Phase 4

Phase 4 Introduction

During Phase 4 we will be reviewing the Post Payment section of the application to provide an understanding with the functionality to manage financials and improve cash flow with multiple payment methods. You can adjust charges while posting payments, post reversals and new payments all on the same check, transfer account credits, add multiple payments for one claim and post multiple payments at once. addition, we will then shift our attention to patient collections where we will set up patient statements, review statement tracker, adding of multiple Collections agency is needed and manage patient AR at a high level where this will all be covered in two training sessions.

In **Phase 4.1** we will review if applicable the In-app Payment Processing feature with accessing the porta from the application. We will review how to use the credit card processing feature within the applicatio sending Portal invites and accessing the In-app FAQs.

We will then review the Payment Settings and insure understanding of all defaults including the Unapplied Copay preferences. We will review the remittance codes, actions, adjustment codes and how to use them for the purpose of applying an ERA and completing patient account type adjustments. During this phase posting of patient payments should be in full swing. We will do an overview of insurance payments and the different drop-down actions that accompany this feature.

In the next portion of the training we'll move on and review the Manage Account in the Patient section where the following will be covered deleting/undeleting transactions, debit/credit account adjustments and refund/reversals at the patient level. In addition, the Payment Plan feature in the Patient section wil be reviewed where the convenience of creating installment amounts/plans and posting payment plan payments will also be reviewed.

An overview of the ERA section will be covered on how to search, apply ERA checks, view EOBs and how to troubleshoot ERA erros.

Lastly, we'll review the Payment tracker where all payments posted can be searched and reviewed including print receipt option.

In **Phase 4.2** we review everything on patient collections which will include setting up of Patient statements, types of statements, configuration, how to print statements from the Patient account and v Batch Printing. We will go over the Patient Info Sheet & Ledger compared to the Activity. How to assign for FDN and Collections under the A/R Control feature. In addition, adding Collection Agency and the collection agency charge status (If Applicable). Lastly, we will go over the Statement report, Patient Statement Comments report, Patient Statement Turned Off report, Patient w/Statements Printed X Times report, Statement Printed in a Date Range and Audit report to audit type - Statement Automation to track changes in the application.

Phase 4 Entrance Criteria

- Payer Agreement

    - Understanding New Agreement

    - Understanding Search Existing Agreement - Status

- Claim Control

    - Understanding Filters

    - Understanding Search Claims

    - Understanding Review Claims

    - Understanding Interface Claims (If Applicable)

    - Understanding Update Status and submit batch of Live Claims

    - Understanding RTCS Results

- Claim Tracker

    - Understanding Track Live Claims

    - Able identify and review clearinghouse and payer acceptance and rejected claims

    - Able to Create Filters (Yesterday, Last 7 days, & Last 30 days) search claims

    - Understanding and Read results - example Correcting, resubmitting and marking as Error Fixed

    - Understanding Right-click capabilities: Open Claim etc

    - Understanding and able to view Reports (Clearinghouse & Payer Generated), proof of timely filing (CA, SR, SB and SE files)

- Follow-up Management

    - Understanding Filters

    - Able to search claims submitted

    - Understanding batch options, adding notes, set follow-up, claim status

    - Understanding follow-up screen, reference information, contact payer info, benefits of using Expected Payment info

    - Understanding how to add Follow-up Note

Phase 4 Exit Criteria

- Post
  - Post one patient payment
  - Post one insurance payment
- View
  - Search & Edit an Applied Check
  - Understand Refund/Reversal (If applicable)
- ERA
  - Receive ERAs & Review Check (If Applicable)
  - View EOB (If Applicable)
  - Troubleshooting ERA Errors (If Applicable)
  - Understanding Remittance Codes & Actions
  - Missing or late ERA?
- Payment Tracker
  - Search posted payments
- Patient
  - Manage Account
    - Understanding Deleting/undeleting transactions
    - Understanding debit/credit account
      - Understanding Adjustment Codes
    - Understanding refund/reversals
- Statements
  - Configure Plain Text Statements
  - Configure Enhanced Patient Statements (If Applicable)
  - Configure Automated Statements (If Applicable)

- Print one patient statement

- Print one patient info/ledger sheet

- Understand How to Assign for FDN & Collections (Patient >AR Control)

- Understand Batch Print Statements

- Understand Statement Tracker

- Understanding Adding Collection Agency (Permission - Customer Set up)

- Statement Reports Available - Patient Statement Comments, Patient Statement Turned Off, Patient w/Statements Printed X Times, Statements Printed In Date Range, Audit Report (Audit Type - Statement Automation to track changes)

Phase 4 Training Actions/Homework

Action 1. Learn how to apply and view payments

- Post Payments

- View Payments

Action 2. Understand Account Credits and define best practices regarding when and how they should be used.

Action 3. Understand how to find or delete transactions, apply refunds and more using Manage Account Video)

Action 4. Save time using Electronic Remittance Advice or ERA (Video)

Action 5. Keep your patients in mind by offering and defining Payment Plan options and best practices.

Action 6. Determine patient collection expectations using Statement. Your Implementation Specialist will help you determine a workflow that suits your business needs.

- Automate Patient Statements

- Print Statements In-House

Action 7. Track payments an track statements to monitor payment reconciliation

In order to successfully complete Phase 4 of your training and move into Phase 5, you must complete all of your assignments indicated above. During Phase 4 you will learn how to manage payments, payment plans and determine your patient collections workflow using statements.