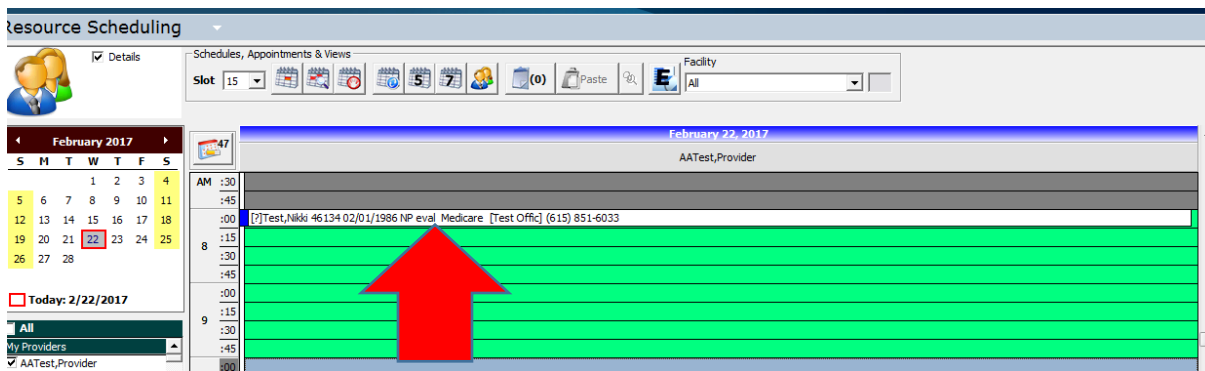


eClinicalWorks Training: Logging Patient Payments & Running the Daily Payment Report

In the ADI eClinicalWorks database each patient payment that is received by the practice is logged into the appointment window, and at the end of the day staff generate the Day Sheet to verify and account for each payment. This payment log along with the daily payments are sent via courier to PhyData for posting in Imagine.

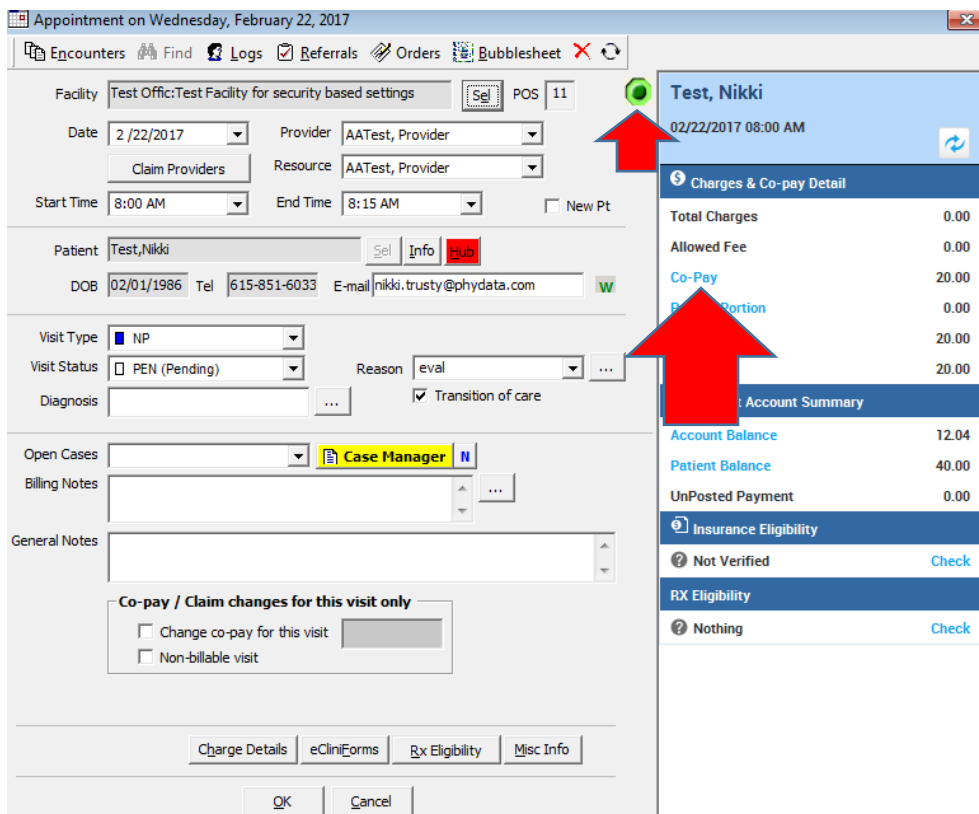
Logging Payments:

