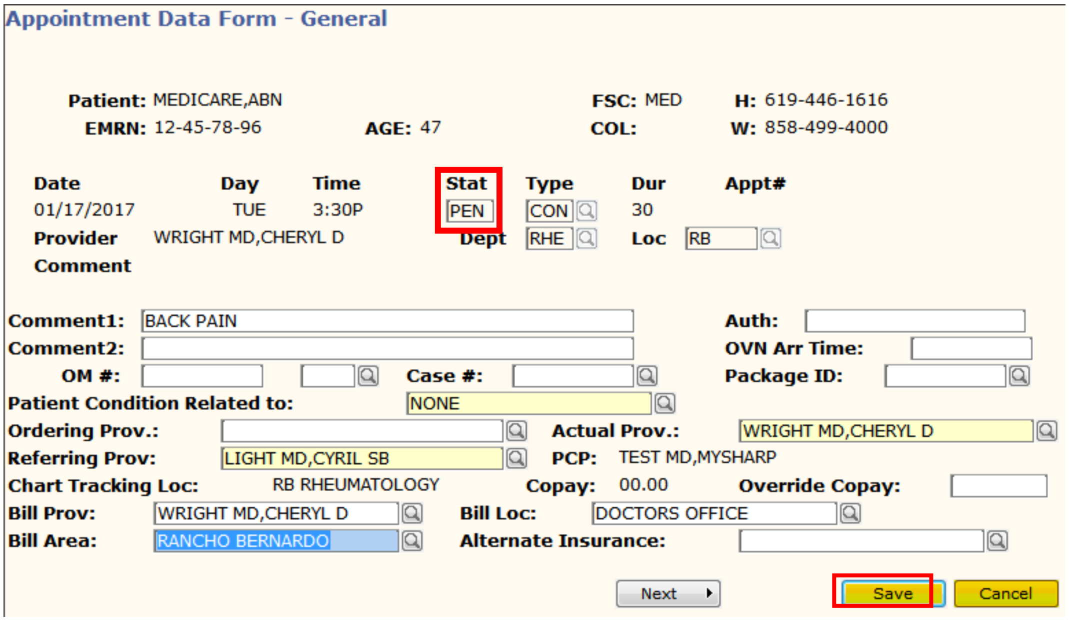
2. Select the arrived appointment for today or click on the time hyperlink



3. Click on **Appt Actions**

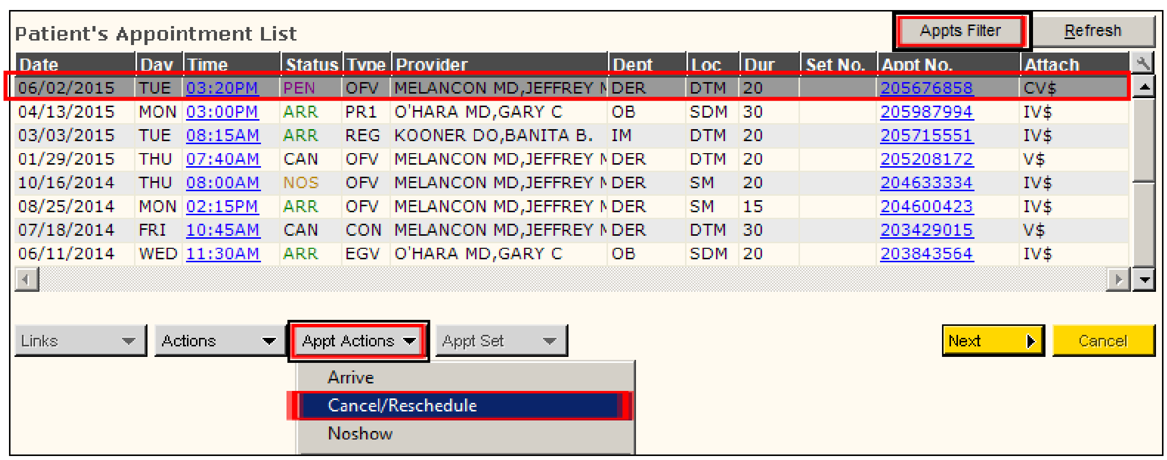
4. Select **Appointment Data Form** (ADF)

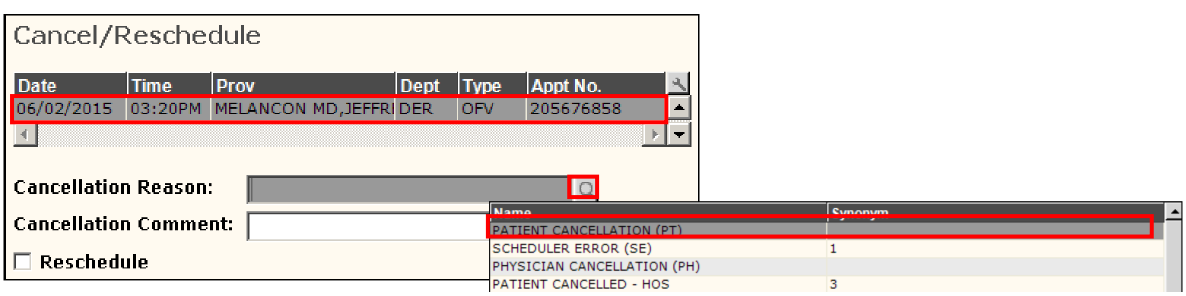
5. Change the appointment status from **ARR to PEN** like the screen below



6. Click **Save**

- *The patient's pending appointment can now be cancelled.*



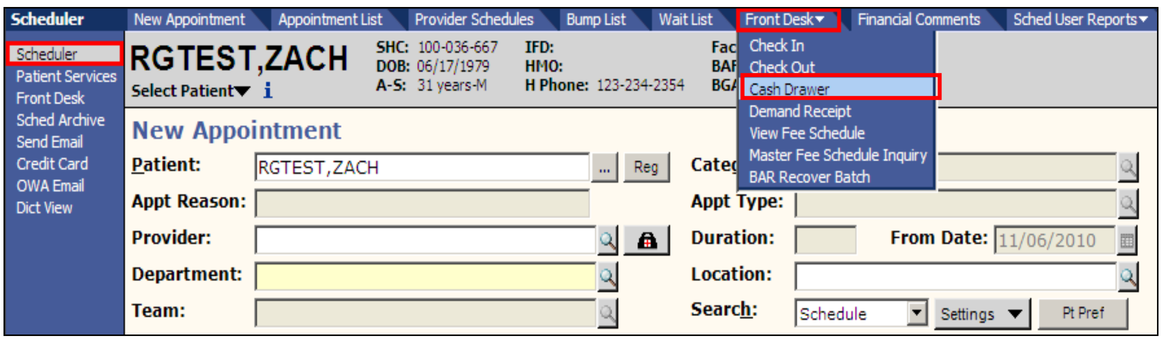


Deleting a Payment

Some patients leave before being seen by the provider. To delete a payment, follow these steps:

1. Ask the patient for their **receipt**
2. **Return payment** to the patient in the same form it was originally collected (cash, check or credit card)
3. Write or stamp **VOID** across both receipts
4. Have patient **sign receipt** acknowledging that they received their payment back
5. **Delete payment** from your cash drawer (batch)
6. **Document all reversals on your Batch Reconciliation Form** and circle all reversals on the **Batch Proof**

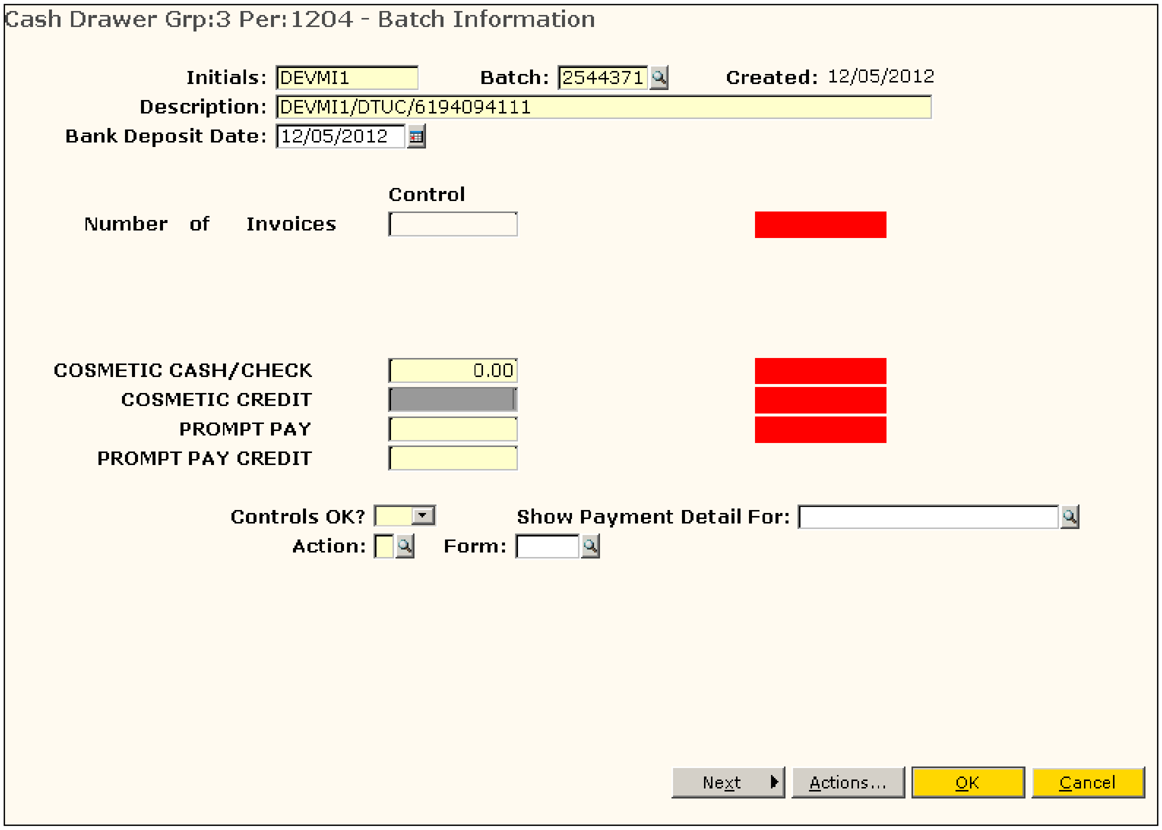
How to Delete a Payment:



1. Click **Front Desk**

2. Select **Cash Drawer**

Deleting a Payment



3. Tab until you get to Cosmetic Cash/Check

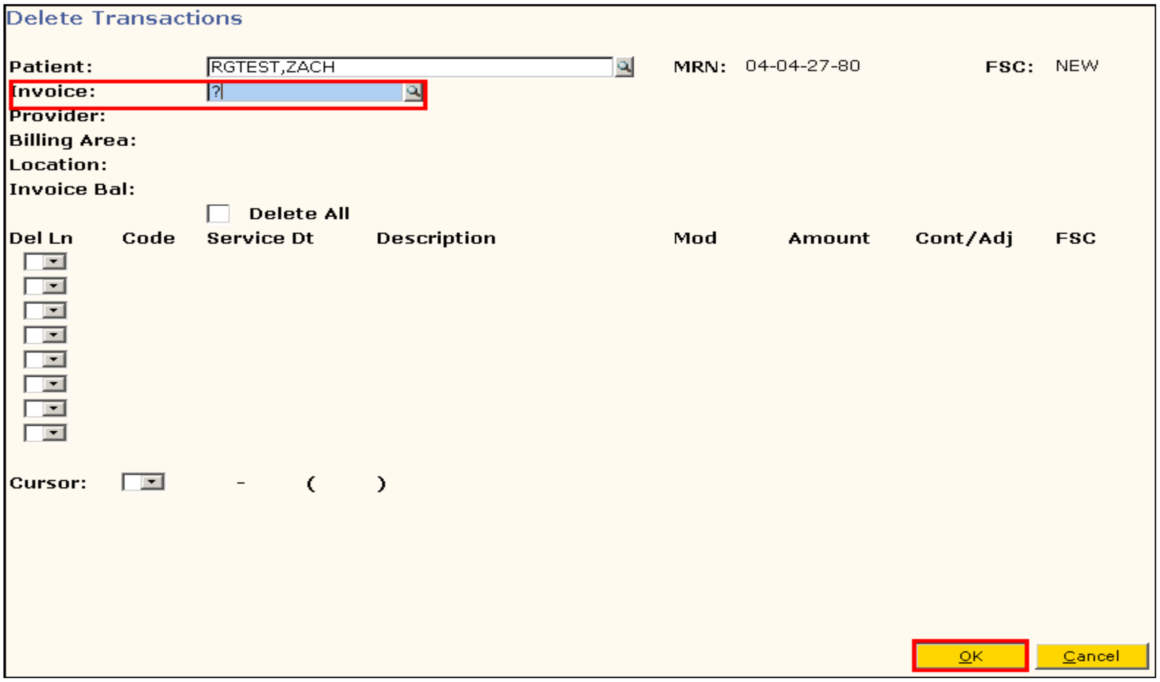
4. **Type zeros** in each of the **8 control fields** until you get to **Controls OK?**

5. **Type Y at Controls OK?**
    - You will need to Control your cash drawer only **ONCE** the first time you enter it.
    - Going forward, it will save your Control (Y)

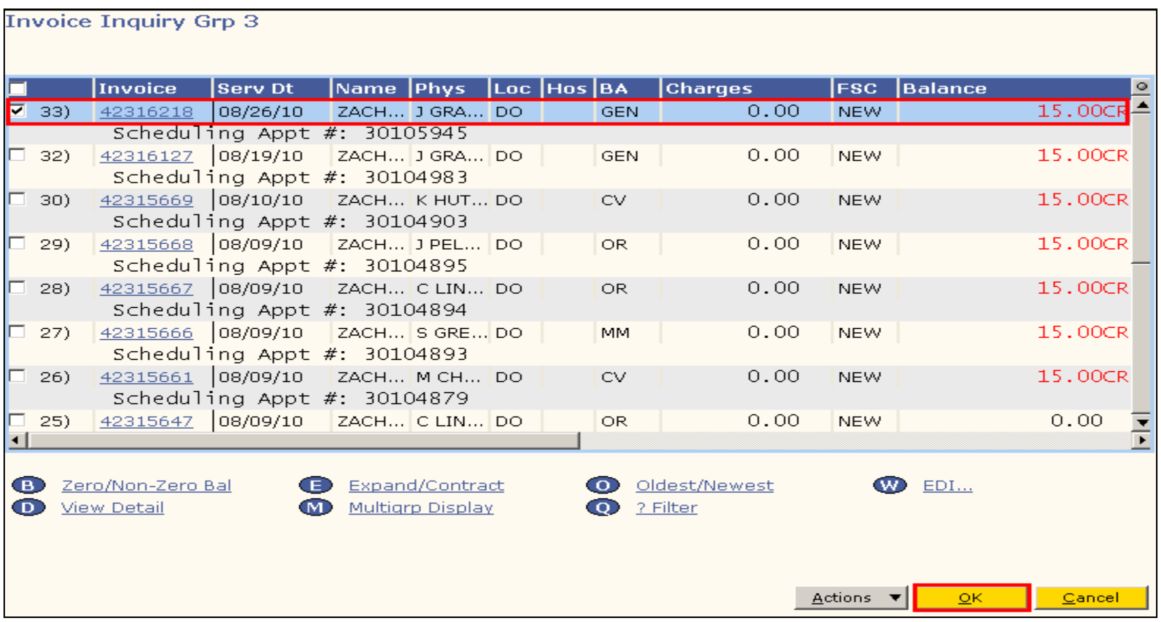
6. At the **Action Prompt: Type D**
    - *Or click on the magnifying glass and choose "Delete Transactions"*

