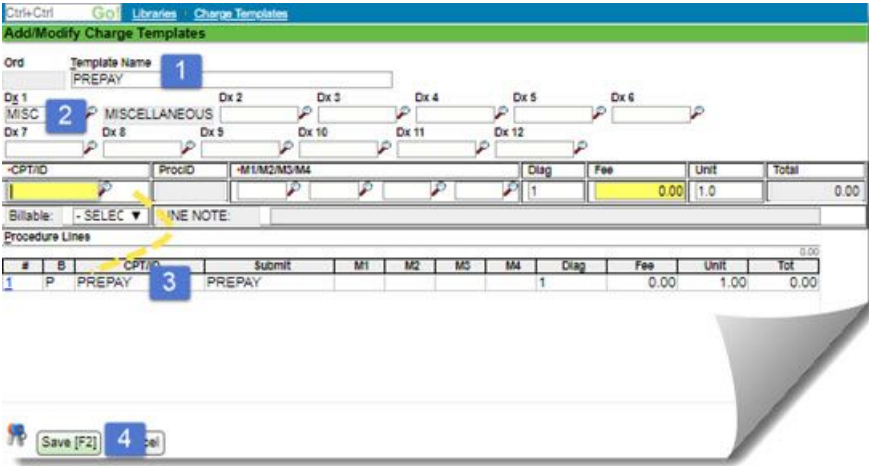
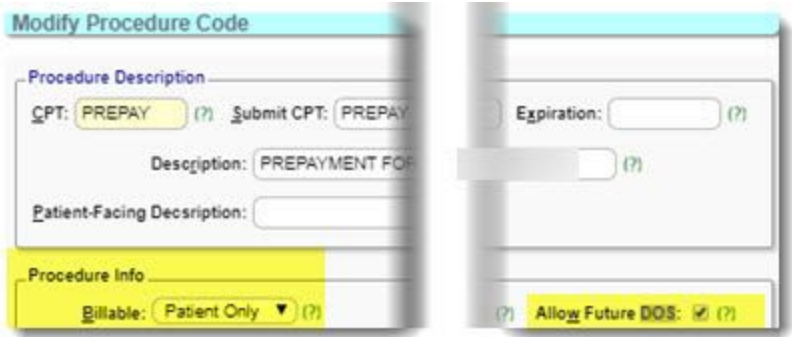


CATEGORY: PATIENT PAYMENT ~ TASK: PREPAYMENT

This workflow allows for groups to not leave Receipts in escrow for prepaid services

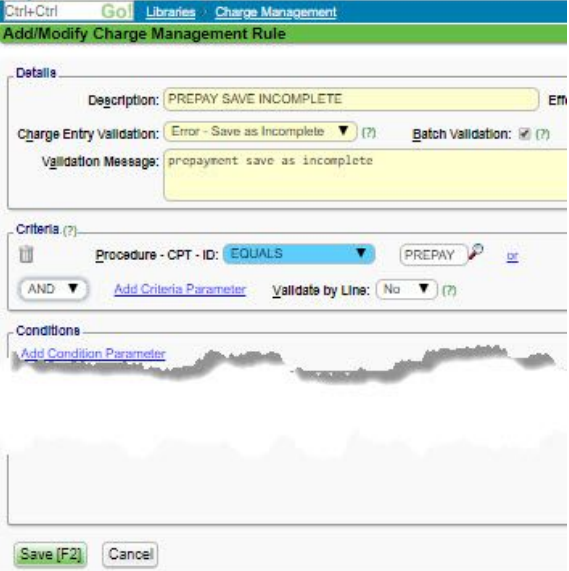
Setup

- Create a CPT Code: Libraries > Procedure Codes > Add. Use a code like: PREPAY Billable = 'Patient Only. Choose: 'Allow Future DOS'.
- Next, create a Charge Template: Libraries > Charge Template

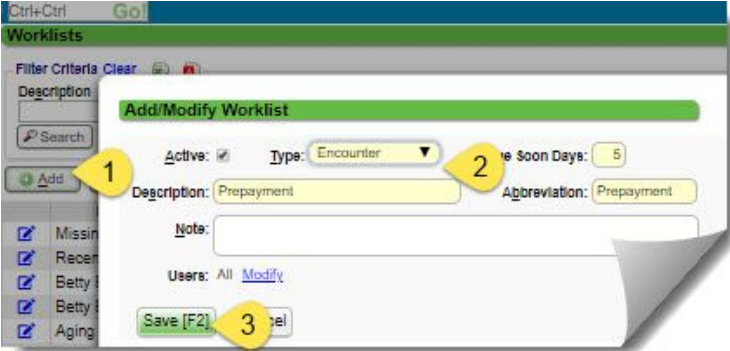


1. Prepay or other name
2. MISC DX
3. Use new CPT
4. [SAVE]

- Use a Charge Management Rule: Libraries > Charge Management, to prevent users from accidentally 'completing' a charge with PREPAY CPT. This keeps the charge 'Incomplete', which keeps the charge from being reported while allowing payments to post to this charge, instead of leaving the Receipt 'in escrow'