As your patient arrives for their appointment, the front desk employee will double click the appointment from the Resource Schedule to begin the check-in process.



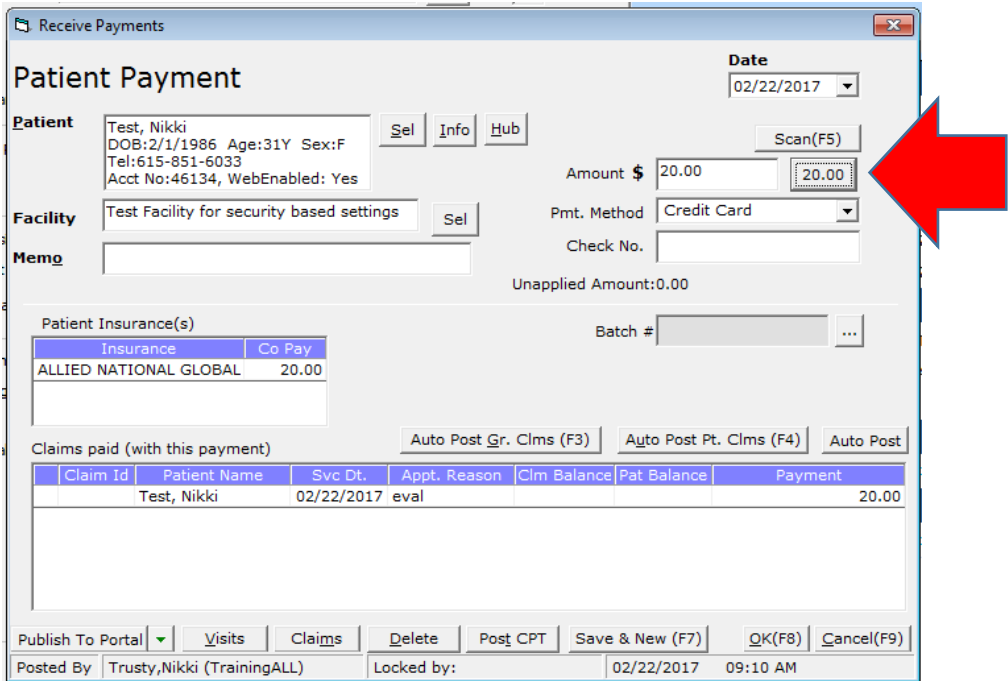
The Appointment window will then appear. When collecting the patient's copay for the visit, the front desk employee will click the "Copay" button in the right side car.

Note: If your view of the patient appointment does not include this right side car view, click the red circle at the top right of the appointment window. This will show the right side car and turn the red circle green.