7. Press **Tab**

8. Click **OK**

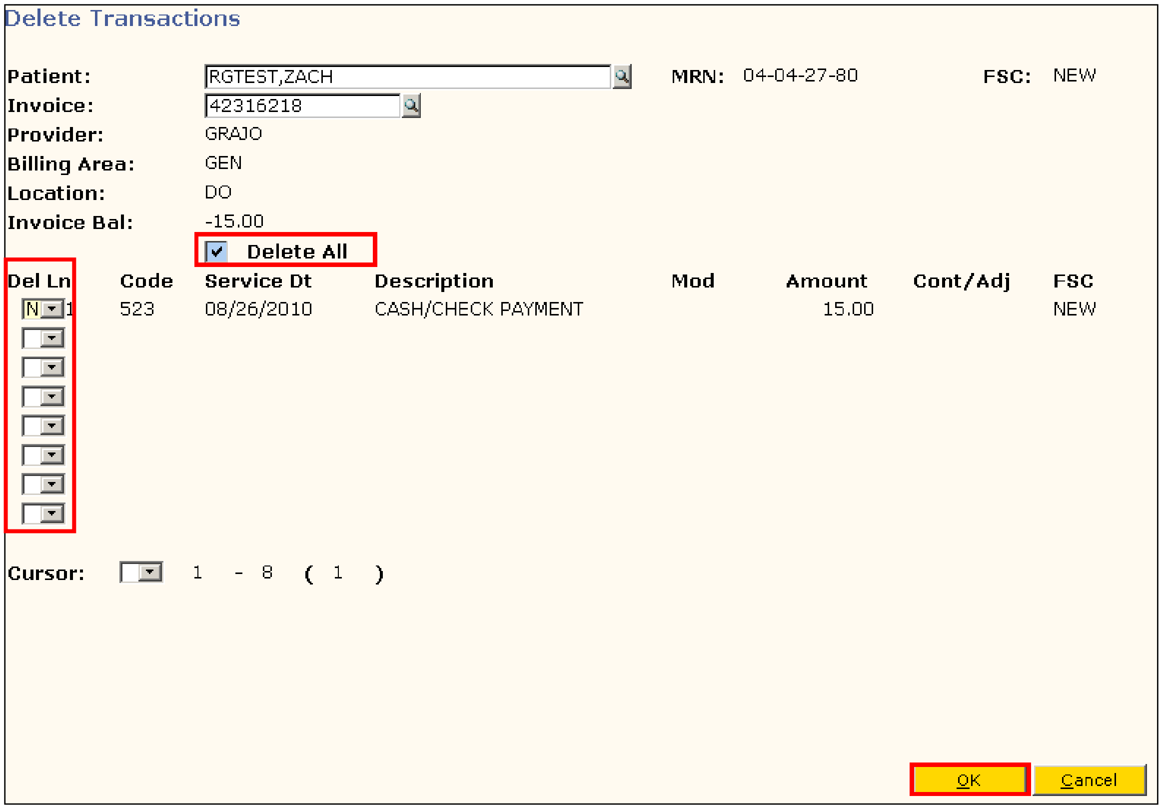


9. Type a **?** and Press **Tab** (*or click the Magnifying Glass at Invoice*)



10. **Check mark the box** of the invoice to delete

11. Click **OK**

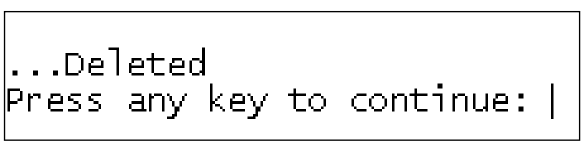


12. Check mark the **Delete All box**

   - If more than one invoice appears for the same Service Date, make sure you select the correct invoice to delete.

   - To delete the correct invoice, select “Y” from the drop down list under the **Del Ln** (Delete Line) column for the invoice you wish to delete.

13. Click **OK**



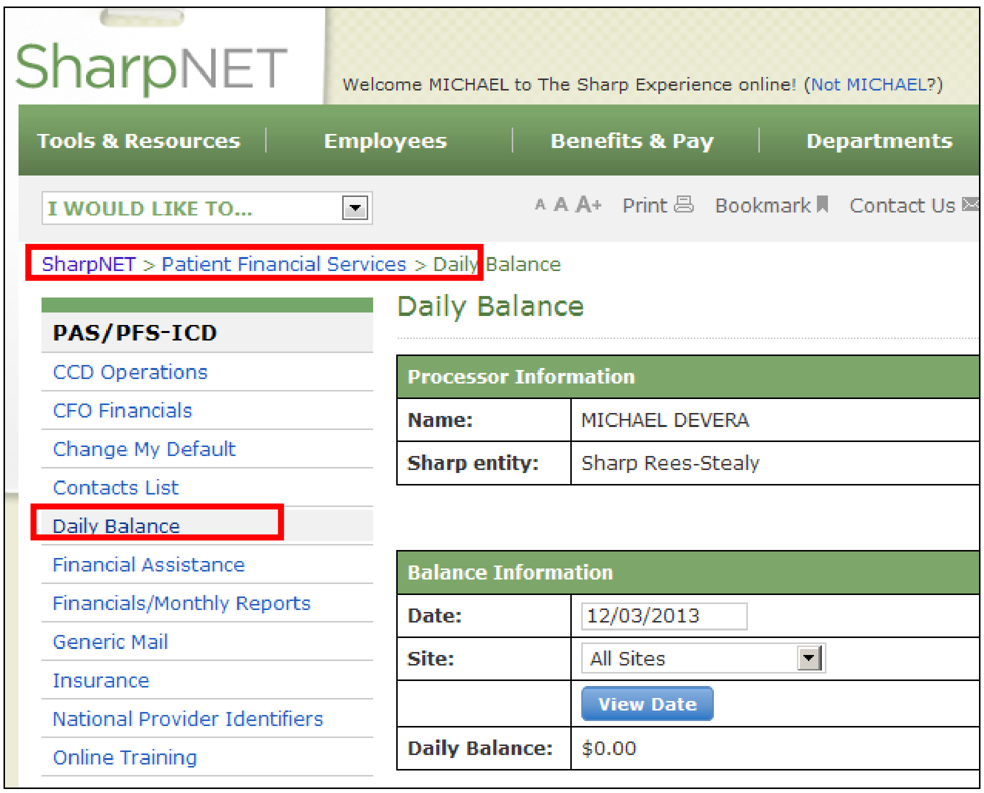
14. **Press Enter** to continue

Note: This is your confirmation that the payment was successfully deleted.

To check if the payment was deleted, refer to your cash drawer totals.

Closing the Batch

Your batch must be closed at the end of every shift. Before you close your batch, you must verify and balance your totals and document accordingly.



SHARP Rees-Stealy Medical Centers

BATCH RECONCILIATION FORM

NAME: ____________________ (Print) **USER NAME:** ____________ **DATE:** ______

Confirm Batch Site Location: ____________ **Confirm Credit Card Site Location:** ______

STARTING CHANGE BANK: $ ____________ **BATCH #** ____________

PAYMENT REVERSAL: Circle on Batch Report & Attach signed receipt

MRN:
AMOUNT: $ Type: C, CK, CC
WHY REVERSED:

MRN:
AMOUNT: $ Type: C, CK, CC
WHY REVERSED:

MRN:
AMOUNT: $ Type: C, CK, CC
WHY REVERSED:

MRN:
AMOUNT: $ Type: C, CK, CC
WHY REVERSED:

DOWNTIME MANUAL RECEIPTS USED:

BEGINNING RECEIPT #:

ENDING RECEIPT #:

AMOUNTS COLLECTED:
(Not Posted)

Cash	Check	CC

MANUAL RECEIPTS TOTAL: $

CASH RECONCILIATION:

$ 1.00 x		=	
$ 2.00 x		=	
$ 5.00 x		=	
$ 10.00 x		=	
$ 20.00 x		=	
$ 50.00 x		=	
$ 100.00 x		=	
.01 x		=	
.05 x		=	
.10 x		=	
.25 x		=	
.50 x		=	

COMMENTS:

____

Employee Signature (owner of cash bag)

Cash - Verifier Signature

Deposit Preparer - Verifier Signature (Support Services)

CASH COLLECTED: ________

CHECKS COLLECTED: ________

CHARGE CARDS: ________

COLLECTED AMOUNT TOTAL: ________

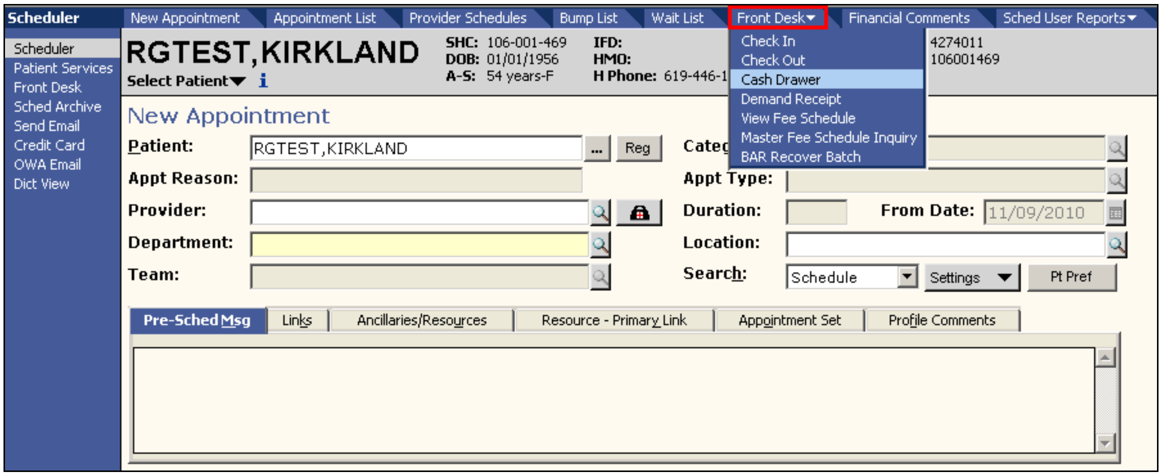
GE/IDX ACTUAL TOTAL: ________

OVER
(More $ than GE/IDX total) ________

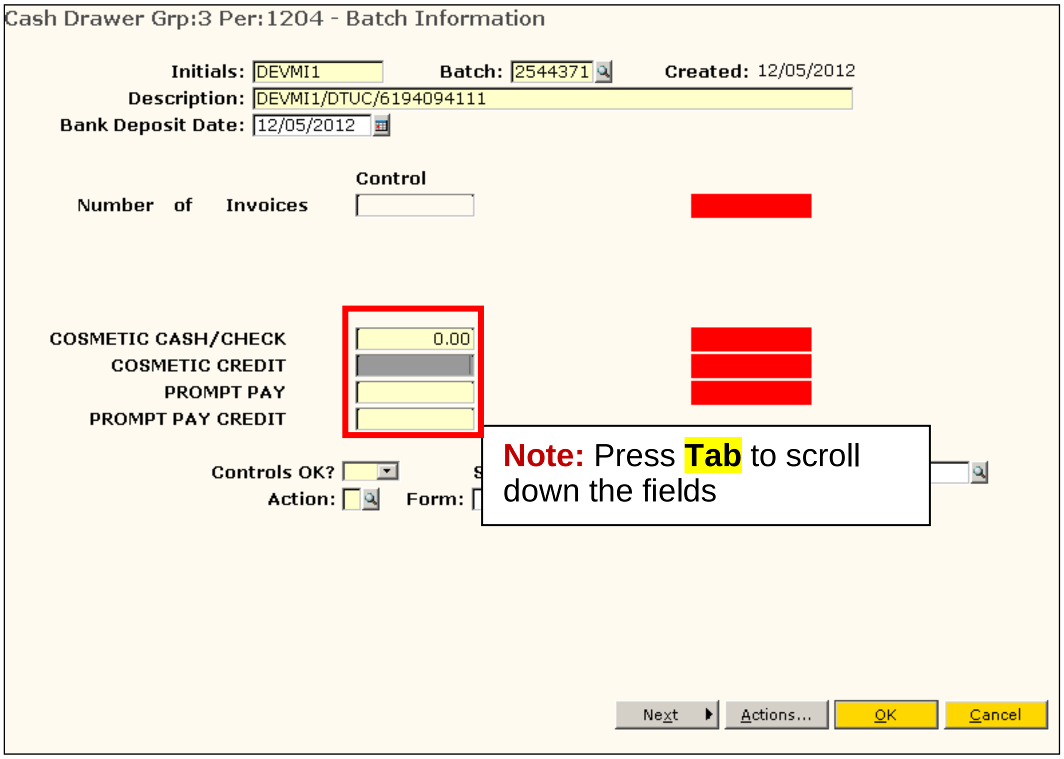
SHORT
(Less $ than GE/IDX total ________

Close batch at end of day. Revised Apr. 2015

How to Balance the Cash Drawer:

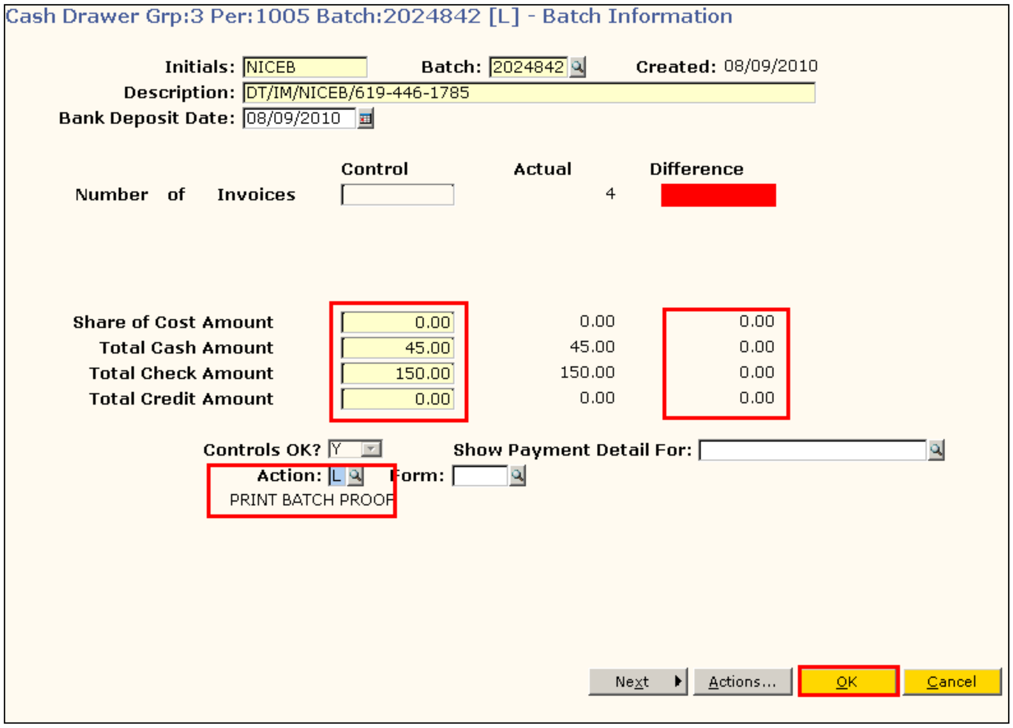


1. Click **Front Desk** (HTB)
2. Select **Cash Drawer**



3. Press **Tab** to the Cosmetic Cash/Check field

Closing the Batch



4. **Fill in the amounts you collected** under each of the fields as you **tab** down the list:

    - Total Cash Amount
    - Total Check Amount
    - Total Credit Amount

How to Print your Batch Proof:

1. **Type "L"** at Action and Press **Tab** to print the Batch Proof

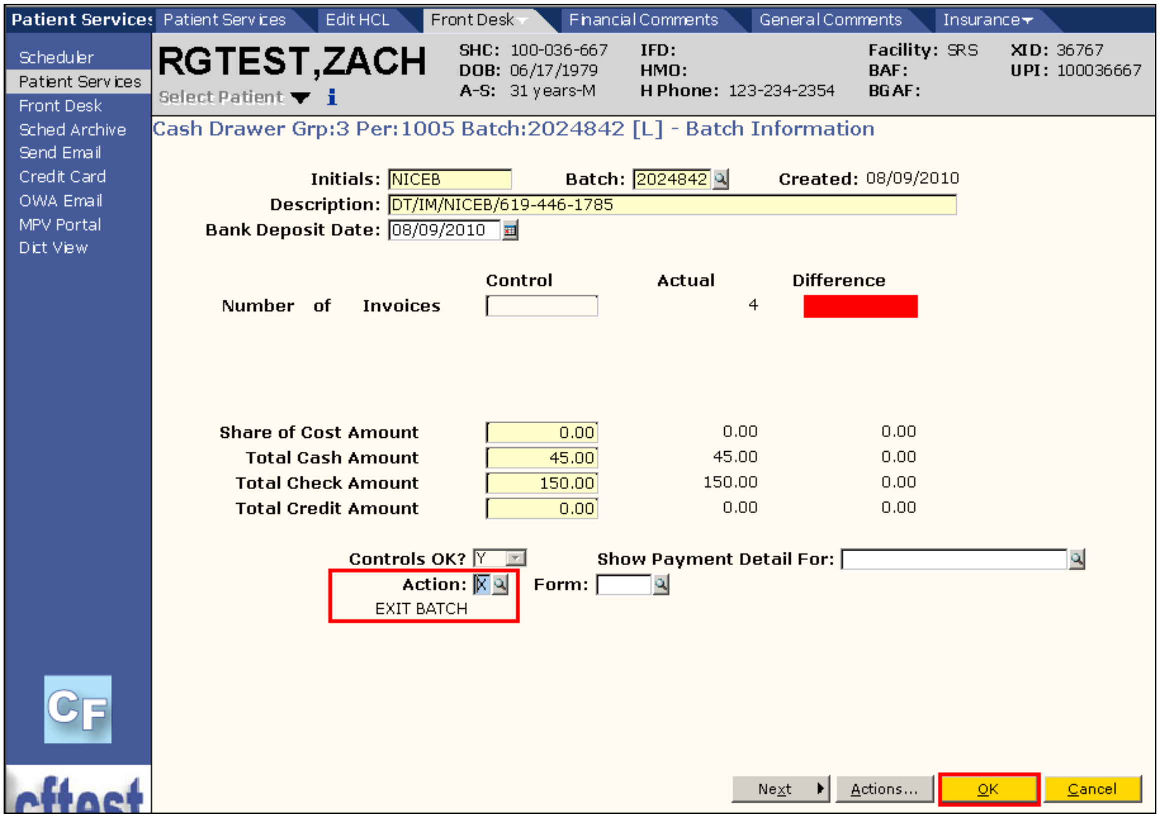
2. Click **OK**

Note: Circle any reversals (deleted payments) on your printed Batch Proof.

Deleted payments will be shown as: -40.00 (Del)

Closing the Batch

How to Exit your Batch:



1. Click **Front Desk**
2. Select **Cash Drawer**
3. Type **"X"** at Action
4. Press **Tab**
5. Click **OK** to exit batch

Note: If your batch is unbalanced, try to find your error. If unable to balance, immediately notify support services, site BSR or supervisor before you exit your batch.

Prompt Pay Discount Overview

- A patient who pays in full at time of service qualifies for Prompt Pay (this does not apply to co-pays, co-insurance, and/or deductible amounts).
- When you check the patient in, please go over that if they leave without paying in full they will **<u>not</u>** receive the discounted rate and will be billed in full.
- Remind patient that any ancillary services (Lab/Rad) will be billed at the discounted rate and they will need to submit their payment upon receipt of statement.
- The following are already set up at the discounted rate and do **<u>not</u>** qualify for the Prompt Pay Discount:
    - Self-pay OB
    - Urgent Care

<u>INSTRUCTIONS</u>

1. Review your provider schedules prior to the start of your day.
2. Identify patients that are "Prompt Pay" eligible.
   ***If unsure, confirm with Business Services to clarify if patient is eligible.**
3. Offer the Prompt Pay Discount to the patient **<u>before</u>** arriving the appointment.
4. If the patient agrees, give them the Prompt Pay Discount Form.
5. Explain to the patient it's their responsibility to hand the form to the provider, and take the completed form to Business Services after their appt to check out.
6. The patient will pay the difference, excluding any ancillary services which will be billed after those services have been performed.

<u>***Before*** you check-in the appointment:</u>

1. Open the patients ADF (appointment data form)
2. In the Override FSC: field, type in PROP
3. Continue with check-in process
4. Collect the self-pay deposit. **Explain this amount is <u>only a deposit!!</u>**

<u>Deposit Amounts:</u>

New Patient: $200
New Patient, Out of State: $250
New Patient, Out of Country: $350; **balance paid at end of visit**
Established Patient: $130

SHARP Rees-Stealy Medical Centers

Prompt Pay Discount

Patient Label	
Patient Name:	DOB: __/__/___
EMRN#:	DOS:
Provider Name	

Patient: *Please provide form to your nurse/physician.* ***After your physician has completed the form, please visit the Patient Service or Business Service representative's desk for payment.*** *If payment for today's estimated service is not collected today, services may be billed at the non-discounted rate.*

Physician to Complete column:
Please ***document the services performed & ordered today*** *on this form.* ***Patient*** *will visit Business Services for payment collection today.*

PHYSICIAN COMPLETE	***BUSINESS/PSR REP to COMPLETE***
CPT code (s)	Fee Schedule 59 Look Up
________________________	________________________
________________________	________________________
________________________	________________________
Injection CPT code(s) **and** #units	Per Unit Price/Total Price per injection
J________________#units_______	________________________
Total:	**$**____________________

I understand that the amount collected today is an **estimate of today's visit**. The cost associated with this visit may include additional charges (for example, unanticipated service codes, laboratory and/or other ancillary services). I agree to pay for the additional services upon receipt of statement. I understand that I am opting out of using my insurance benefits so that I can be considered self-pay for this service.

______________________________ ______________________________

Signature of patient SRS Employee/Witness

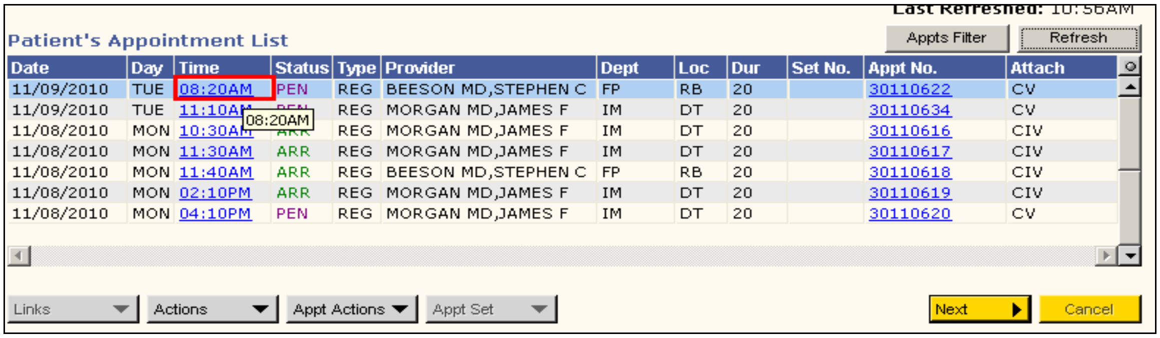
____

Date

Original to HIM for scanning into Touchworks
Copy to patient

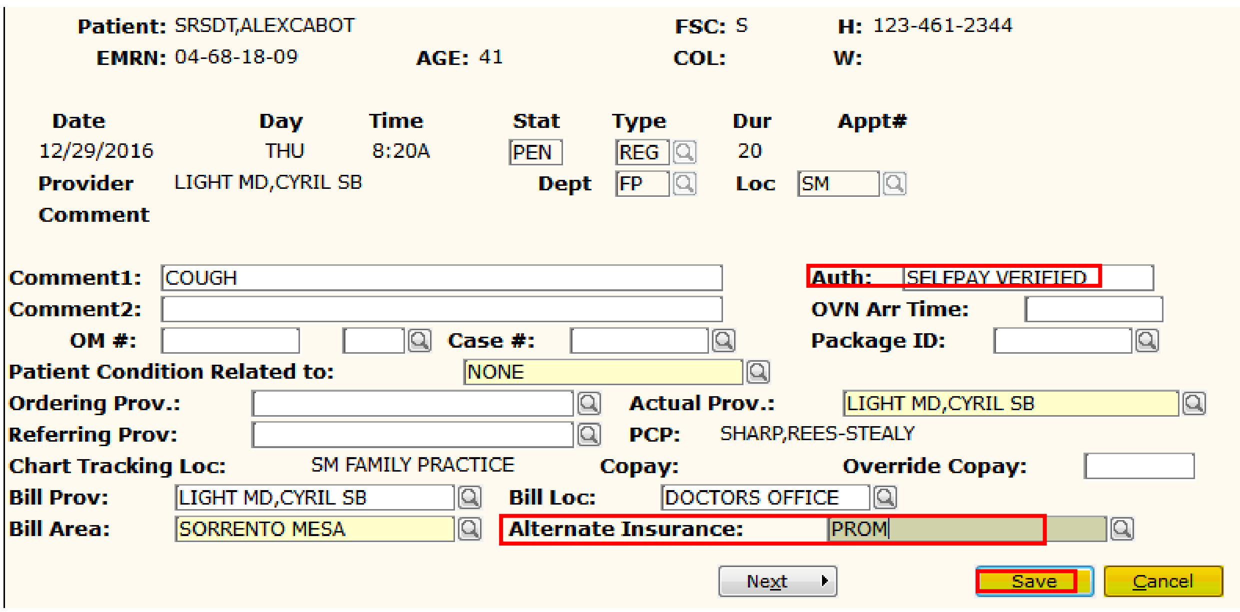
Rev Mgmt. Revised 1/15/2013

Prompt Pay Discount - Check In:



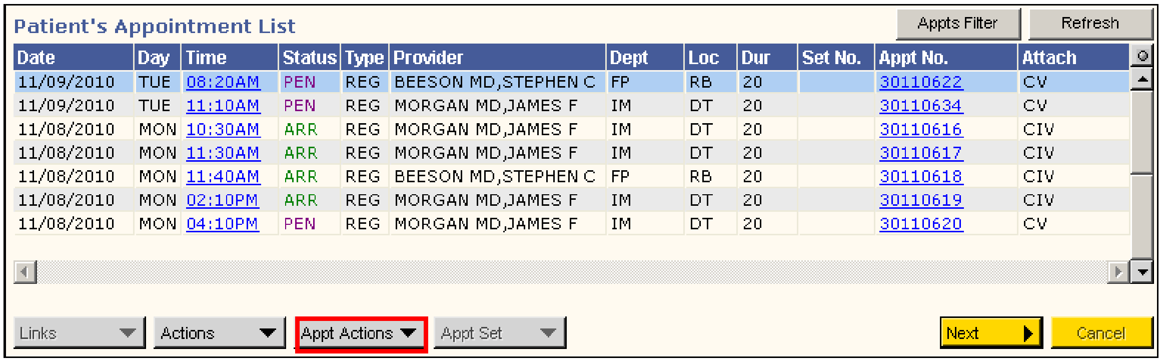
Date	Day	Time	Status	Type	Provider	Dept	Loc	Dur	Set No.	Appt No.	Attach
11/09/2010	TUE	08:20AM	PEN	REG	BEESON MD,STEPHEN C	FP	RB	20		30110622	CV
11/09/2010	TUE	11:10AM	PEN	REG	MORGAN MD,JAMES F	IM	DT	20		30110634	CV
11/08/2010	MON	10:30AM	ARR	REG	MORGAN MD,JAMES F	IM	DT	20		30110616	CIV
11/08/2010	MON	11:30AM	ARR	REG	MORGAN MD,JAMES F	IM	DT	20		30110617	CIV
11/08/2010	MON	11:40AM	ARR	REG	BEESON MD,STEPHEN C	FP	RB	20		30110618	CIV
11/08/2010	MON	02:10PM	ARR	REG	MORGAN MD,JAMES F	IM	DT	20		30110619	CIV
11/08/2010	MON	04:10PM	PEN	REG	MORGAN MD,JAMES F	IM	DT	20		30110620	CV

- Use the Appts Filter button to find the correct appointment
- Highlight the patient's appointment from the appointment list and click on the appointment time hyperlink

