



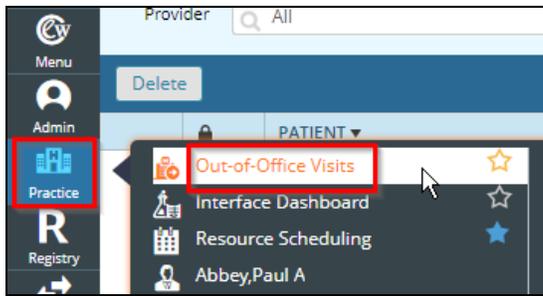
JOB AID

Collecting Payment for Non-Visit Charges

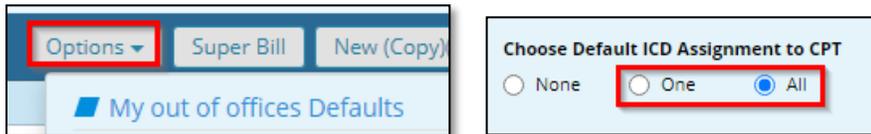
Summary: This Job Aid will give step by step instructions when payments are collected for non-visit charges for medical records, forms, letters, over-the-counter products, etc. All payments collected must be posted to the patient's account and applied to a visit, a future visit, an out of office encounter, or a claim with a past due balance. Non-Visit charges are created with an Out of Office Encounter.

Out of Office Encounter

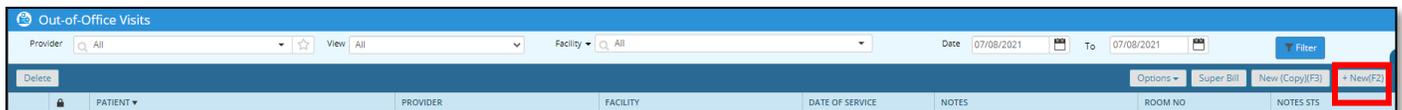
Step 1. Path: Practice – Out of Office Visits



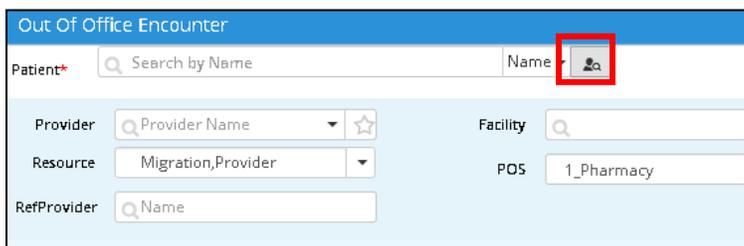
Step 2. First time use only: Click the drop-down arrow on the Options tab to select the default settings. For Choose Default ICD Assignment to CPT, select One or All to automatically assign the ICD codes to the CPT code when it is added. If None is selected, the ICD codes must be manually assigned to the CPT code. If already completed, proceed to **Step 3**.



Step 3. Click the New tab.



Step 4. Click the Patient Lookup tab to search for and select the patient using a 2-factor search method.





Step 5. Enter the name of the provider associated with these charges in both the Provider and Resource fields.

Step 6. Facility – Enter practice initials followed by 11 (AHP11) and select specific location where the payment was collected.

Step 7. Service Date – This date will default to the current date of service and will not need to be changed unless payment has been collected on a previous date and not posted.

Step 8. Click the Prev Dx tab and select an appropriate diagnosis code associated with these charges.

Step 9. Click the Add tab to select the CPT Code(s). Search for the desired CPT code and click Ok. NOTE: A list of common fake codes is below or refer to a list of practice specific fake codes.

- DEPO1 – Deposition
- MEDRE – Medical Records for pages 1-5.
- MEDAP – Medical Records for pages 6 and up. Enter the exact number of additional pages in the Units field.
- FRMFE – Form Fee
- FMLA1 – FMLA Form Fee
- LETER – Letter Fee

Step 10. Click the Claim Data tab and check the box for Bill To Patient. NOTE: If the patient does NOT have insurance and is marked as Self Pay in the demographics, skip to **Step 11.**

Step 11. Click Lock tab. NOTE: A claim will not be created if the encounter is not complete and locked.