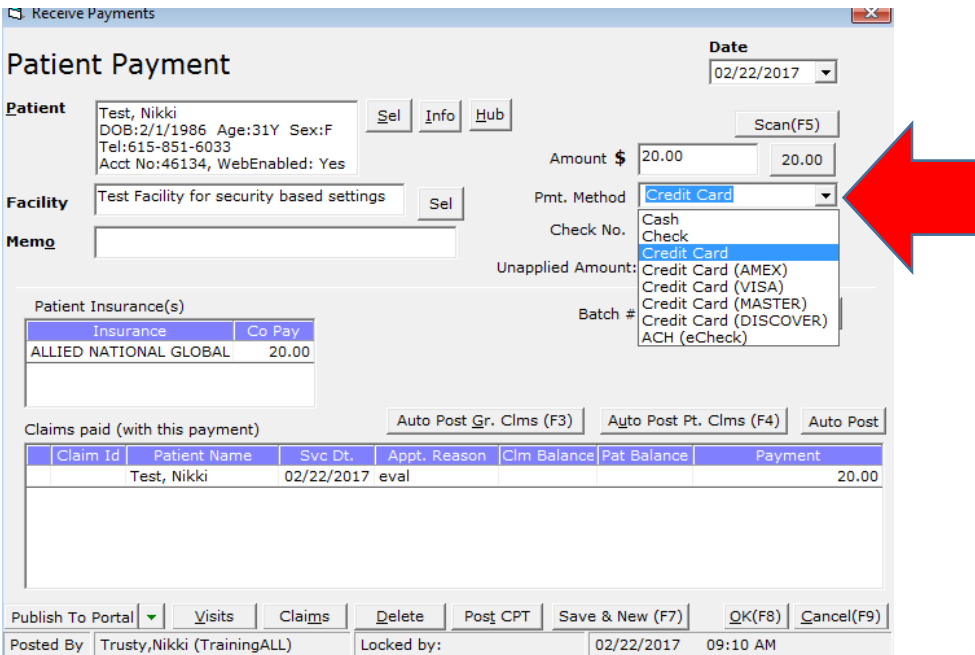
In the Patient Payment window that appears, enter the payment amount in the “Amount” field.

Note: In this example the patient’s insurance and copayment amount have already been added in the Insurance Information window. Therefore the user is prompted with the “20.00” button to easily reference and select the amount due from the patient.



The screenshot shows the 'Receive Payments' window with the 'Patient Payment' form. The 'Amount' field is set to '20.00' and has a '20.00' button next to it. A red arrow points to this button. The 'Date' is '02/22/2017'. The 'Patient' information is 'Test, Nikki' with DOB: 2/1/1986, Age: 31Y, Sex: F, Tel: 615-851-6033, and Acct No: 46134. The 'Facility' is 'Test Facility for security based settings'. The 'Payment Method' is 'Credit Card'. The 'Unapplied Amount' is '0.00'. The 'Patient Insurance(s)' table shows 'ALLIED NATIONAL GLOBAL' with a 'Co Pay' of '20.00'. The 'Claims paid (with this payment)' table has one row: 'Test, Nikki' on '02/22/2017' for 'eval' with a 'Payment' of '20.00'. The bottom of the window shows 'Posted By: Trusty, Nikki (TrainingALL)' and 'Locked by: 02/22/2017 09:10 AM'.

Choose the appropriate Payment Method from the drop-down list.



The screenshot shows the 'Receive Payments' window with the 'Patient Payment' form. The 'Payment Method' drop-down list is open, showing options: 'Credit Card', 'Cash', 'Check', 'Credit Card (AMEX)', 'Credit Card (VISA)', 'Credit Card (MASTER)', 'Credit Card (DISCOVER)', and 'ACH (eCheck)'. A red arrow points to this list. The 'Amount' field is '20.00' and the 'Date' is '02/22/2017'. The 'Patient' information is 'Test, Nikki' with DOB: 2/1/1986, Age: 31Y, Sex: F, Tel: 615-851-6033, and Acct No: 46134. The 'Facility' is 'Test Facility for security based settings'. The 'Unapplied Amount' is '0.00'. The 'Patient Insurance(s)' table shows 'ALLIED NATIONAL GLOBAL' with a 'Co Pay' of '20.00'. The 'Claims paid (with this payment)' table has one row: 'Test, Nikki' on '02/22/2017' for 'eval' with a 'Payment' of '20.00'. The bottom of the window shows 'Posted By: Trusty, Nikki (TrainingALL)' and 'Locked by: 02/22/2017 09:10 AM'.

