Patient Payment System User Guide

WebPT's Patient Payment System streamlines the payment collection process for copayments and coinsurances as well as wellness product and therapy supply sales. It also allows you to record patient deductibles. The Patient Payment System is available to all WebPT Members, including those who do not have the Front Office Package.

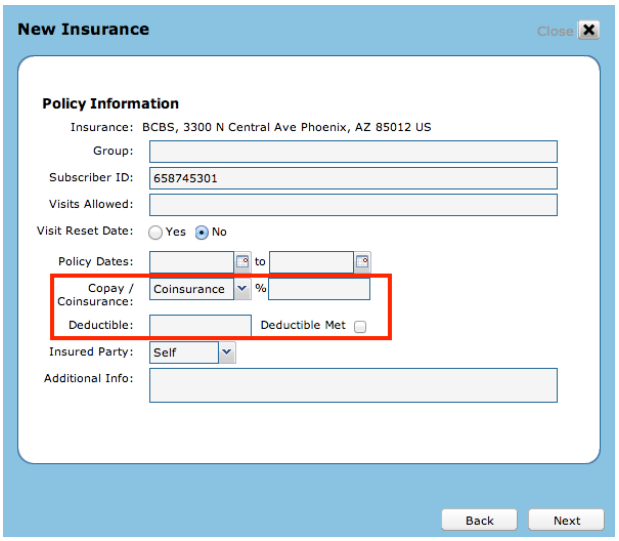
This new system:

- Allows you to track more than just copays. You also can record coinsurances, deductibles, and—if you sell supplies to your patients—purchase amounts.
- Carries your charges over to the Scheduler (if you use it). For example, if a patient decides to pay his or her copay on the next visit, the amount due will automatically carry forward to the patient's next appointment.
- Creates a payment log for each individual patient case. This allows you to see current balances, and you can print a full history for a particular case if necessary.
- Provides valuable business insight with a new report called the Payment Log. This report allows administrators to see how much money the clinic has collected, along with any outstanding balances.

There are three main areas of WebPT that involve the new Patient Payment System. This user guide provides an overview of each one.

Recording a Patient's Copay, Coinsurance, and Deductible

You'll add a patient's copay, coinsurance, or deductible amount to his or her record under the New Insurance screen, which has spots for copay/coinsurance and deductible. If you use our Front Office Package, these amounts will automatically transfer to patient appointments.

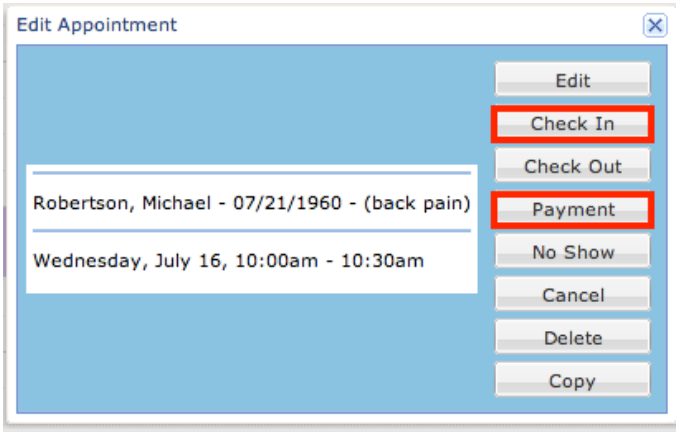


Now, let's examine how the Patient Payment System works for Front Office Package users. If you don't have the Front Office Package, skip to section 2.