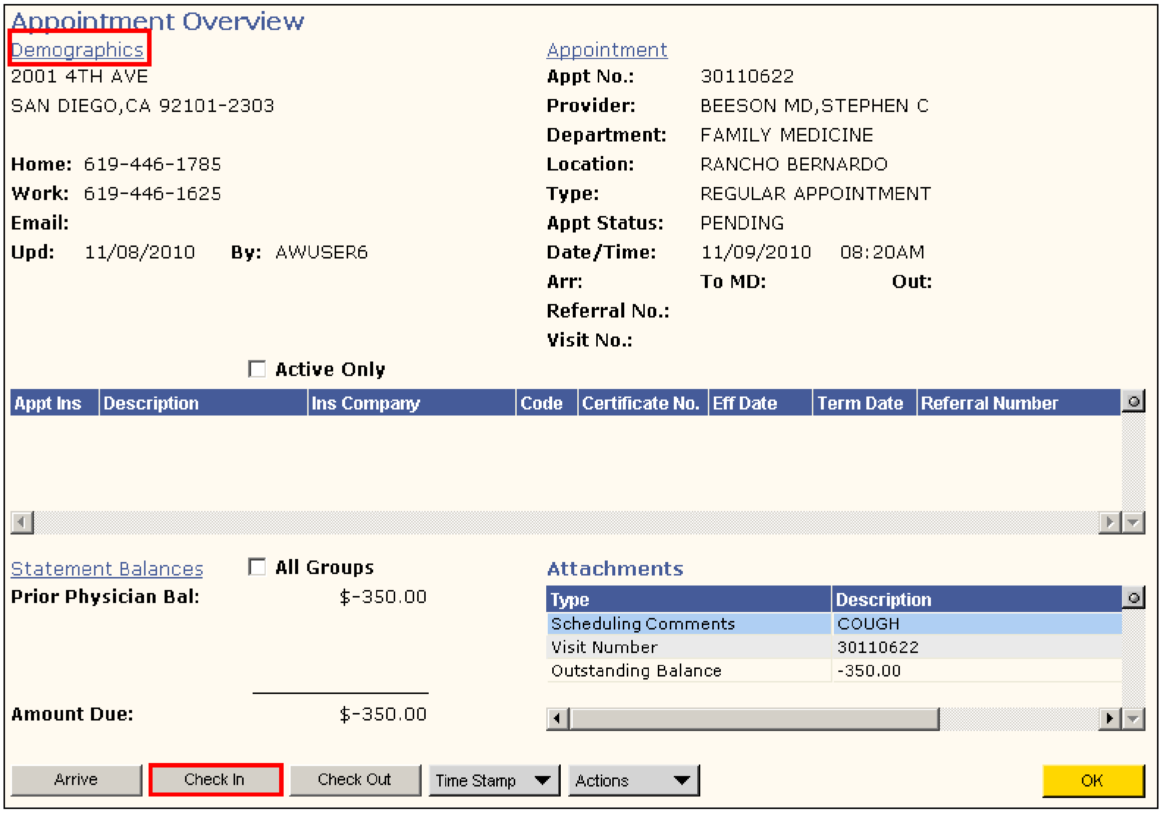


- Edit the Alternate Insurance by typing PROM or click the magnifying glass
- Click Save

Prompt Pay Discount Overview

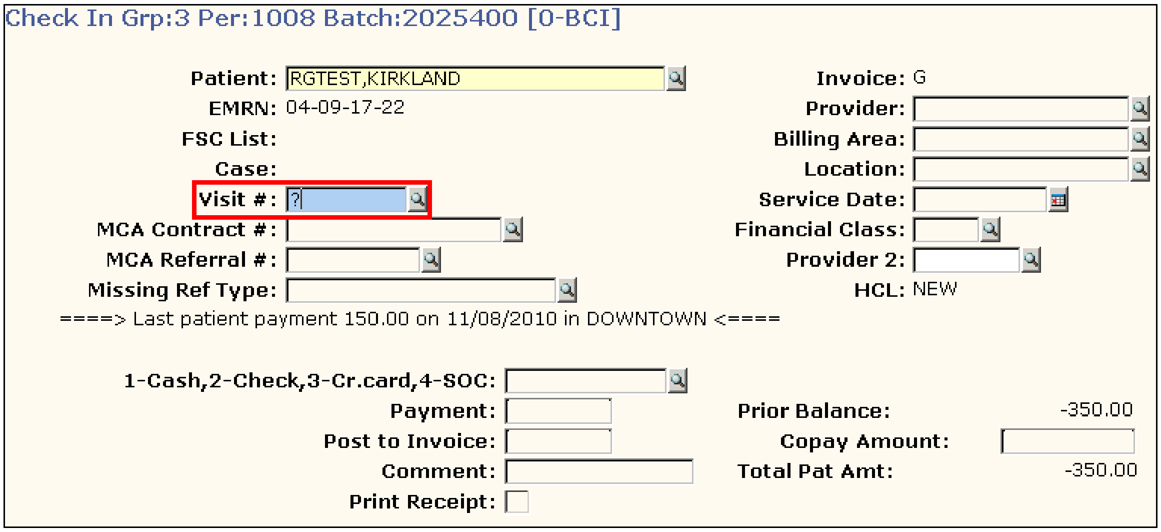


- Click Appt Actions
- Select Appointment Overview

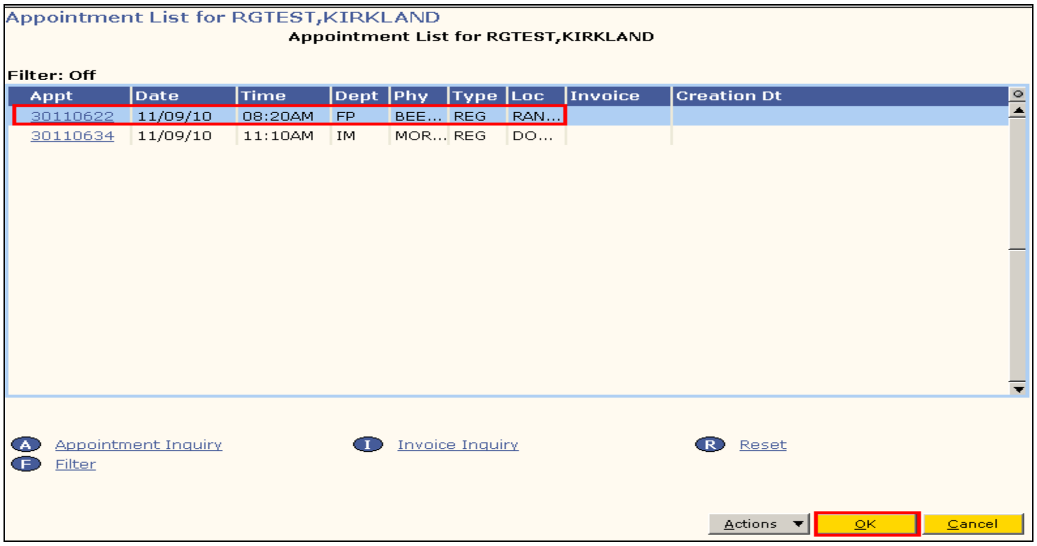


- Click Demographics
- Verify all registration screen pages & ensure information is accurate
- Verify any outstanding balances
- Click Check In

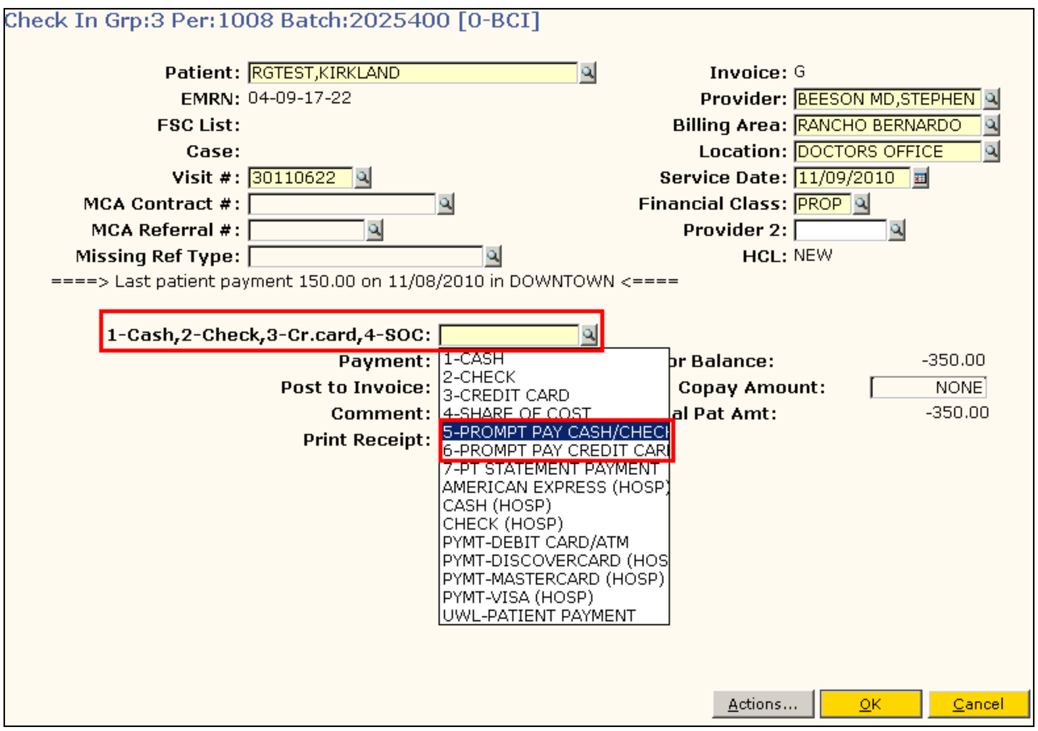
- Click OK at the Cash Drawer



- At the Visit # field, Type a ? and Press Tab or Click on the Magnifying Glass

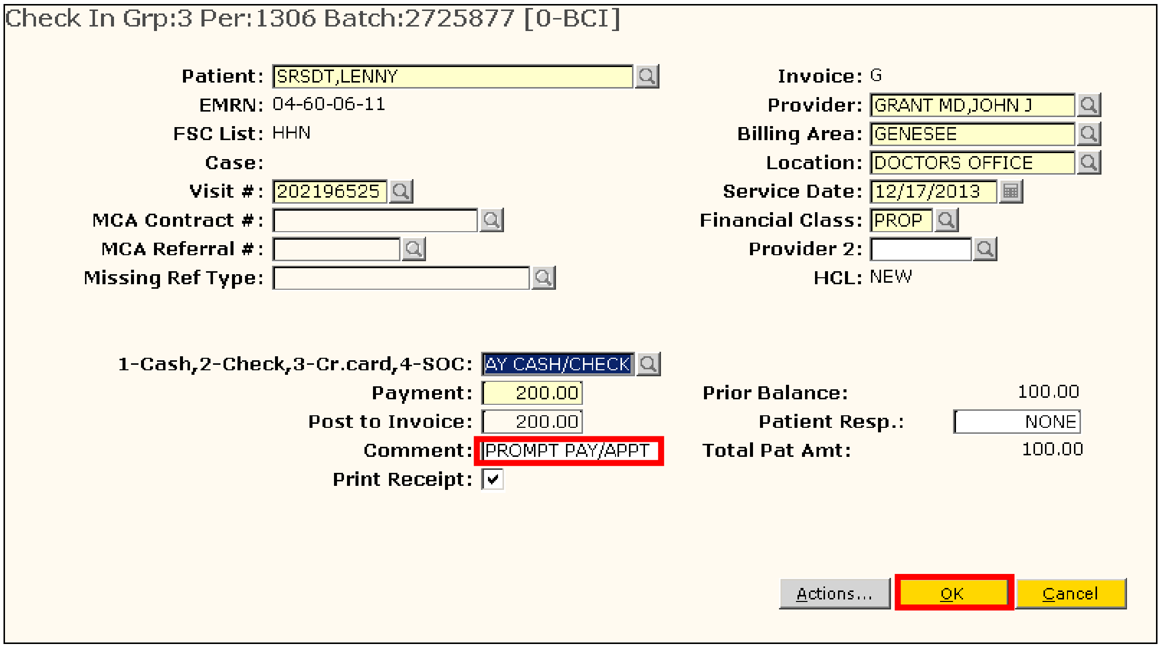


- Click on the Date of the appropriate visit (do not click the hyperlink)
- Click OK



- Click the magnifying glass and select the appropriate prompt pay **payment option:**

5-Prompt Pay Cash/Check
6-Prompt Pay Credit Card



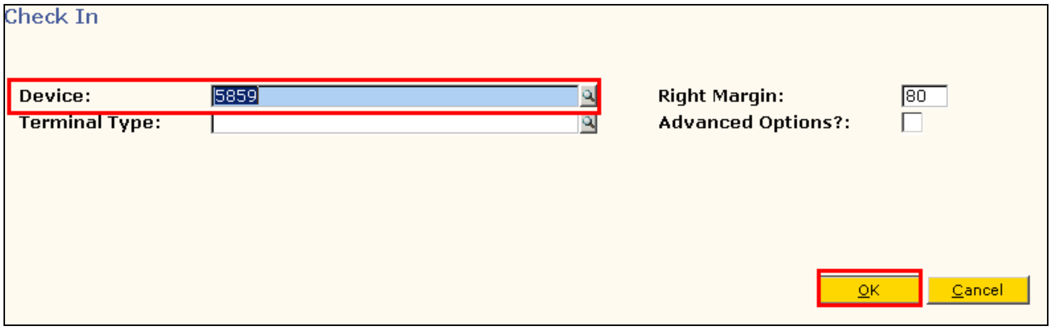
- Tab to Payment and collect the correct deposit amount (advise the patient if the balance afterwards is less than the deposit, the amount can be refunded)

- Tab to Comment and type the receipt comments

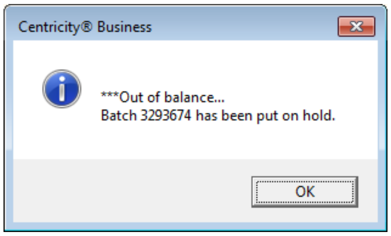
> Comment: Prompt Pay Deposit Only /Appt/Cash
> Comment: Prompt Pay Deposit Only /Appt/Ck#
> Comment: Prompt Pay Deposit Only /Appt/CC Conf #

