

Patient Credits

Quick Reference Guide for RCM Clients


Patient Credit Overview

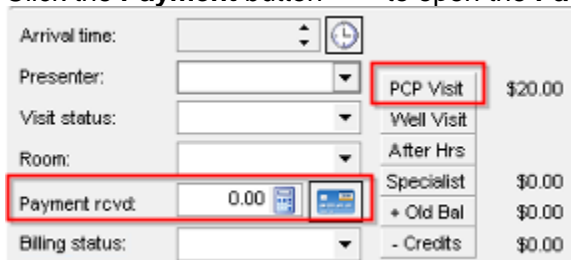
In a general pediatric practice, you may collect multiple types of patient credits from patients including but not limited to: copays, coinsurance, deductible, self pay payments, payments for medical supplies, concierge fees, form fees, no show/cancelation fees, etc. In most cases, the process for applying these credits falls into two groups.

Patient Copays & Pre-Service Collections

If you are collecting a payment for a service that has not yet been billed to the insurance company or for a service that will not be billed to the insurance company, these are often collected before the service is performed. For example, maybe your patient came in for a visit, and you collected a copay or high deductible payment upfront. When you have collected payment prior to a claim being created for that visit, you will need to apply that payment to the patient's credit account. This will allow the OP RCM team to know that a credit was taken for the visit. Make sure you are putting a note in the credit as to which DOS or service this credit was collected for.

Entering a Copay from the Calendar:

1. Click the **Schedule** button located in the Clinical, Practice Management, or Billing tab to open the Schedule.
2. Select the **Calendar** radio button, if not already selected.
3. Locate and double-click the **Appointment** to open the Add/Edit Appointment window.
4. Click the **PCP Visit** button to populate the copay amount (from the patient's Insurance record) in the **Payment rcvd** field.
5. Click the **Payment** button  to open the **Patient's Credit Account** window.



Arrival time:	<input type="text"/>	<input type="button" value="Clock"/>
Presenter:	<input type="text"/>	<input type="button" value="PCP Visit"/> \$20.00
Visit status:	<input type="text"/>	<input type="button" value="Well Visit"/>
Room:	<input type="text"/>	<input type="button" value="After Hrs"/>
Payment rcvd:	<input type="text" value="0.00"/>	<input type="button" value="Payment"/>
Billing status:	<input type="text"/>	<input type="button" value="Specialist"/> \$0.00
		<input type="button" value="+ Old Bal"/> \$0.00
		<input type="button" value="- Credits"/> \$0.00

6. Proceed to **Enter a Credit** instructions below.

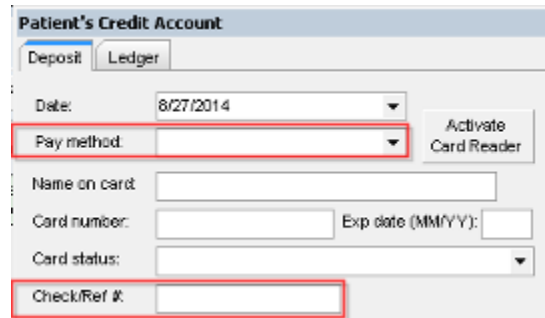
Entering a Copay from the Patient Chart:

1. Click the **Patient Chart** button located in the Clinical, Practice Management, or Billing tab to open the Patient Chart.
2. Search for and select the **Patient**.
3. Click **Credits** in the Account section of the Window Navigation Panel.
4. Click the **New Credit** button.

5. Proceed to **Enter a Credit** instructions below.

Enter a Credit:

1. Select the **Pay method** from the drop-down menu. If integrated with Instamed Merchant Services, click [here](#) to learn how to enter credits using the swipe device.
2. If applicable, enter the **Check Number** in the Check/Ref # field.



3. Enter the amount of the credit being collected in the **Patient Credit Amount** field.
4. Enter the credit details/explanation in the **Note** field, if appropriate (e.g., payment received from mom).
5. Select the **Provider** from the drop-down menu.
6. Click the **Save/Post** button at the bottom of the window to save and exit the window.

If you are entering a credit card payment and use Instamed Merchant services, please visit this [help center link](#) for additional instructions on how to handle this.

Balances

If you are collecting a payment for a past service or for an outstanding balance, you can apply this directly to the claim. This allows you to determine exactly how much should be applied to each CPT code and claim and provide feedback to the patient on what their outstanding balance will be after those payments have been applied.

1. Click the **Patient Chart** button located in the Clinical, Practice Management, or Billing tab to open the Patient Chart.
2. Search for and select the **Patient**.
3. Click **Payments** in the Account section of the Window Navigation Panel.
4. Click the **New Payment** button.
5. Click on the **Patient** tab.
6. Choose the **Payment Method** from the drop-down menu. If applying a credit, select **Patient Credit**.