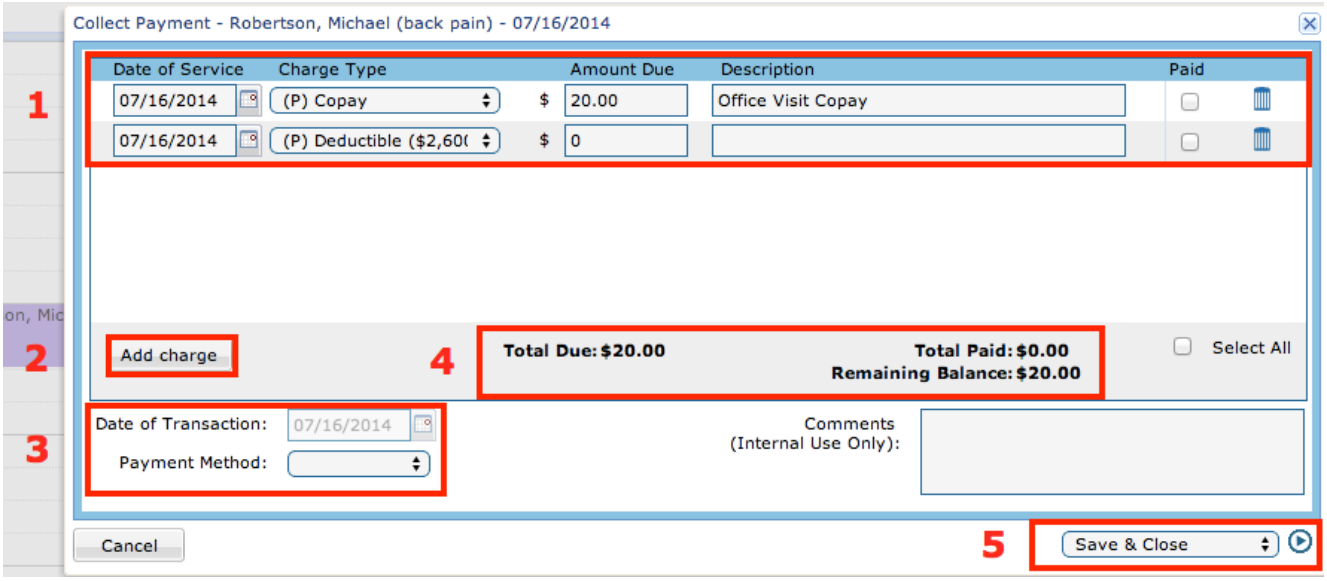
1) Front Office Package Integration

Collecting Payments

There are two ways to collect payment when a patient arrives for a scheduled appointment. If the patient is checking in, simply click "Check In" and the payment window will appear. If you're not ready to check in the patient, or if you decide to collect payment when the patient checks out, click the Payment button.



The payment screen will then appear, as shown in the example below.

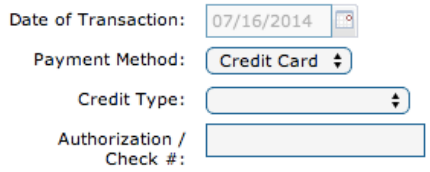


On the next page are descriptions of the numbered items shown denoted in the above screenshot.

1. This section displays each item that requires payment:
    a. **Date of Service**: Refers to the date payment is due. This differs from the Date of Transaction, as we explain under number three below.
    b. **Charge Type**: Specifies the category of payment. Options include copay, deductible, coinsurance, supplies, wellness, and other.
    c. **Amount Due:** Displays the amount of money that your clinic still needs to collect.
    d. **Description:** Provides a free-form text field to enter a description of each payment.
    e. **Paid**: When checked, designates that the patient is paying for the item at this time.
    f. **Trash Icon:** Removes the charge.

2. The **Add Charge** button allows you to record an additional payment from a patient (for therapy supplies, for example).

3. The **Payment Method** area allows you to enter the payment method used for the transaction (e.g., cash, debit, credit, HSA, or check). The **Date of Transaction** field records the date of payment. Please note that you cannot modify this date because it's the date on which you actually collect payment.



4. This section displays the total amount due, the amount paid, and any remaining balance that the patient owes.

5. After collecting payment, use the dropdown menu to save the transaction and either close the screen, print a receipt, or print a full payment history for that patient's case.

Note: Payments collected at the front desk and recorded in the Scheduler will automatically appear within the patient record screen as well.

2) Patient Payments on the Patient Record Screen

You can collect patient payments within the patient record screen. Note that each case has its own payment log, and if a patient has multiple cases, the payments will apply to the case in which you are currently working.

The image below is an example of what the Payment Log will look like on the patient record screen.

Patient: Robertson, Michael

- Patient Info
- Records
- Flowsheet
- Home Exercise Program
- eDoc
- Chart Notes
- Upcoming Appointments
- Previous Appointments
- Patient Payments

DOB:	07/21/1960
Age:	53
Assigned Therapist:	Grumpy Cat
Physician:	D. Oz, MD (1234567893)
Insurance:	BCBS
Diagnosis:	ICD9: 724.01: Spinal stenosis, thoracic region
Address:	310 Main Street Frankenmuth, MI 48734
Phone:	(989) 652-0000
Total Visits	0
Cancel/No Show:	0
Additional Info:	

Patient Payments (back pain)

Print History PDF Export to Excel

Date of Service	Date of Transaction	Payment Type	Description	Amount Due	Amount Paid	Paid Method	Credit Type	Auth / Check #
07/16/2014	07/16/2014	Copay	Office Visit Copay	$20.00	$20.00	Credit Card	Visa	

Add Payment

Total Charge: $20.00
Total Paid: $20.00
Balance: $0.00

To add a payment, click the Add Payment button. You'll see a payment screen similar to the one shown on page 2 of this user guide. To download a patient's transaction history, click "Print History PDF" or "Export to Excel."