Use the “Check No.” field to add any appropriate notes for your office and the billing team. Notes regarding each payment are crucial for proper communication between the practice and the billing team at PhyData. Common notes include:

Note/Abbreviation	Description	Additional Details
CP	Copay	Practices who bill for multiple services on the same DOS will specify which service to apply each copay to, such as office visits, physical therapy, ultrasounds, etc.
POA	Payment on Account	Typically also noted with date of service
SP	Self Pay	
PIF	Paid In Full	
CHK#	Check #	
CC	Credit Card	Typically also noted with cardholder name
MEDRE	Payment for Medical Records	
FMLA	Payment for FMLA Forms	
FRMFE	Payment for Form Fee	
COLL	Collections Payment	See our Turnover instructions for proper collections processing
PrePay	Prepayment for procedure or surgery	Documented with PIF and DOS if applicable
Product	Payment for product or supply item.	Offices who charge for products will note the specific product name for those payments.

In our example below we’ve indicated the payment was made from a credit card with the name “John Test”. Since the cardholder and patient are not the same, this note is important for the team at PhyData to match the payment to the charge(s).

The screenshot shows the 'Receive Payments' window with the following details:

- Patient Payment** window with **Date** 02/22/2017.
- Patient** information: Test, Nikki; DOB: 2/1/1986; Age: 31Y; Sex: F; Tel: 615-851-6033; Acct No: 46134, WebEnabled: Yes.
- Facility**: Test Facility for security based settings.
- Amount**: \$ 20.00.
- Pmt. Method**: Credit Card (VISA).
- Check No.**: CC John Test (highlighted by a red arrow).
- Unapplied Amount**: 0.00.
- Patient Insurance(s)** table:

Insurance	Co Pay
ALLIED NATIONAL GLOBAL	20.00
- Claims paid (with this payment)** table:

Claim Id	Patient Name	Svc Dt.	Appt. Reason	Clm Balance	Pat Balance	Payment
	Test, Nikki	02/22/2017	eval			20.00

Use the drop-down and "Print Receipt" to print a receipt for your patient.

Receive Payments

Patient Payment

Payment Id 123916 **Date** 02/22/2017

Patient Test, Nikki
DOB:2/1/1986 Age:31Y Sex:F
Tel:615-851-6033
Acct No:46134, WebEnabled: Yes

Facility Test Facility for security based settings

Memorandum

Amount \$ 20.00
Pmt. Method Credit Card (VISA)
Check No. CC John Test

Unapplied Amount:0.00

Batch # 0

Patient Insurance(s)

Insurance	Co Pay
ALLIED NATIONAL GLOBAL	20.00

Claims paid (with this payment)

Claim Id	Patient Name	Svc Dt.	Appt. Reason	Clim Balance	Pat Balance	Payment
0	Test, Nikki	02/22/2017	eval			20.00

Buttons: Publish To Portal, Print Receipt, View Payment Logs, Lock Payment, Print Billing Summary and Receipt, Delete, Post CPT, Save & New (F7), OK(F8), Cancel(F9)

02/22/2017 10:40 AM

Click OK at the bottom of the screen to save the payment.

Receive Payments

Patient Payment

Date 02/22/2017

Patient Test, Nikki
DOB:2/1/1986 Age:31Y Sex:F
Tel:615-851-6033
Acct No:46134, WebEnabled: Yes

Facility Test Facility for security based settings

Memorandum

Amount \$ 20.00 20.00
Pmt. Method Credit Card (VISA)
Check No. CC John Test

Unapplied Amount:0.00

Batch #

Patient Insurance(s)

Insurance	Co Pay
ALLIED NATIONAL GLOBAL	20.00

Claims paid (with this payment)

Claim Id	Patient Name	Svc Dt.	Appt. Reason	Clim Balance	Pat Balance	Payment
	Test, Nikki	02/22/2017	eval			20.00

Buttons: Publish To Portal, Visits, Claims, Delete, Post CPT, Save & New (F7), OK(F8), Cancel(F9)

Posted By: Trusty,Nikki (TrainingALL) Locked by: 02/22/2017 09:10 AM

The Appointment will now reflect the payment captured at the bottom left.