- Tab to Print Receipt
- Click **OK**

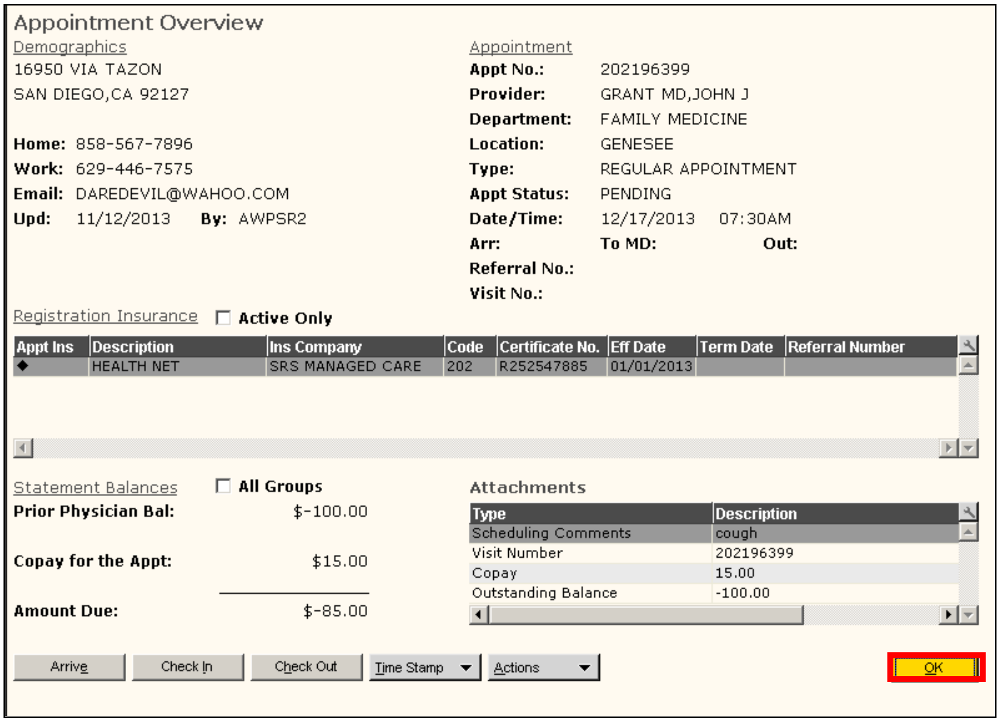
- Confirm the Printer Device number
- Click OK



- Click **OK** at the ***Out of Balance…



- Click **OK** at the Appointment Overview screen



SHARP Rees-Stealy Medical Centers

Prompt Pay Discount

Patient Label	
Patient Name:	DOB: __/__/___
EMRN#:	DOS:
Provider Name	

Patient: *Please provide form to your nurse/physician.* ***After your physician has completed the form, please visit the Patient Service or Business Service representative's desk for payment.*** *If payment for today's estimated service is not collected today, services may be billed at the non-discounted rate.*

Physician to Complete column:
Please ***document the services performed & ordered today*** *on this form.* ***Patient*** *will visit Business Services for payment collection today.*

PHYSICIAN COMPLETE	***BUSINESS/PSR REP to COMPLETE***
CPT code (s)	Fee Schedule 59 Look Up
____________________	____________________
____________________	____________________
____________________	____________________
Injection CPT code(s) **and** #units	Per Unit Price/Total Price per injection
J________________#units______	____________________
Total:	**$**________________

I understand that the amount collected today is an **estimate of today's visit**. The cost associated with this visit may include additional charges (for example, unanticipated service codes, laboratory and/or other ancillary services). I agree to pay for the additional services upon receipt of statement. I understand that I am opting out of using my insurance benefits so that I can be considered self-pay for this service.

______________________________ ______________________________
Signature of patient SRS Employee/Witness

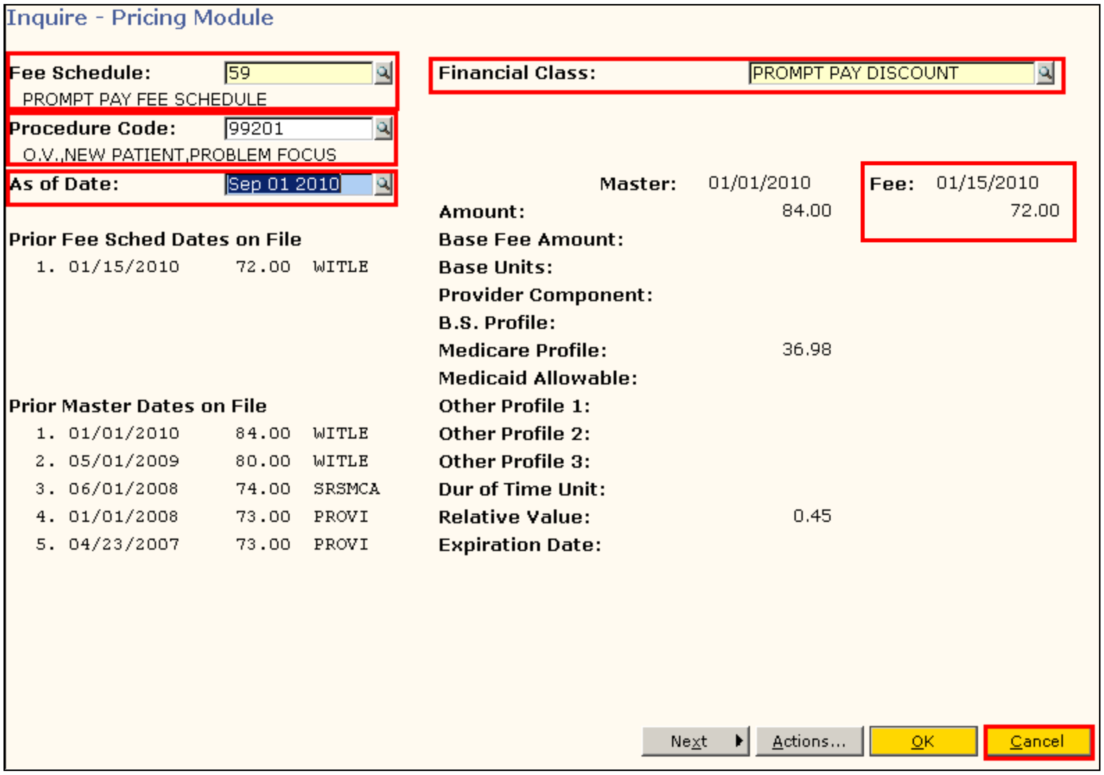
____
Date

Original to HIM for scanning into Touchworks
Copy to patient

Rev Mgmt. Revised 1/15/2013

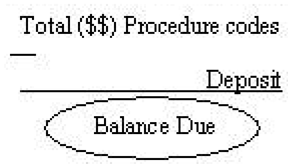
Prompt Pay Discount - Check out:

1) Collect the “Prompt Pay Discount Form” (PPDF)
2) Pull up patient using PatientSecure
3) From Scheduler click on **Front Desk**
4) Select **View Fee Schedule**
5) At **Fee Schedule:** enter numeric code “59” for Clinic and press Tab
6) At **Financial Class:** enter “PROP” and press Tab
7) At **Procedure Code:** enter the procedure code provided by the physician found on the PPDF and press Tab
8) At **As of Date:** enter “T” for today’s date and press Tab
9) The Prompt Pay Discount **Amount:** is located on the far right



10) Write this dollar amount on the PPDF, next to the procedure code, and repeat steps 7-9 for additional procedure codes listed on PPDF

11) Add all procedure code amounts, write the total on the PPDF, and then subtract the deposit amount on the receipt.



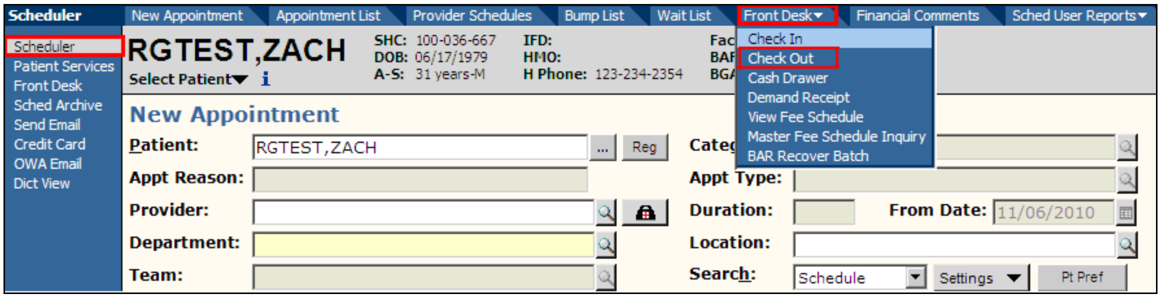
12) Collect the remaining balance that is due

13) Make a copy of the PPDF for the patient, and the provider, and send the original form to Health Information Management (H.I.M.)

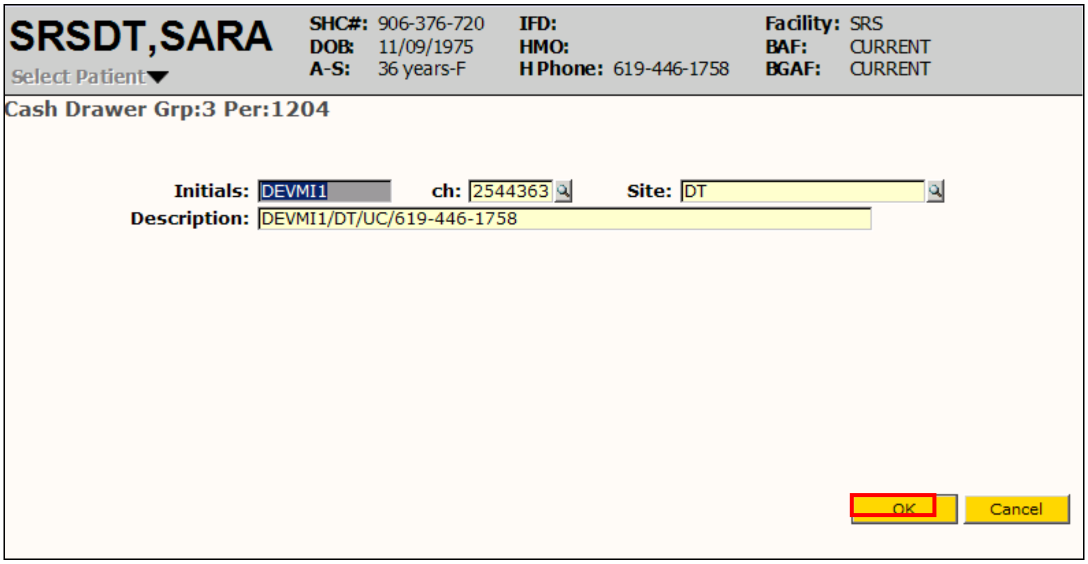
14) Enter Visit Notes:

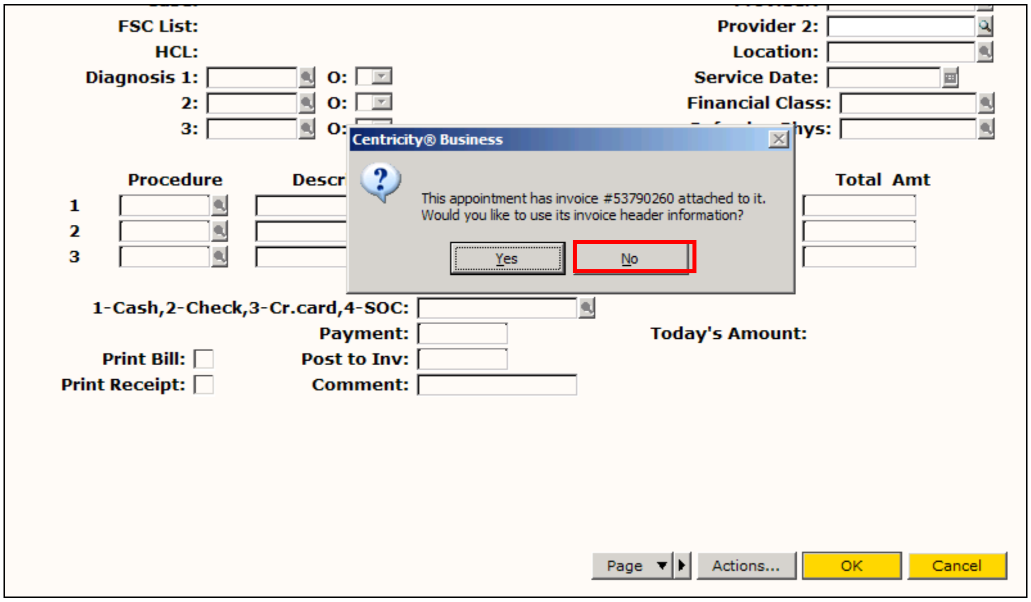
Example: DATE OF SERVICE/PROVIDER NAME/PROC CODES/ COL $$/ PPDF SENT TO HIM TO SCAN/CPY TO PT AND PROVIDER…

Prompt Pay Discount Overview

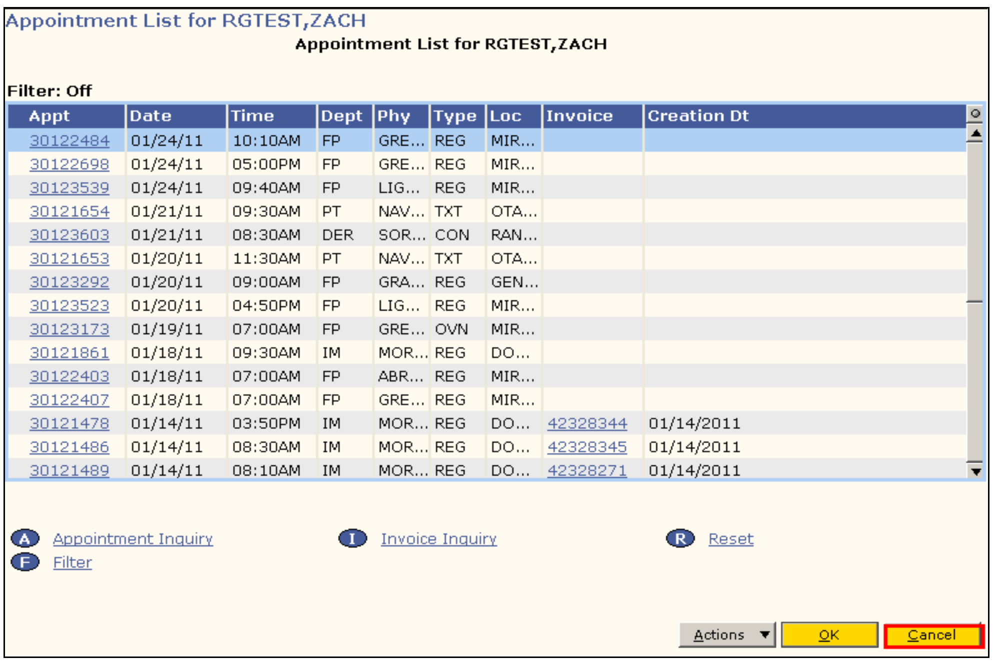


- From Scheduler pull up patient using PatientSecure
- Click on Front Desk (HTB)
- Click on Check Out
- Click OK