Add Payments and Adjustments

Date: 8/29/2014

Pay method: CK CHECK

Check/Ref #: M Ck

Memo:

Amount: .00 Pay in Full Allocate

Patient Insurance

7. Select the **Service Line** and **Svc.Date** where the Patient will be posted. The oldest date of service is displayed at the top.

Claim#	Svc Date	Rend Prv	Bill Prv	CPT	CPT Description	Charge	Balance	Payment	Adjust	Adj Reason	Unpaid	Patient Action
100014	01/06/2014	107	107	81001	URINALYSIS, AUTO WSCOPE	25.00	25.00				25.00	
100014	04/23/2014	107	107	92583	SELECT PICTURE AUDIOMETR	25.00	25.00				25.00	
100014	04/23/2014	107	107	81001	URINALYSIS, AUTO WSCOPE	25.00	25.00				25.00	
100014	04/23/2014	107	107	90648	HB VACCINE, PRP-T, IM	40.00	40.00				40.00	
100014	04/23/2014	107	107	90471	IMM ADMIN, FIRST, NON-PHYS	40.00	40.00				40.00	

8. Enter the **Payment Amount** in the **Payment** field.

Add Payments and Adjustments

Date: 8/29/2014 Name on card: Primary in

Pay method: CK CHECK Card number: Secondary

Check/Ref #: 123 M Ck Exp date: (MM/YY) Default st

Memo: Card status: Claim note

Amount: 25.00 Pay in Full Allocate Activate Card Reader Claim num

Patient Insurance

Claim#	Svc Date	Rend Prv	Bill Prv	CPT	CPT Description	Charge	Balance	Payment
I 100014	01/06/2014	107	107	81001	URINALYSIS, AUTO WSCOPE	25.00	25.00	25.00
100014	04/23/2014	107	107	92583	SELECT PICTURE AUDIOMETR	25.00	25.00	
100014	04/23/2014	107	107	81001	URINALYSIS, AUTO WSCOPE	25.00	25.00	
100014	04/23/2014	107	107	90648	HB VACCINE, PRP-T, IM	40.00	40.00	
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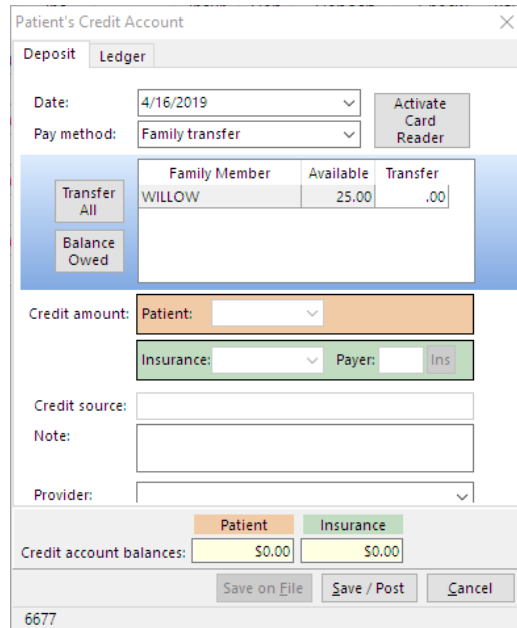
9. Click the **Save and Close** button to exit the window.

***You can also enter a credit card directly into this screen.*

Family Credit Transfers

If you are collecting payments before, during, or after a service is provided, you may want to collect all of the money on one patient's account instead of duplicating the process on each siblings' account. Once you have collected the money, you will want to move it to the correct accounts for each sibling. Siblings are linked by financial guarantor.

1. Navigate to the Patient Chart of the Patient that has the balance and needs a credit from a sibling.
2. Click **Credits**.
3. Click the **New Credit** button. The Patient's Credit Account window is displayed.
4. Select **Family transfer** from the Pay Method drop-down menu. The Family Transfer grid displays listing the available credits in all of the patient's siblings' accounts.
5. Enter the **Amount** of the credit being transferred from the sibling(s) in the **Transfer** field or click the **Transfer All** or **Balance Owed** button, as appropriate.



The screenshot shows the 'Patient's Credit Account' window with the 'Ledger' tab selected. The 'Date' is set to 4/16/2019 and the 'Pay method' is 'Family transfer'. A table lists available credits from family members, with 'WILLOW' having 25.00 available and a transfer of .00. The 'Credit amount' is set to 'Patient'. The 'Credit account balances' section shows 0.00 for both Patient and Insurance. Buttons for 'Save on File', 'Save / Post', and 'Cancel' are at the bottom.

Family Member	Available	Transfer
WILLOW	25.00	.00

Credit amount: Patient:
Insurance: Payer: Ins
Credit source:
Note:
Provider:

Credit account balances: Patient: \$0.00 Insurance: \$0.00

Save on File Save / Post Cancel

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6. Click the **Save / Post** button to save and close the window. Both the patient and sibling credit accounts will be credited/debited accordingly.