Appointment on Wednesday, February 22, 2017

Encounters Find Logs Referrals Orders Bubblesheet

Facility: Test Office:Test Facility for security based settings POS: 11

Date: 2/22/2017 Provider: AATest, Provider
Claim Providers Resource: AATest, Provider

Start Time: 8:00 AM End Time: 8:15 AM New Pt

Patient: Test, Nikki

DOB: 02/01/1986 Tel: 615-851-6033 E-mail: nikki.trusty@phydata.com

Visit Type: NP
Visit Status: PEN (Pending) Reason: eval
Diagnosis: Transition of care

Open Cases: N

Billing Notes:

General Notes:

Co-payment changes for this visit only

pay for this visit

available visit

[Payment Received 20.00](#)

Test, Nikki

02/22/2017 08:00 AM

Charges & Co-pay Detail

Total Charges	0.00
Allowed Fee	0.00
Co-Pay	20.00
Patient Portion	0.00
Patient Total	20.00
Patient Payments	20.00
Balance	0.00

Patient Account Summary

Account Balance	12.04
Patient Balance	40.00
UnPosted Payment	0.00

Insurance Eligibility

Not Verified [Check](#)

RX Eligibility

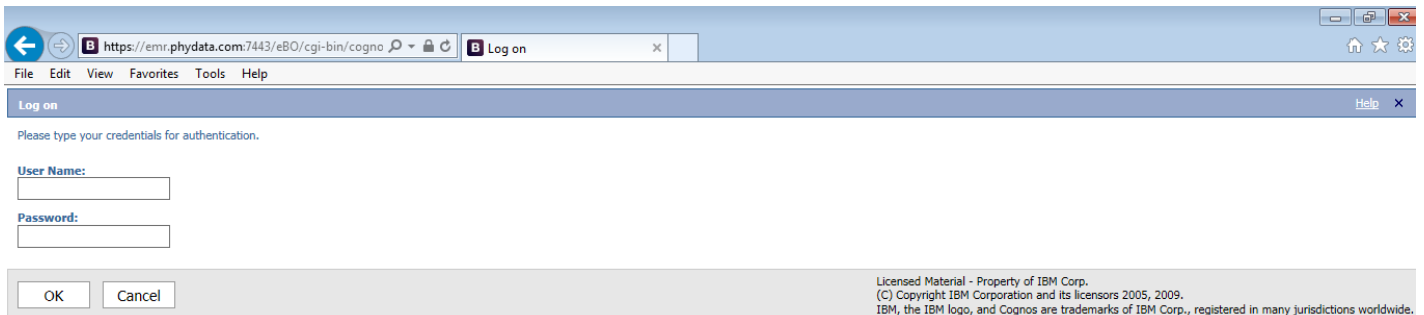
Nothing [Check](#)

Generating the Day Sheet/Payment Log:

At Go Live our team will set up the eBO Day Sheet as a favorite website inside Internet Explorer for any staff member who will typically need to generate the report. For access to this website please contact practice.management@phydata.com or 615-239-2048, Option 2.