28. TAB to the invoice field
29. If "The appointment has invoice # ________ attached to it…" appears, click **No**


Appointment List for RGTEST,ZACH

Appointment List for RGTEST,ZACH

Filter: Off

Appt	Date	Time	Dept	Phy	Type	Loc	Invoice	Creation Dt
30122484	01/24/11	10:10AM	FP	GRE...	REG	MIR...		
30122698	01/24/11	05:00PM	FP	GRE...	REG	MIR...		
30123539	01/24/11	09:40AM	FP	LIG...	REG	MIR...		
30121654	01/21/11	09:30AM	PT	NAV...	TXT	OTA...		
30123603	01/21/11	08:30AM	DER	SOR...	CON	RAN...		
30121653	01/20/11	11:30AM	PT	NAV...	TXT	OTA...		
30123292	01/20/11	09:00AM	FP	GRA...	REG	GEN...		
30123523	01/20/11	04:50PM	FP	LIG...	REG	MIR...		
30123173	01/19/11	07:00AM	FP	GRE...	OVN	MIR...		
30121861	01/18/11	09:30AM	IM	MOR...	REG	DO...		
30122403	01/18/11	07:00AM	FP	ABR...	REG	MIR...		
30122407	01/18/11	07:00AM	FP	GRE...	REG	MIR...		
30121478	01/14/11	03:50PM	IM	MOR...	REG	DO...	42328344	01/14/2011
30121486	01/14/11	08:30AM	IM	MOR...	REG	DO...	42328345	01/14/2011
30121489	01/14/11	08:10AM	IM	MOR...	REG	DO...	42328271	01/14/2011

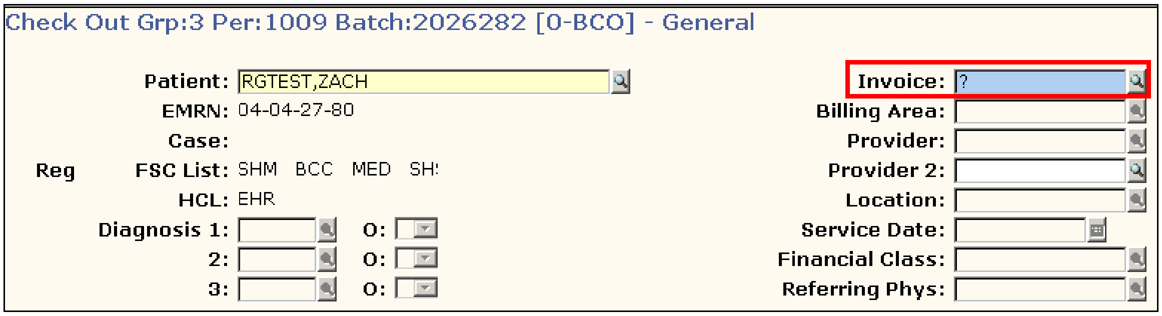
A Appointment Inquiry I Invoice Inquiry R Reset
F Filter

Actions OK Cancel

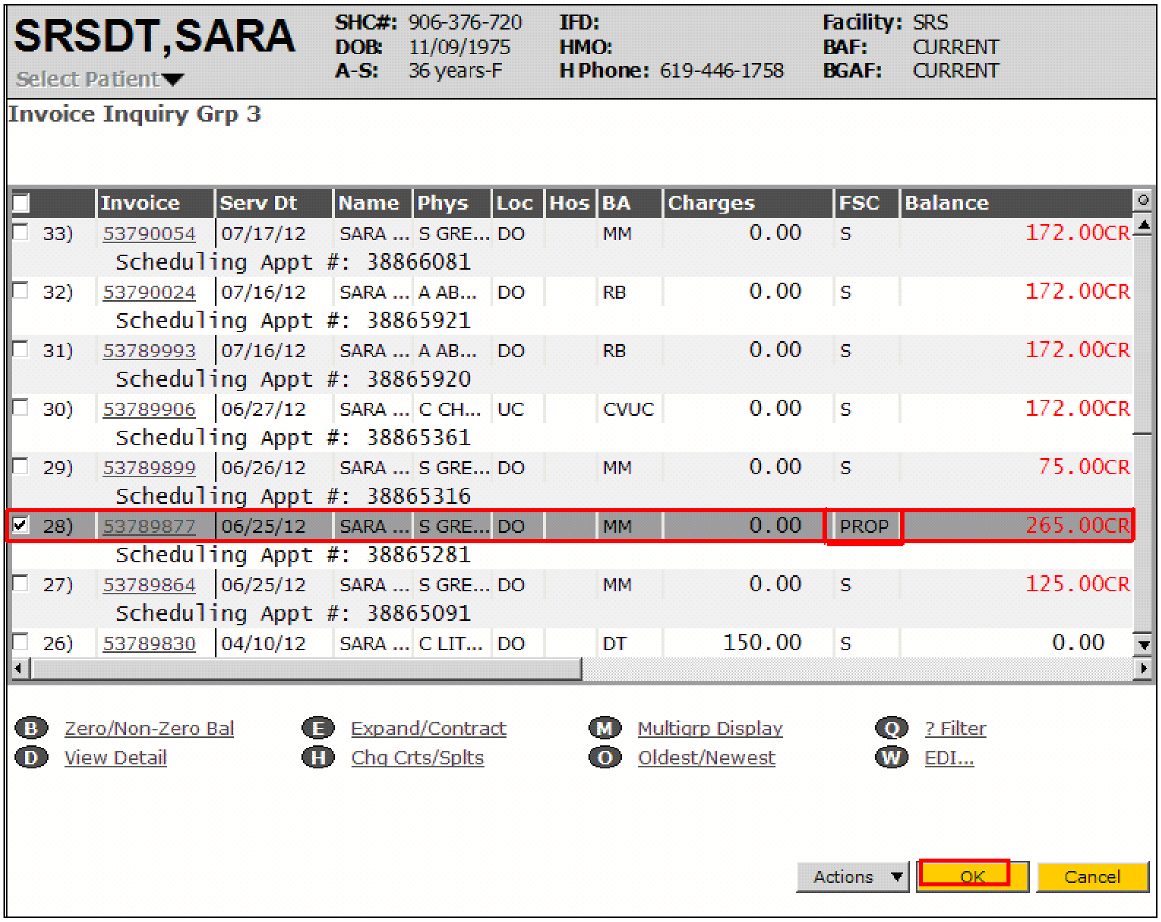
30. If the appointment list screen appears, click **Cancel**

31. Remove the G

32. Type a **?** and Press Tab or click on the Magnifying Glass



33. Check mark the box next to the correct invoice
34. Click OK

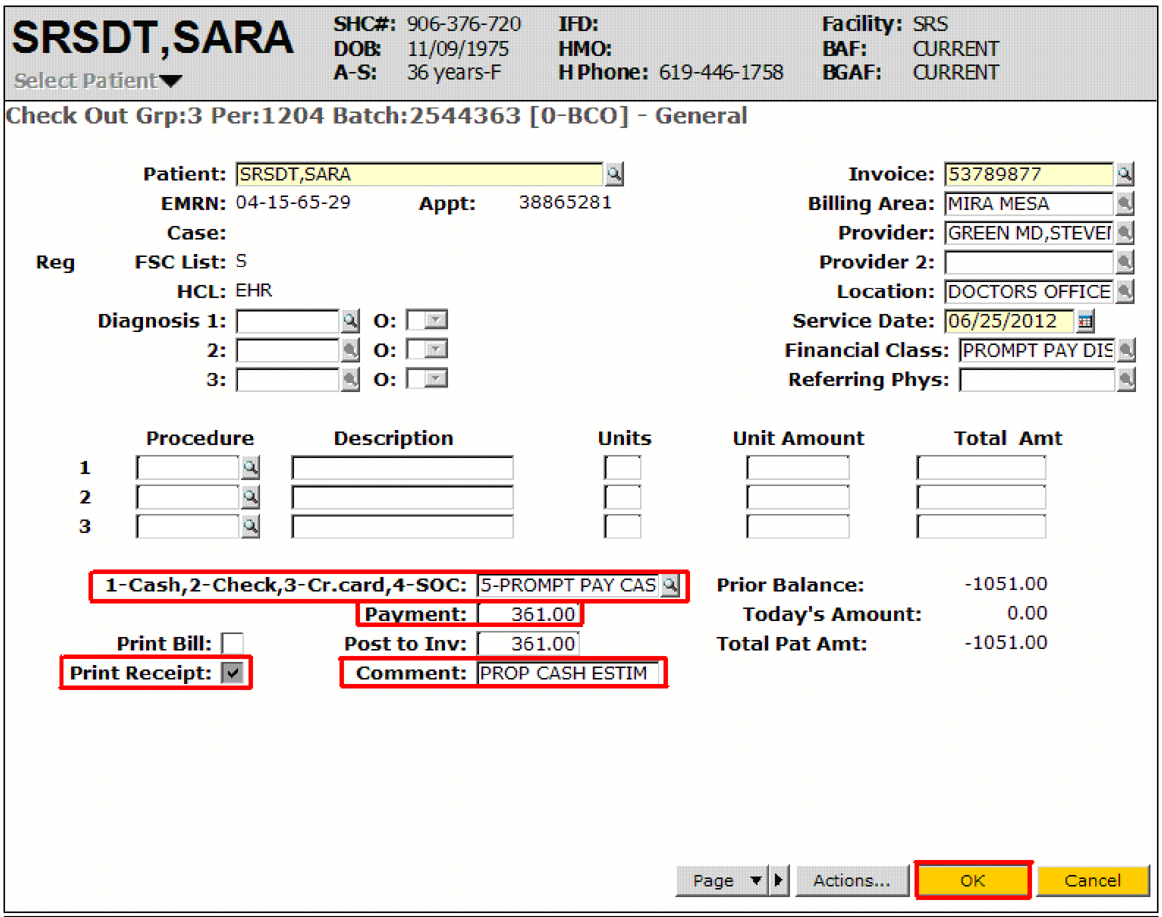


35. Click the magnifying glass and select the appropriate prompt pay payment option:

- 5-Prompt Pay Cash/Check
  or
- 6-Prompt Pay Credit Card

36. Type the payment amount
37. Type the appropriate receipt comments.
  - Comment: Prompt Pay Estimate/Appt/Cash
  - Comment: Prompt Pay Estimate/Appt/Ck#
  - Comment: Prompt Pay Estimate/Appt/CC Conf #

38. Check mark the **Print Receipt** box
39. Click OK



Prompt Pay Discount Q & A

1) What if the patient leaves without paying in full?
Before charges and/or orders are entered: Remove "Prompt" in the Alternative Insurance, and enter Visit Notes.

After charges and/or orders are entered: Leave account as is. Enter Visit Notes.

2) What if I forgot to change the "Alternative Insurance" before I arrived the appt?
Before charges and/or orders are entered: Update the Alternative Insurance in the VDF to "Prompt".

After charges and/or orders are entered: Please advise BSR, and/or support services staff and document visit notes. TES will need to be monitored and the FSC will need to be changed at that time.

3) What if I know (in advance) the codes for the ancillary services?
Collect the estimated amount (using pay code 585/586) from the Alternate Fee Schedule, explain this is only an estimate, and enter visit notes.

4) What if the patient's deposit is higher than the cost of the visit?
A refund of the difference can be issued to the patient only from the batch from which the deposit was taken. Another option is to leave the credit on the patient's account, which can be applied to additional charges (lab/x-ray) or future office visits.

5) What if the patient has a credit in the system, should I still take a deposit?
It depends. Verify with BSR if this is a true patient credit! If unsure, collect the full deposit amount. If it's a true credit owed to the patient, subtract the credit from the deposit amount, collect the remaining amount due, contact the BSR to reconcile the account, and enter visit notes.

6) What if the patient receives a statement for services that were not given the discount?
Send a Complex Charge Correction to "TRAINER SUPPORT" for those invoices needing a discount applied. Make sure to include the complete invoice # and DOS. Enter visit notes.

7) What if the pt has insurance but is receiving a non-covered service, can the Prompt Pay Discount apply to that service?
Yes (except for cosmetic services). If the patient has insurance and discloses the service they are about to receive is considered a "non-covered benefit" by their insurance, that visit is eligible for the discount.

8) What if the procedure code is not found in the Alternate Fee Schedule?
Send an e-mail to "PFS SUPPORT" indicating the procedure code was not found in the fee schedule. If urgent, call any of the Revenue Management trainers, or Rawan Battikha at 858-499-5545.

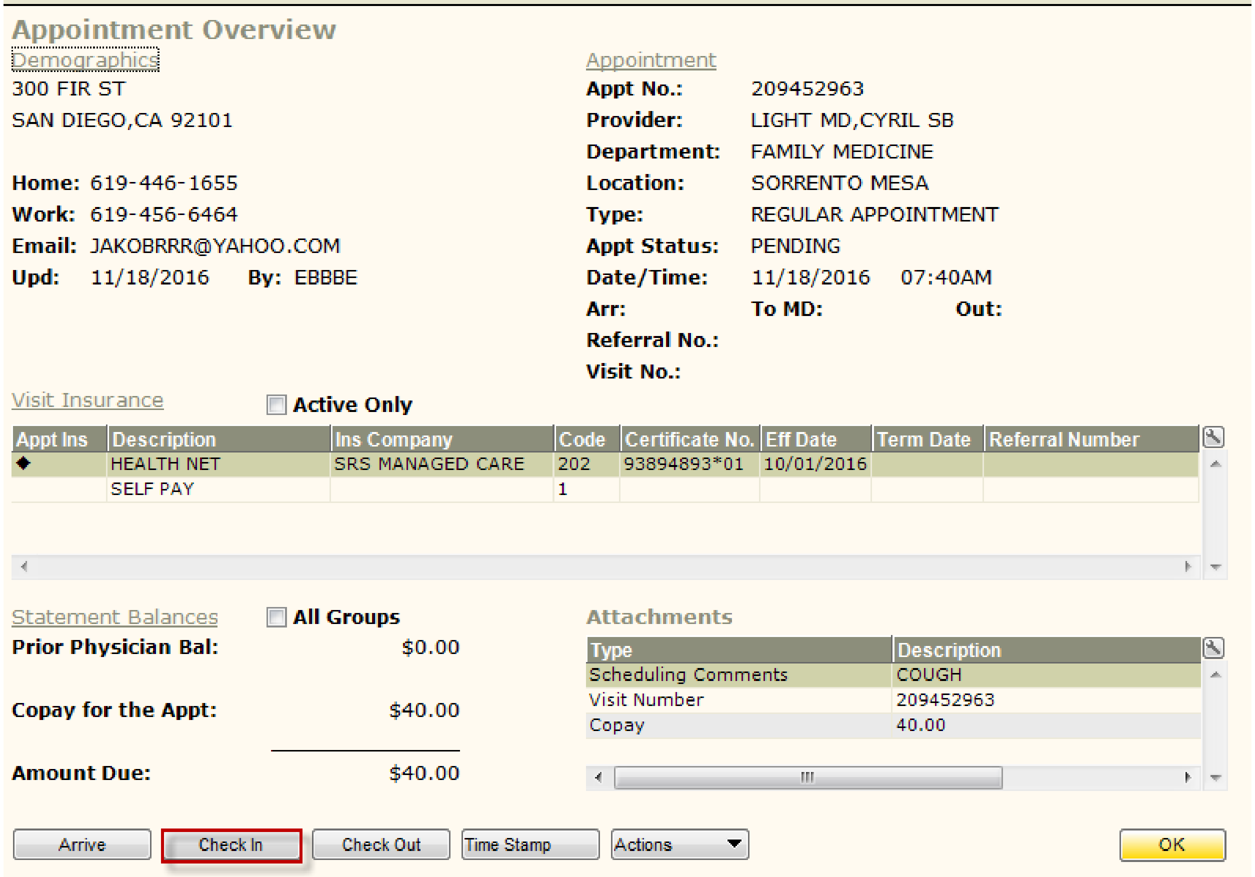
9) How much (%) is the prompt pay discount?
The Prompt Pay fee schedule is set at its own rate, which is competitive with the community standard.