Step 12. Click the OK tab.

Out Of Office Encounter

Zztest, Sara, KEEP 52 Yrs, female 04/06/1971 615-888-9999 3024 BUSINESS PARK CIR, GOODLETTSVILLE TN-37072-3132 sara.robison@ouradvancedhealth.com Hub Info Yes

Provider: Cheeks, Jimmy W (5) Resource: Cheeks, Jimmy W (5) Facility: CHK11 - Ch... Family C... (6) Service Date: 02/01/2024 (7) POS: 11_OFFICE Room No. Admission Dates: 02/01/2024 Discharge Date: 02/01/2024

ICD Codes [F9] (8) Auto map to ICD10 Prev Dx Add

P	Code	Name	Specify	Risk	Onset Date	Notes
1	R53.82	Chronic fatigue				

CPT/HCPCS Codes [F10] (9) Add Update

Code	Description	Units	M1	M2	M3	ICD1	ICD2	ICD3	ICD4	Start Date	End Date
MEDRE	Medical Records	1				1 R53.82				02/01/2024	02/01/2024
MEDAP	Med Rec Add'l Pages	25				1 R53.82				02/01/2024	02/01/2024

View Claim Claim Data Options (10) Lock (11) Save & New Save & Copy OK (12) Cancel



TIP: Do NOT click the View Claim tab. This will prompt you to manually create a claim. Claims are automatically created through a PM scheduled task.

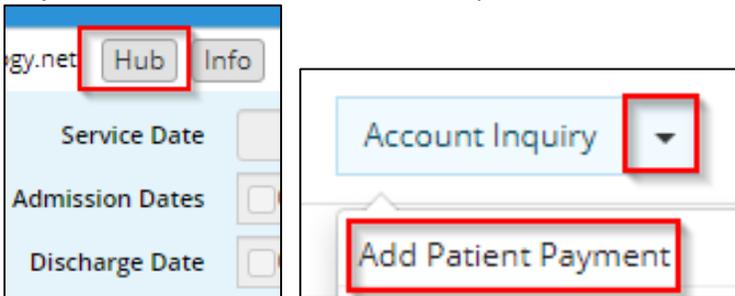


Add Patient Payment.

Step 1. Click on the patient's name to reopen the Out of Office Encounter just created.



Step 2. Click the Hub tab. Click the drop-down arrow on the Account Inquiry tab and select Add Patient Payment.



Step 3. Enter the payment amount.

Step 4. Select the Payment Method.

Step 5. Enter the check number or credit card authorization number.

Step 6. Enter note describing reason for payment.

Step 7. Verify Facility reflects the location where payment was collected.

Step 8. The Svc Dt will reflect the DOS for the Out of Office Encounter just created. Enter the payment collected in the Payment field.

Step 9. Click the OK tab.



Receive Payments ZZTEST, Sara "Beth" KEEP Apr 6, 1971 (52 yo F) Acc No. AH177716

Patient Payment

Guarantor: Zztest, Sara, KEEP
 DOB: 04/06/1971 Age: 52Y Sex: F
 Tel: 615-888-9999, Acct No: AH177716
 WebEnabled: Yes

Batch No: 0 Date: 02/01/2024
 Deposit Date: MM/DD/YYYY Amount: \$ 25.00 15.00 Scan(F5)
 Pmt. Method: Credit Card (VISA)
 Check No.: 123456
 Unapplied Amount: 0.00

Facility: Advanced Diagnostic Ima
 Memo: Reason for Payment

Patient Insurance (s)
 Insurance: BCBS 1 NETWORK P AETNA CIGNA HEALTHCARE WC AMERICAN CASUALTY CO...
 Co Pay: 15.00

Claims Paid (with this payment)
Auto Post Gr. Clms (F3) Auto Post Pt. Clms (F4) Auto Post

Claim Id	Patient Name	Svc Dt.	Appt. Reason	Clm Balance	Pat Balance	Payment
	Zztest, Sara, KEEP	02/01/2024				25.00

Posted By: Robinson, Sara (Training All) Locked By: Date & Time: 2/1/2024, 3:37:26 PM

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