3) Clinic Payment Log

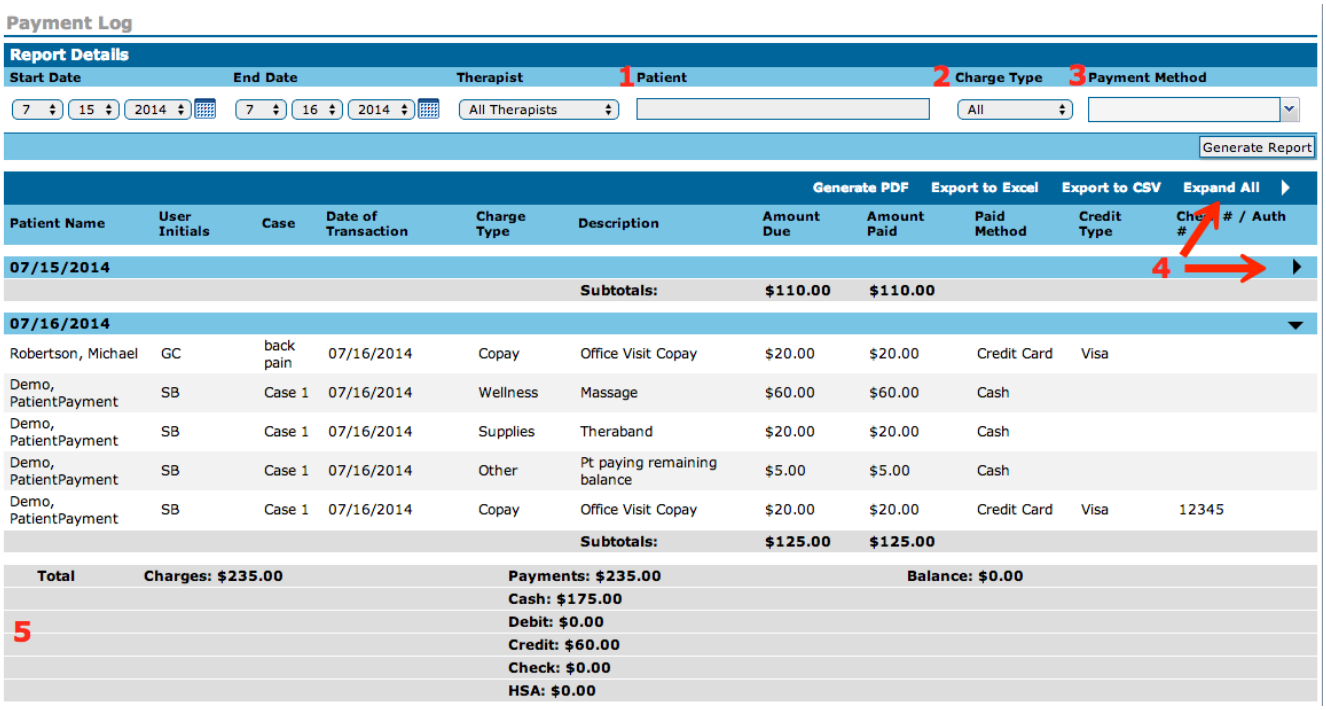
The final component of the Patient Payment System is the Payment Log, which displays all of the payments a clinic has received, thus allowing clinic administrators to:

- Determine how much money the clinic collected over a specific time period as well as any outstanding balances.
- Create a copay log to track the copays that the clinic has collected as well as those still outstanding. (This is helpful for clinics with integrated billing.)
- Export the log as a CSV file directly from WebPT to a billing system.

To access this feature, click "Payment Log," which is located in the Reports section on the left side of the WebPT Dashboard.

Reports

- Prescription Report
- Referral Report
- Lost Patient Log
- Billing Report
- Payment Log
- MPA Report
- Plan of Care Report
- Medicare Cap Report
- Productivity Report
- Missed Notes Report
- FL Report
- Claims Feed Report



To use the Payment Log, you'll first need to determine your search criteria. You can sort by patient, date range, or therapist. After selecting your filters, click "Generate Report" to view the data. Below are descriptions of the numbered items shown detailed in the screenshot above.

1. **Patient**: If you'd like to run the Payment Log for a specific patient, type the patient's name here.

2. **Charge Type**: Use to select the type of charge you want to see. Options include copay, deductible, coinsurance, supplies, wellness, and other. For example, if you'd like to create a copay report, choose the copay option.

3. **Payment Method**: Use to view the payment amounts you've collected, organized by method (e.g., cash, debit, credit, HSA, and check).

4. **Arrow icons**: These allow you to expand the data you see to include every payment that the clinic has collected for the selected date.

5. **Totals:** At the bottom of the Payment Log, you'll see grand totals. These figures include total charges and total payments received as well as a breakdown of how the clinic received those payments. You'll also see the total outstanding balance that the clinic needs to collect.

Frequently Asked Questions

Q: Does the Patient Payment System integrate with my billing system?

A: No, at this time the Patient Payment System does not integrate with any billing system. It does, however, provide more options for payments as well as a report to help minimize errors.

Q: Why was the copay amount removed from the Dashboard?

A: We removed the copay from the Dashboard because of the depth of new functionality added to patient payments. Instead of using the agenda to reconcile your copays, you can now use the Payment Log, which serves as a single point of reference for all patient payments.