10) Can I apply the prompt pay discount to the discounted self-pay OB package?
No. The self-pay OB package is already discounted. You cannot apply any additional discount.

Adding Alternate Insurance (Prompt Pay, vision, etc)
Wipe Clean

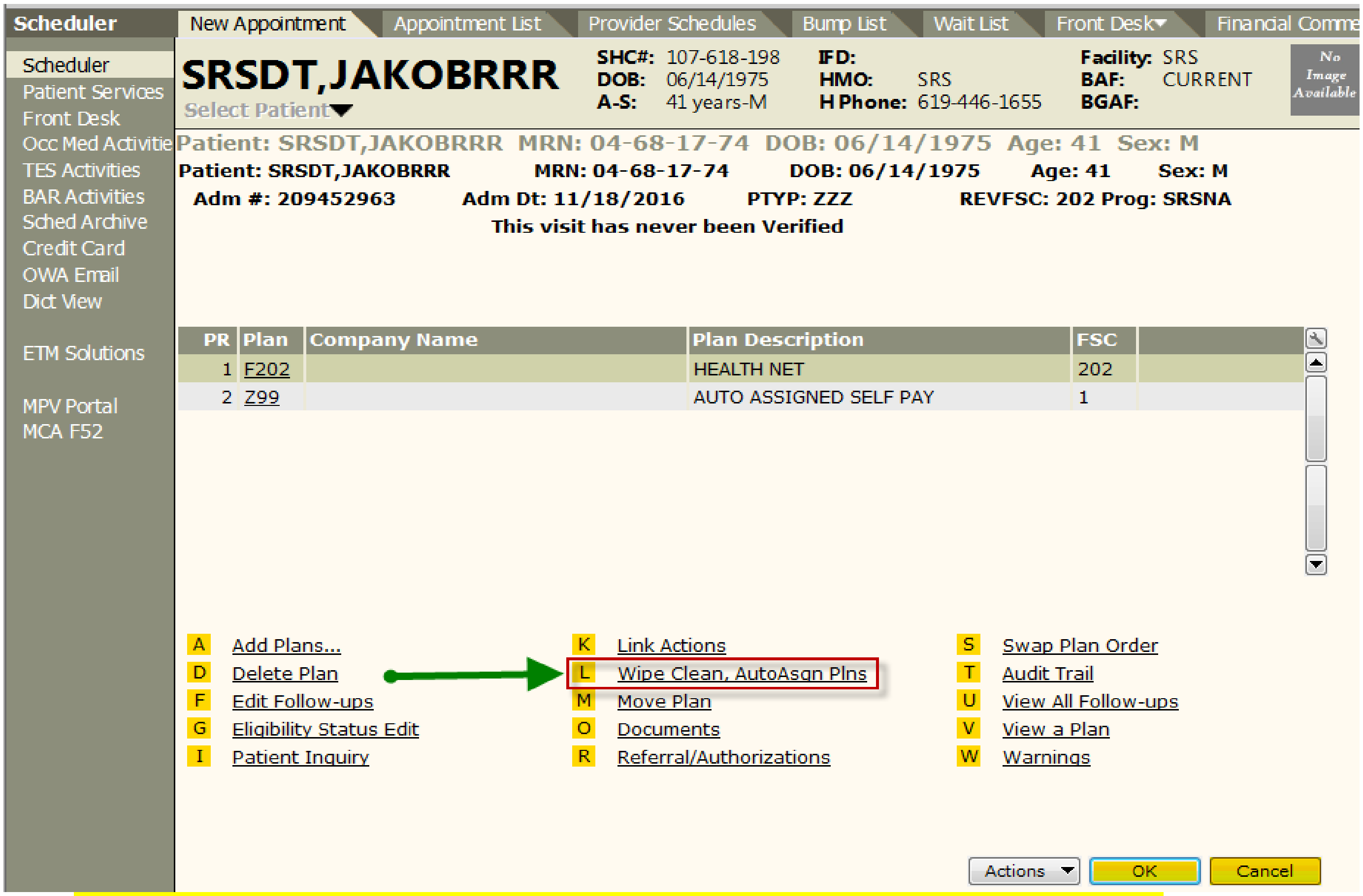
When a patient has medical insurances on file and would like to use an alternative insurance for example: vision plan or prompt pay, you will need to update the visit insurance.

- Follow standard Check-In workflow
- Click Check In



Adding Alternate Insurance – Wipe Clean

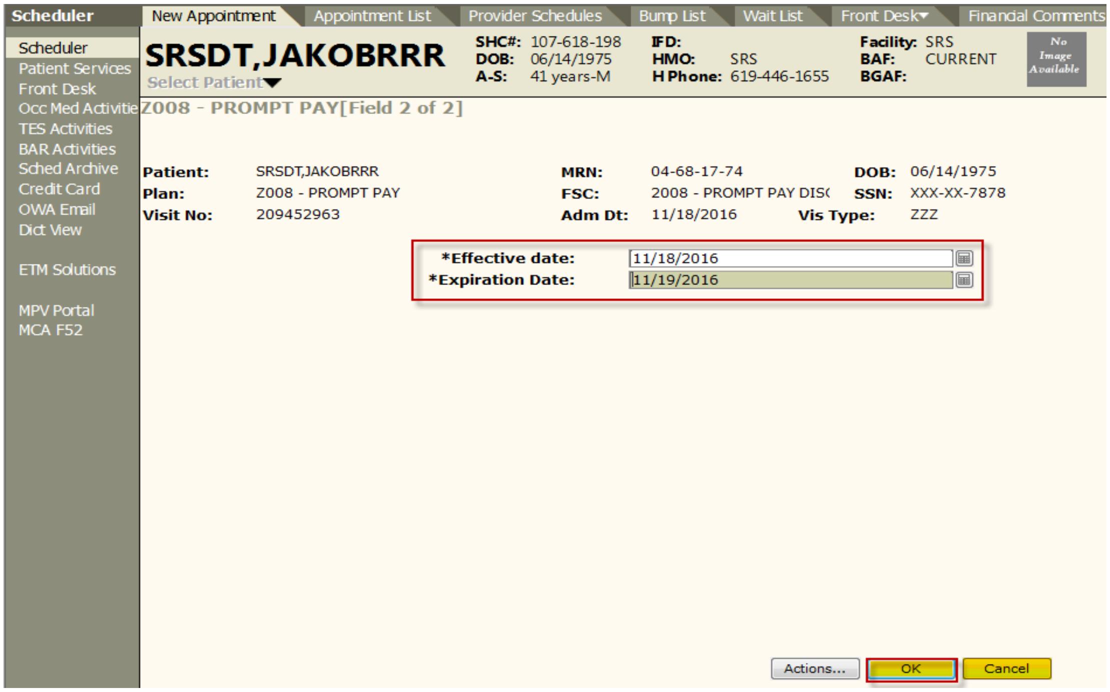
- Click **Wipe Clean, AutoAsgn Plns.** Action Code L with refresh the insurance for the specific visit. For this example, we will use the scenario of Prompt Pay.



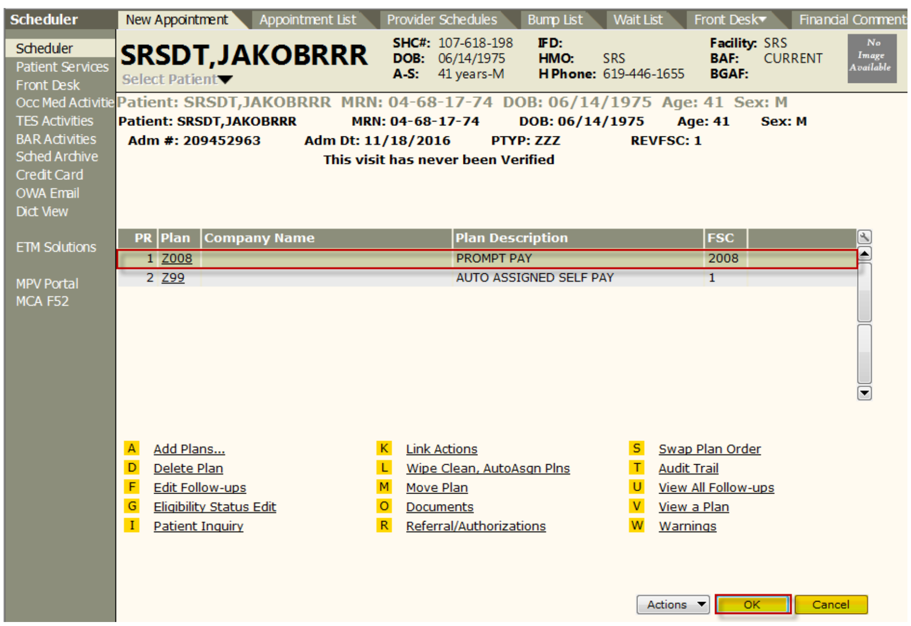
**** ***If Action Code L is not available, contact Support Services for next steps*** ****

Z008-Prompt Pay screen will display

- At Effective date, type **today's date** or click the calendar icon and select today's date
- At Expiration date, type **tomorrow's date** or click the calendar icon and select tomorrow's date
- Click OK



- Prompt Pay has now been added to the visit insurance screen
- Click OK

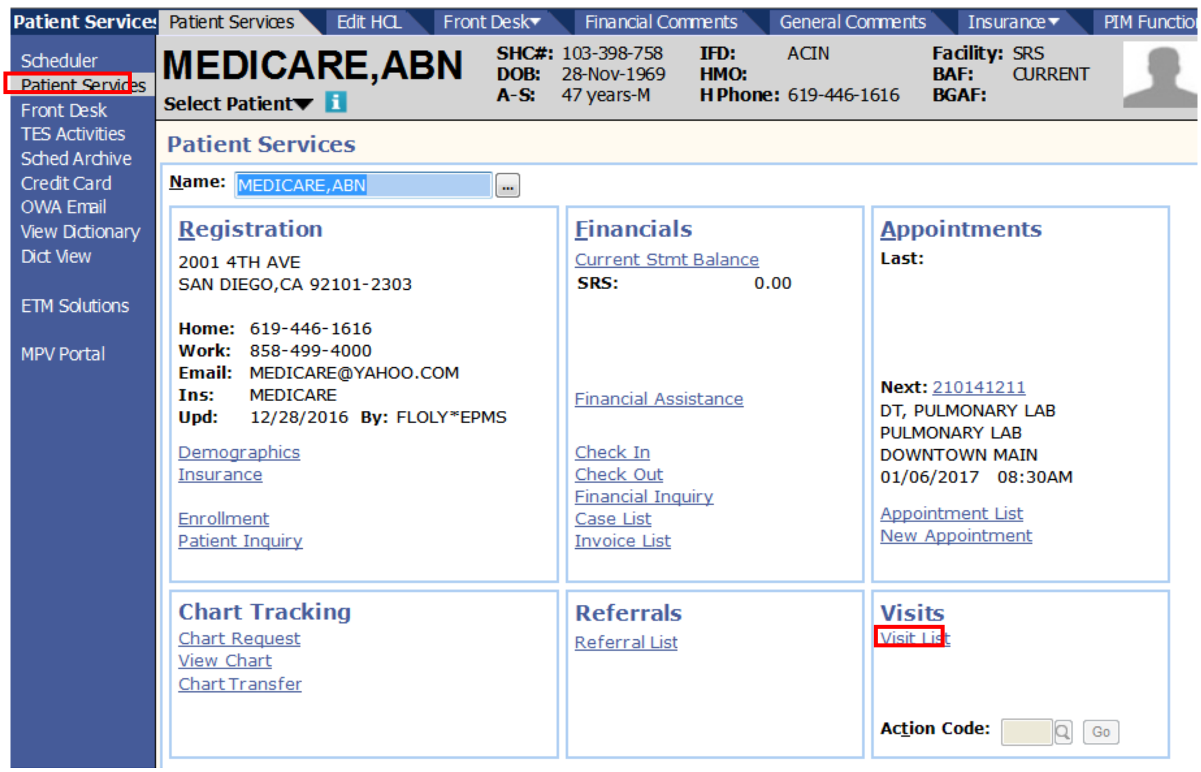


- Alerts screen will display. Correct any alerts that need to be addressed.
- Continue with confirming your batch, entering the visit # & typing receipt comments

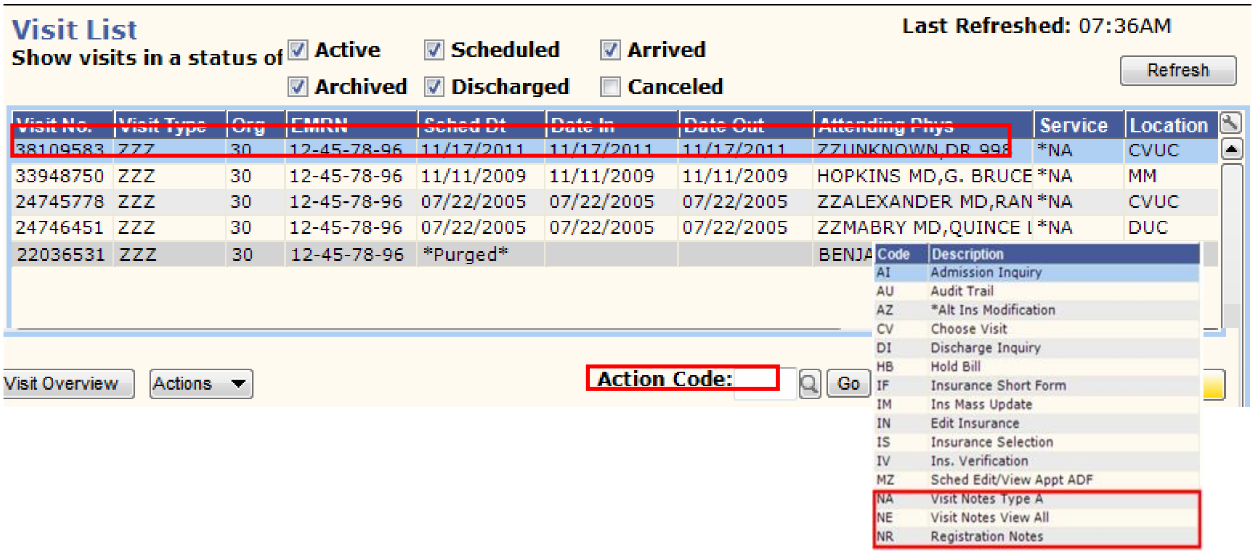
Visit and Registration Notes

Patient Service Representatives and Business Service Representatives input visit notes in a patient's account for billing and insurance issues. The visit notes serve as a written record of discussion with patients regarding their accounts or provide Patient Financial Services (PFS) with additional information.