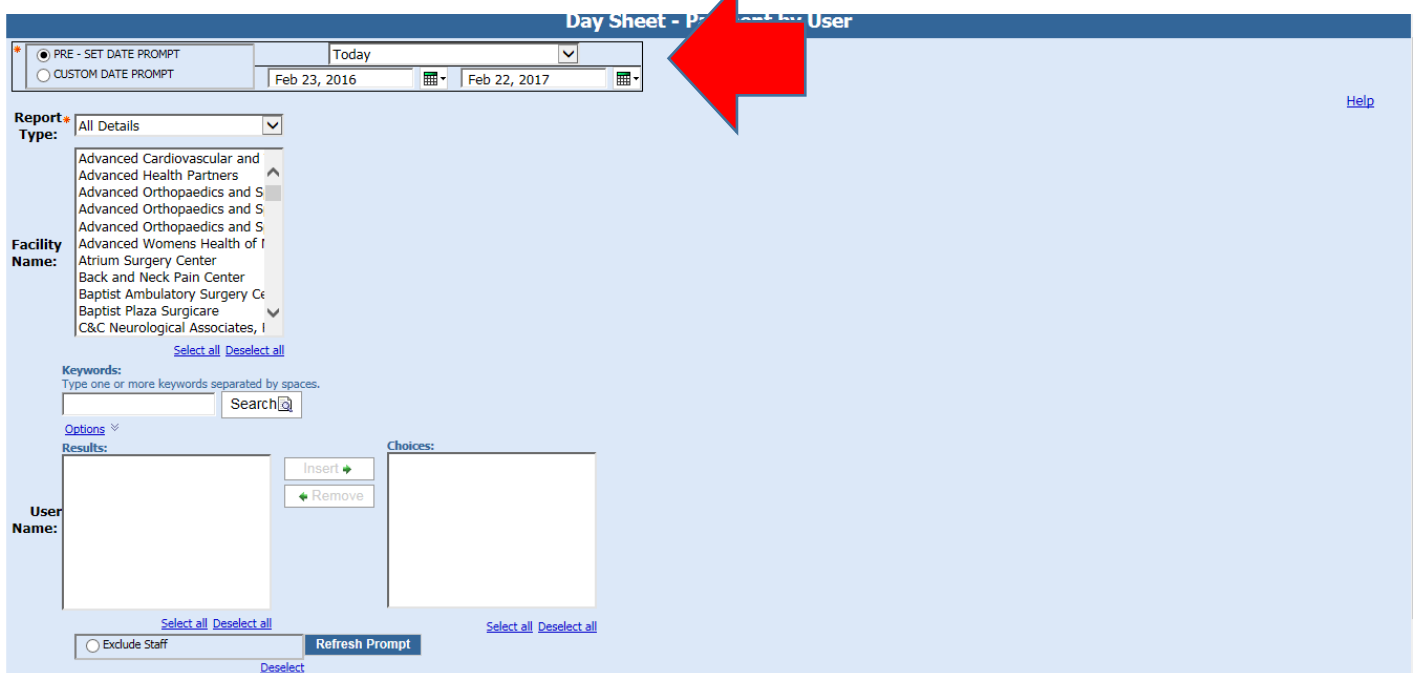
Open the website from Internet Explorer and login using your eClinicalWorks credentials.

https://emr.phydata.com:7443/eBO/cgi-bin/cognos.cgi?b_action=xts.run&m=portal/main.xts&startwel=yes&h_CAM_action=logonAs



The screenshot shows the Internet Explorer browser window with the URL https://emr.phydata.com:7443/eBO/cgi-bin/cognos.cgi?b_action=xts.run&m=portal/main.xts&startwel=yes&h_CAM_action=logonAs. The page title is "Log on". Below the title, there is a prompt: "Please type your credentials for authentication." There are two input fields: "User Name:" and "Password:". At the bottom left, there are "OK" and "Cancel" buttons. At the bottom right, there is a copyright notice: "Licensed Material - Property of IBM Corp. (C) Copyright IBM Corporation and its licensors 2005, 2009. IBM, the IBM logo, and Cognos are trademarks of IBM Corp., registered in many jurisdictions worldwide."

In the Day Sheet – Payments By User menu, select the appropriate date. If today, leave as is. If retrieving payments for a previous date, use the “Custom Date” option and choose the appropriate date range.