- Create a Worklist to track pre-payments
 1. [Add]
 2. Type: Encounter
 3. Description: Prepayment
 4. [Save]



CATEGORY: PATIENT PAYMENT ~ TASK: PREPAYMENT

- 1) Create an Incomplete Charge
 - a) Insurance > Choose **Self Pay**
 - b) Use the PREPAY Template
 - c) In the DOS Popup, enter a date
 - d) Use the [Copy] button to enter the Receipt

Modify Charge

Post Date: 10/03/2019 | Reference Batch: 2747 | Claim Type: Professional

Patient: 10008 | DYLAN, BOBBY | 12/13/1974 | 44 years 9 M | F

Last Service: 10/03/2019 (7) | Insurance: BCBS (YRP1234555) / PATIENT [No Eff] | SELF PAY

Claim: Facility: 5 | POS: 11 | Rendering: LAF | Billing: LAF | Template: 2 - PREPAY

Diagnosis: Dx 1: MISC

Procedures: DOS: 10/03/2019 | Facility: 5 | POS: 11 | Billable: YES

Payments: [E]

Line	Billable	DOS From	Facility	POS	Submit	CPT	M1	M2	M3	M4	Dx Link	Fee	Unit	Payment	Del
1	P	10/03/2019	5	11	PREPAY	PREPAY					1	0.00	1.00		

Validation Error:

- prepayment save as incomplete
- You are saving incomplete Charge

prepay [Save]

- e) Click [Payment] to Post the payment from the Receipt

S	From	CPT	Total Fee	Payment	WQ/Code	WQ/Amount
P	10/03/2019	PREPAY	0.00	500.00		0.00

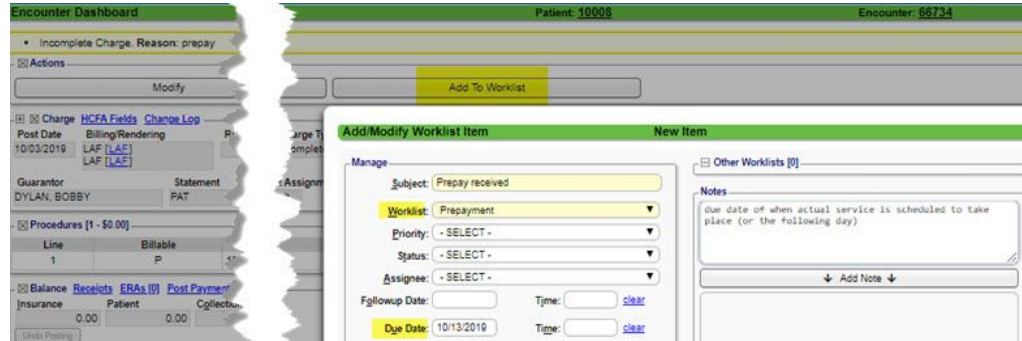
Submit

OK, payments were distributed. You can click on Save button to post the charge and payments

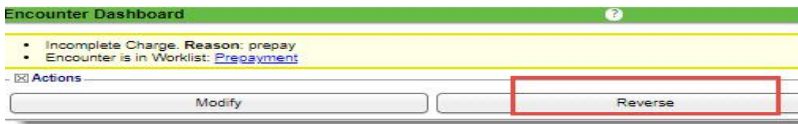
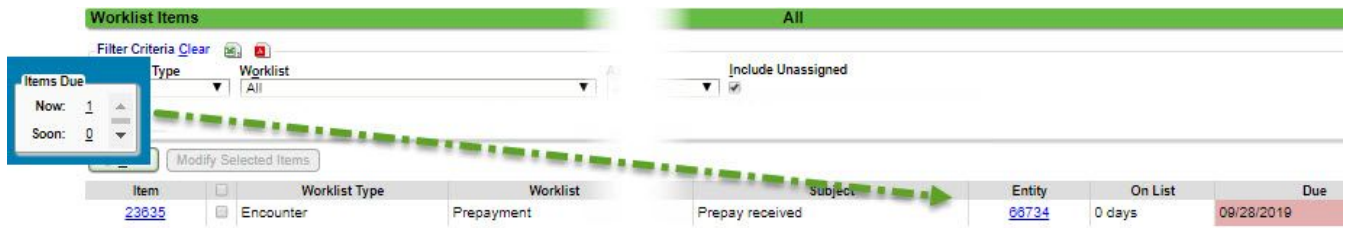
- i) Enter payment
- ii) [Submit]
- iii) Confirmation

CATEGORY: PATIENT PAYMENT ~ TASK: PREPAYMENT

- f) Choose Incomplete as the Charge Type
 - g) For 'Next Action' > Proceed to Encounter
 - h) [Save] the Encounter
 - i) In the Incomplete Reason popup Add a Note: "Prepay" > [Save]
- 2) From the Encounter Dashboard > [Add to Worklist] > use a 'Due Date' to act as a reminder for when the service is to be rendered