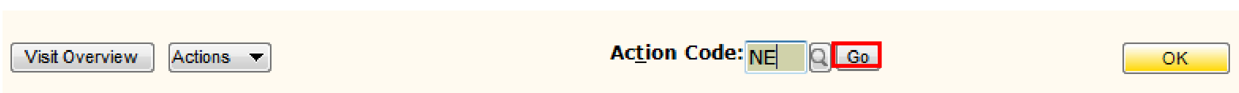
- Using the vertical tool bar, click Patient Services
- Click on Visit List



- Highlight the correct appointment



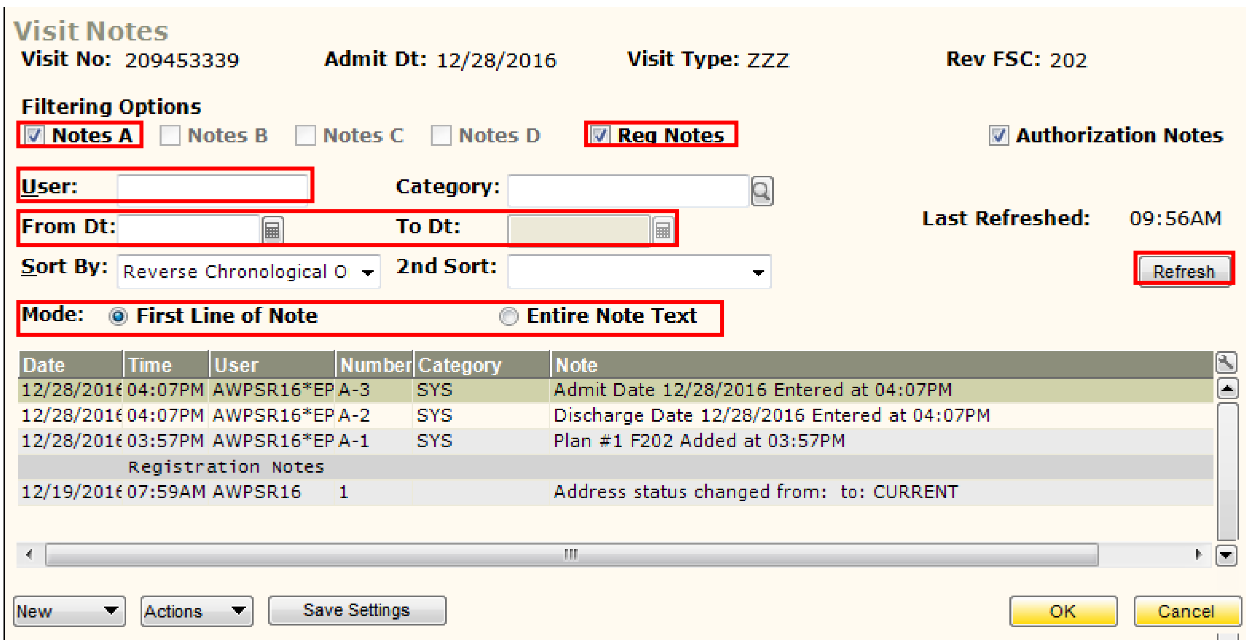
- At the Action Code: click the magnifiying glass



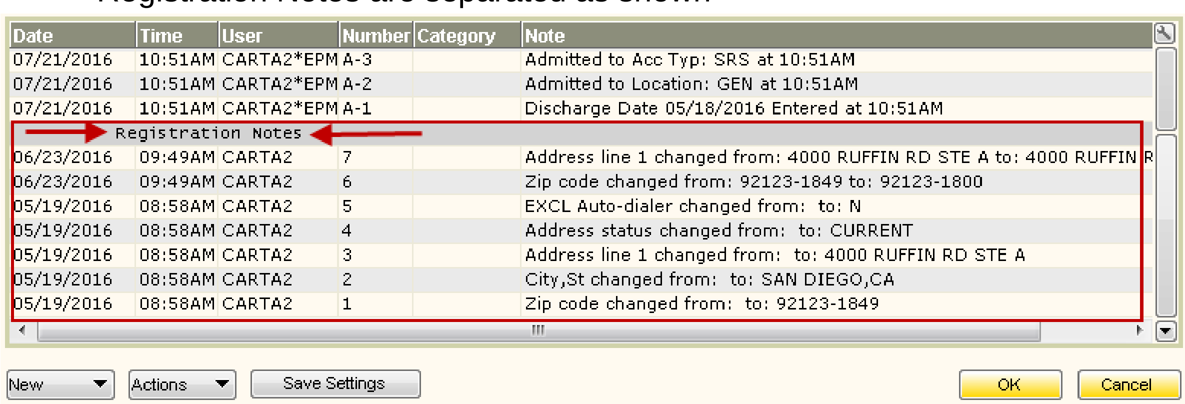
- Click (NE) Visit Notes View All
- Click GO

Filtering Options

- Fill in any of the “filtering options” and click the Refresh button.
- The options chosen will display
- To clear the filtered options, remove the information out of the boxes and select the Refresh button.



- Visit Notes are on top and are numbered with A - #
- Registration Notes are separated as shown

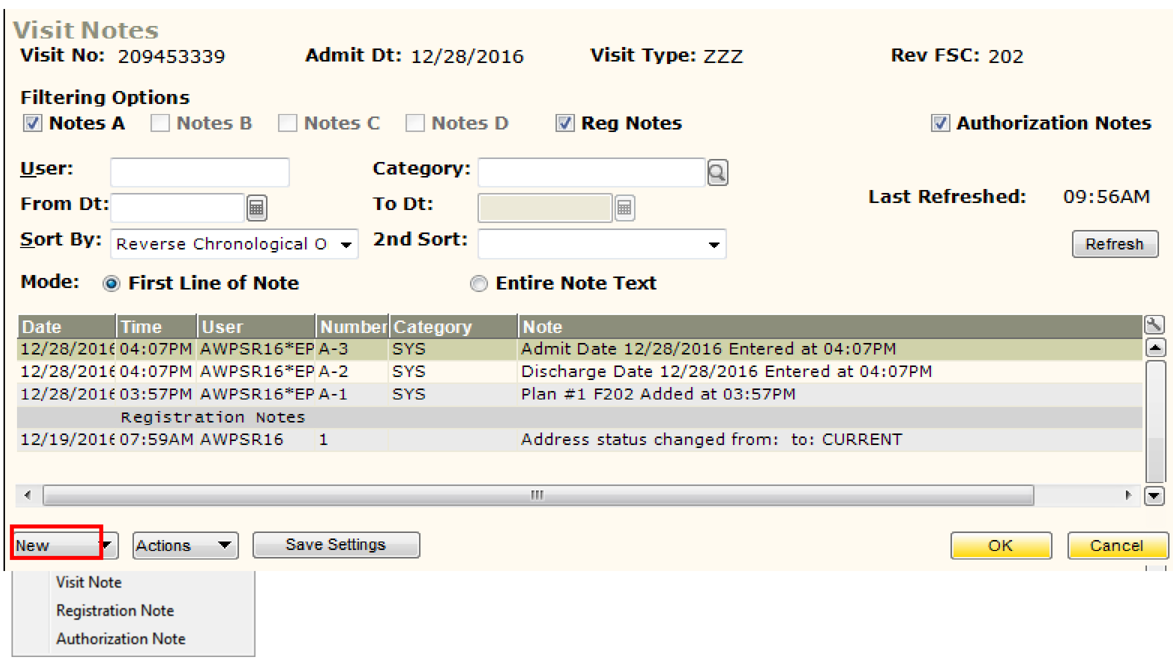


Visit and Registration Notes

Adding a New Visit or Registration Note

Whenever visit or registration notes are entered, your user initials, date, and time are entered automatically. Once a note has been entered and saved, the note will remain permanently in the patient's account.

If an account note has been entered into the wrong account, a new note must be entered stating the line # of the incorrect note and the account # or visit # where that note should have been documented.

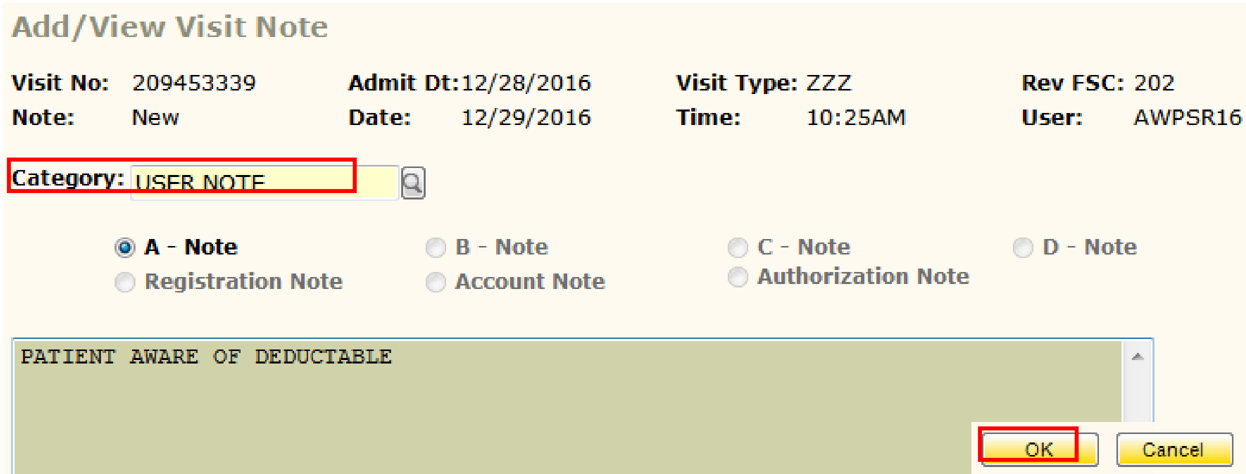


- Click **New**
- Choose the type of note you want to enter

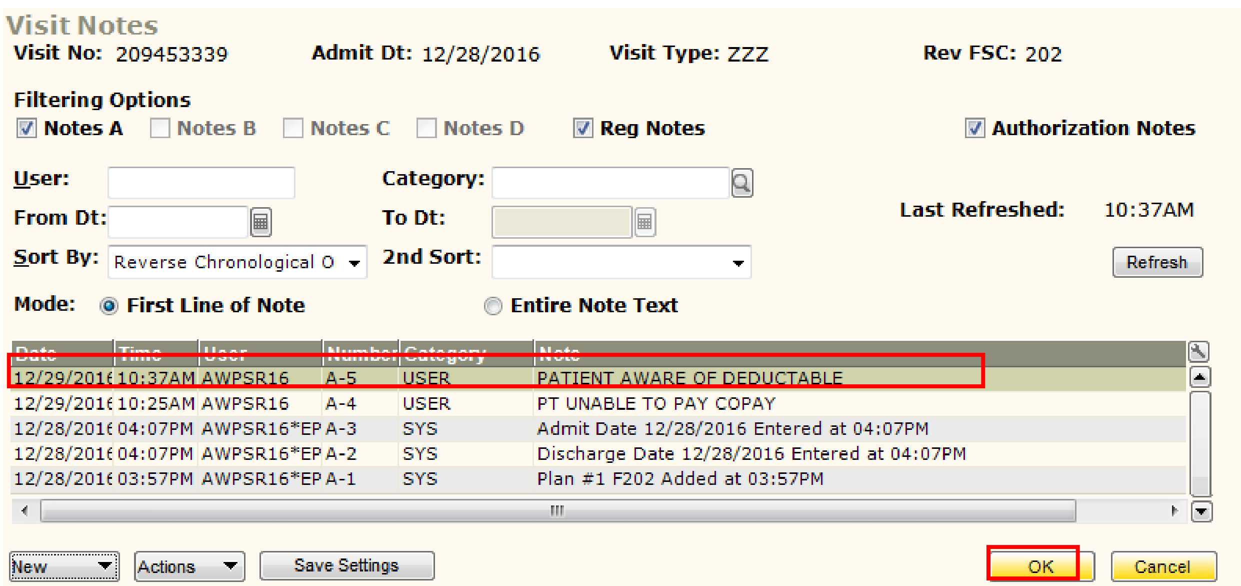
Notes (NE) For Notes Everything		
Action Code (AC)	NA (Visit Note Type A)	NR(Registration Notes)
Used for	Insurance and billing issues	Address, phone number and additional patient information

Visit and Registration Notes

- Add/View Visit Note Screen will display
- Category: click the magnifying glass



- Click in the text box, enter an applicable note
- Click OK



- Click OK

Things to Remember When Entering Visit Notes

- Keep it professional. Do not enter any foul language, opinions, or derogatory comments.

- It is a legal document and can be subpoenaed.

- You can abbreviate-- as long as words are easily understandable and distinguishable.

When to Enter Visit Notes

- When verifying a patients insurance eligibility.
  - Ex: Verified HCC ins cov. Pt elig w/SRS per web.
  - Ex: Called AET, spk w/John.Verified eligibility for 1/1/2011. Conf:#

- When a co-pay is due and wasn't collected.
  - Ex: Pt couldn't pay co-pay for DOS 1/1/2016 Dr Smith.

- Why a patient didn't sign a C.O.R.
  - Ex: Gave COR to pt. didnt sign and rtrn.

- When there is no BSR available for assistance.
  - Ex: No BSR available, filled out BCF.

- When deductible explained.
  - Ex: Deduct explained to patient.