The screenshot shows the "Day Sheet - Payments By User" application interface. At the top, there is a date selection area with two radio buttons: "PRE - SET DATE PROMPT" (selected) and "CUSTOM DATE PROMPT". The "PRE - SET DATE PROMPT" is currently set to "Today". Below this, there are two calendar icons showing the date range from "Feb 23, 2016" to "Feb 22, 2017". A large red arrow points to the "Today" dropdown menu. Below the date selection, there is a "Report Type:" dropdown menu set to "All Details". Underneath is a list of facility names, including "Advanced Cardiovascular and Advanced Health Partners", "Advanced Orthopaedics and S...", "Advanced Orthopaedics and S...", "Advanced Orthopaedics and S...", "Advanced Womens Health of I...", "Atrium Surgery Center", "Back and Neck Pain Center", "Baptist Ambulatory Surgery Ce...", "Baptist Plaza Surgicare", and "C&C Neurological Associates, I...". There are "Select all" and "Deselect all" links below the list. Below the facility list is a "Keywords:" section with a text input field and a "Search" button. There are "Options" and "Results" sections. The "Results" section has a "User Name:" label and a large empty box. The "Choices" section has an "Insert" button and a "Remove" button. At the bottom, there is a "Refresh Prompt" button and a "Deselect" link. There are also "Select all" and "Deselect all" links for the results section.

Next highlight the facility name. Hold the Ctrl key to choose multiple facilities.

The screenshot shows the 'Day Sheet - Payment by User' interface. At the top, there are date selection options: 'PRE - SET DATE PROMPT' (selected) with a 'Today' dropdown, and 'CUSTOM DATE PROMPT' with date pickers for 'Feb 23, 2016' and 'Feb 22, 2017'. Below this is the 'Report Type' dropdown set to 'All Details'. The 'Facility Name' dropdown is open, showing a list of facilities including 'St. Thomas Surgicare', 'StoneCrest Medical Center', 'Summit Medical Center', 'Summit Surgery Center', 'Sumner Regional Medical Cent', 'Tennessee Spine and Joint Ce', 'Tennova Healthcare - Clarksvi', 'Tennova Healthcare - Lebanon', 'Test Facility for security based', 'The Bone & Joint - Dover', and 'The Bone & Joint - Dover HOP'. A large red arrow points to this list. Below the facility list are 'Keywords' and a 'Search' button. There are also 'Options' and 'Results' sections, and a 'User Name' field. At the bottom, there are 'Exclude Staff', 'Refresh Prompt', 'Deselect', 'OK', and 'Cancel' buttons.

To generate separate reports for each user, use the keyword search at the bottom of the screen to search and insert by User Name. Otherwise eClinicalWorks will generate a list of all payment for the date of service selected and divide by user. Click Ok to generate the report.

This screenshot is identical to the one above, showing the 'Day Sheet - Payment by User' interface. A red arrow points to the 'Keywords' search field, which is located below the facility list and above the 'Results' section. The rest of the interface, including the date prompts, report type, and facility list, remains the same.

Once the report has generated, staff can verify each payment listed against payments logged in Retriever and in their payments drawer. Payments will be divided by each username and then by payment type. Print the report and include in your daily payments bag to the courier.

Day Sheet - Payment By User

Facility: Test Facility for security based settings Entered by: ALL Date Range: Today

Trusty Nikki (TrainingALL)

Test Facility for security based settings

Payor Type	Payment ID	Payment Date	Payor	Check/CC #	Payment Type	Amount
Patient Payment	123916	Feb 22, 2017	Test, Nikki	CC John Test	Credit Card (VISA)	\$20.00
Credit Card (VISA)						\$20.00
Patient Payment						\$20.00
Test Facility for security based settings						\$20.00
Trusty Nikki (TrainingALL)						
						Credit Card (VISA) Total
Amount						\$20.00
						\$20.00
Summary						
						Credit Card (VISA) Total
Amount						\$20.00
						\$20.00

Q: What if a payment I logged is not reflected on this report?

A: Open the patient appointment window from the Resource Schedule and verify the payment appears at the bottom left of the screen. Also verify the scheduled facility matches your report.

Q: How do I view previously logged payments?

A: Users can generate the eBO Day Sheet for all previous dates of service. Users can also access a log of individual patient payments by opening the Patient HUB, selecting Account Inquiry in the bottom section of the window and then "Patient Payments".

Q: How do I delete a payment that was logged incorrectly or was otherwise refunded to the patient?

Contact our team at practice.management@phydata.com or 615-239-2048, Option 2 for assistance.