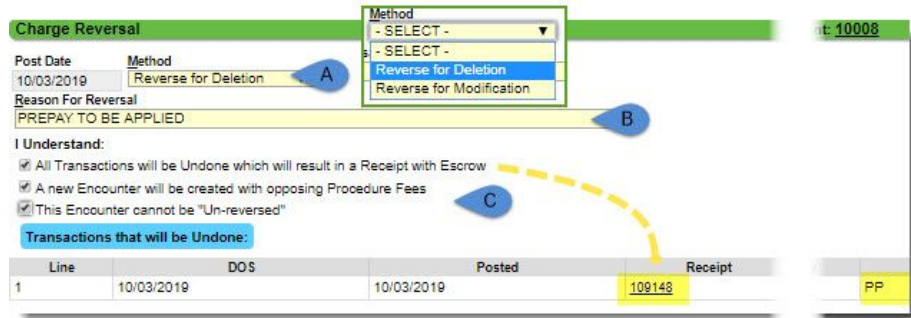


- 3) Select Encounter (Entity) from Worklist. From the sidebar 'folder' click hyperlink by due 'Now'



- 4) Encounter Dashboard > [Reverse] - puts \$ in Escrow to reapply to the new charge

- a) Reverse for Deletion
- b) Enter Note
- c) Confirm > [Save]



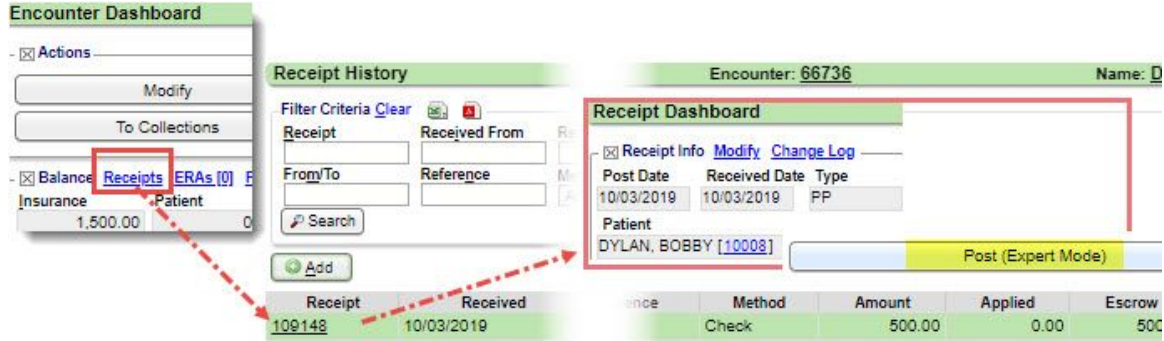
- 5) Go to Patient Dashboard, enter a new charge manually or use the Incomplete Encounter from the EHR that contains the prepaid service



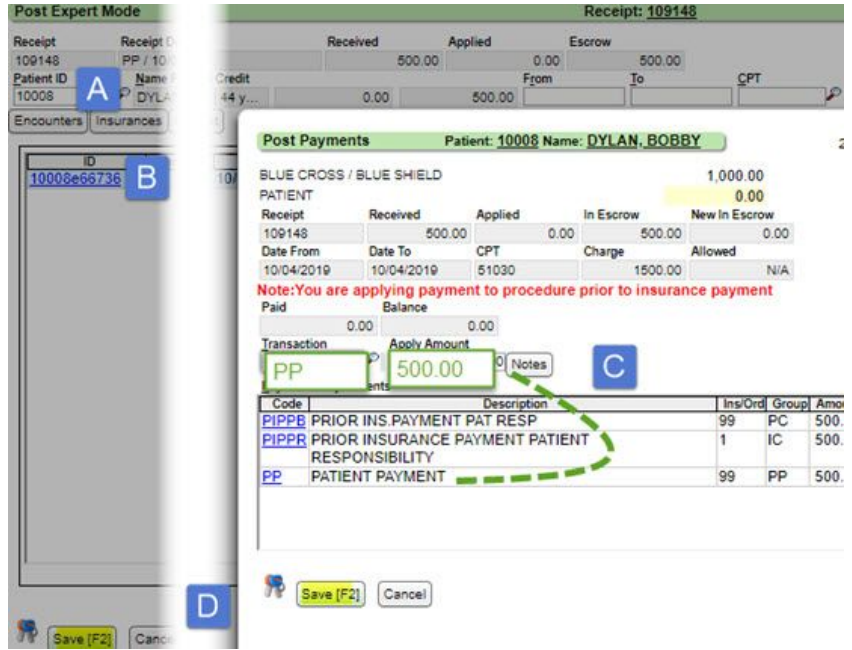
- 6) Complete/save charge - proceed to Encounter

CATEGORY: PATIENT PAYMENT ~ TASK: PREPAYMENT

7) Click 'Receipts' hyperlink > choose Receipt in Escrow > [Post Expert]



- 8) Post to the correct Encounter
- Patient
 - Choose Encounter > line(s)
 - PP (Patient Payment) Transaction
 - [Save] twice



9) Resolve/Complete Worklist item

