CATEGORY: PATIENT PAYMENT ~ TASK: PREPAYMENT

Modify Procedure Code

Patient-Facing Decsription:

Billable: Patient Only (?)

Procedure Description

CPT: PREPAY

Procedure Info

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



Prepay or other name
 MISC DX

Expiration:

(?)

Allow Future DOS: 12 (?)

(?)

- 3. Use new CPT
- 4. [SAVE]

(?) Submit CPT: PREPA

Description: PREPAYMENT FO

 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'

Description:	PREPAY SAVE INCOMPLETE EM
Charge Entry Validation:	Error - Save as Incomplete (?) Batch Validation: (?)
V <u>a</u> lidation Message:	prepayment save as incomplete
Criteria (?)	
Procedure -	CPT - ID: EQUALS

Ctrl+(Ctrl	Gol
Work	dists	
Filter	r Criteria	ear 🐵 💼
Des	cription	Add/Modify Worklist
PS	Search	Active: Dype: Encounter 7 2 te Soon Days: 5
0 1	Vqq	Description: Prepayment Abbreviation: Prepayment
Ø,	Missin	Note:
Ľ	Recen	
Ľ	Betty I	Users: All Modify
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• Create

а

Save [F2] Cancel

Worklist

to track pre-payments

- 1. [Add]
- 2. Type: Encounter
- 3. Description: Prepayment
- 4. [Save]

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 [Copay] button to enter the Receipt

Modify Charge	0	
Post Date: 10/03/2019 Reference Batch: 2747	Claim Type: Professional	
. Patient		
Patient: 10008 Edit DYLAN,	BOBBY 12/13/1974 44 years 9 M F	
Last Service: 10/03/2019 (7)		
Cage: (- SELECT -	A Insurance: BCBS (YRP1234555) / PATIENT (No Effective BCBS (YRP1234555) / PATIENT (No Effective	No Expiration] (DEFAULT)
Guarantor: Dylan, Bobby (DEFAULT)	SELF PAY	
. Claim		
Facility: 5 POS: (11 P Rendering: LAF P Billing: LAF P	
Referring:	Attanding Destament DATIENT BILLIN	G V)
B atted - SELECT -	DOS are	
1 - CREDIT BALANCE FROM OLD S	IYSTEM C	-
		Post Copay
Billing Note:	Save [F2] Cancel	Post Uncollected Copay ¹⁵ Posted
Diagnosis (kors 10		Received Date Received From
Dx 1: MISC P Dx 2: P Dx 3:	Dx 4: P Dx 5: P Dx 6:	10/03/2019
Nicelianeoux		5500.00 \$0.00 \$0.00 \$500.00
DX1. DX3.		Check Date Ref.No/Check No PO§ Pay 12345 - SELE
Procedures		Use This Amount as Copay
DOS: 10/03/2019 Facility: 5	P POS: 11 P CPT: P M1: P M2: P M3:	Apply This Amount as Patient Payment
Dy Link: Plilable: YES	Office Linite: Total:	Note
Line Note:		
Procedures Receipts Note Payments		Same (57) Carral
1 P 10/03/2019 5 11	PREPAY PREPAY 1 0.00 1.00	Copay 11
		×
	Validation Error	
	 prenavment save as income 	molete
Force Brimany Claim to Baper: E P. Charge Type:	 Incomplete T F artitla Assignment You are saving incomplete 	e Charge
Foreight State Alabar (Sector Date "	- Production	
Encounter cialm status: (system Lierault	Incomplete G prepay	Save
Save [F2] H cel Next A	ction: (Proceed to Encounter V) Press "Eac" or dick the "X" to cancel.	

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



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- 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

Encounter Dashboard	3	Patient: 10008	Encounter: 66734
Incomplete Charge, Reason: prepay			
- IEI Actions	1. Contraction of the second s		
Modify		Add To Worklist	J
H S Charge <u>HCFA Fields</u> <u>Change Log</u> Post Date <u>Billing Rendering</u> P: 10/03/2019 LAF <u>[LAF]</u> LAF [LAF]	arge Ti smplet	Worklist Item	New Item
Guarantor Statement	sAssignm <u>S</u> ubj	ect. Prepay received	Notes
	Workd	ist Prepayment	due date of when actual service is scheduled to take
- 🖾 Procedures [1 - \$0.00]	Prior	ity: (- SELECT -	prece (or the following day)
Line Bilable	Stat	NS: (+ SELECT +	
	Assign	ee: (+ SELECT +	▼ ↓ Add Note ↓
Insurance Patient Collection	Fgllowup Da	ete: Tjme: <u>sie</u>	21
0.00 0.00	Due Di	nte: (10/13/2019) Ti <u>m</u> e: (2

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

Now: 1 Soon: 2 Item Worklist Type 23635 Encounter	Worklist Prepayment	Subject Prepay received	Ent <u>887</u>	ity On List 34 0 days	Due 09/28/2019
Encounter Dashboard Incomplete Charge, Reason: prepay Encounter is in Worklist: <u>Prepayment</u> Retions Modify	? Rever	4) [F	Encounter Da Reverse] - put eapply to the i	ashboard > s \$ in Escro new charge	w to
) Reverse for Deletion) Enter Note	Charge Revers Post Date 10/03/2019 Reason For Revers PREPAY TO BE I Understand:	Method Reverse for Deletion A sal APPLIED ns will be Undone which will result in a tree will be created with apposing Pro-	Method - SELECT - - SELECT - Reverse for Deletion Reverse for Modification - Receipt with Escrow redure Fees	B	at: <u>10008</u>
Contirm > [Save]	Transactions the Line	er cannot be "Un-reversed" hat will be Undone: DOS 10/03/2019	Posted 10/03/2019	109148	Receipt Pr
Go to Patient Dashboard, enter charge manually or use the Incomplete Encounter from the EHR that contains the prepaid service	Patient Dashboard	er cannot be "Un-reversed" hat will be Undone: DOS 10/03/2019 Encounter Dashboo Encounter is in N ERAS I This Encounter was	Posted 10/03/2019 Worklist: Pre reversed. ^{int} PostAc	Patient: <u>10008</u>	Patient: <u>10008</u>



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



9) Resolve/Complete Worklist item

