Manage Patient Estimates

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he Patient Estimates feature allows you to easily create Good Faith Estimates as required by the No urprises Act. Once an estimate is created using either the Scheduler or the Claim section, users can print ne estimate (as required by the No Surprises Act for uninsured or self-pay patients), send a statement lectronically or on paper), enter payments in CMD, or have the patients make the payment on the patient ortal.

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f you're the Auth Rep, follow the steps below to enable, configure, or disable the Patient Responsibility stimator:

1. Select **Account Administration** > **Services.**
2. Click the **button** next to Patient Estimates
3. The ***Enable Patient Estimates*** box **enables or disables** this service.
4. Find your **Patient Estimate Settings**:
    1. **Automatically create estimates when new Appointments are created?**
        1. Select **Yes** if you want to automatically create an estimate when creating a new appointment.

        > Automatic estimates can only be created on appointments with default procedure codes for the Appointment Type or Patient.

    2. **Automatically create estimates when new Claims are created that don't already have estimates?**
        1. Select **Yes** if you want to automatically create a quick estimate when creating a new claim, and the claim does not already have an estimate.
    3. **Automatically create estimates when the above changes are made via Interface?**
        1. Select **Yes** if you want to automatically create an auto or quick estimate when creating a ne appointment or claim (options 1 and/or 2) from an SIU or DFT message received via the interface.

        > The available estimates for Interface Automations depend on your Practice's selected Default Estimate Options. These options are either Auto (based on eligibility) or Quick (based on copay).

5. Click **Save**.

⚠ Usage of this feature requires that the **Real-Time Eligibility** Service is enabled.