Appointment Manager

Centricity® Business 4.3

MSU HealthTeam Training and Education (M-F 8a – 5p)
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Overview

Front Desk is functionality within the scheduling application where

- Provider’s or a clinic’s daily appointment list is viewed
- Patients are checked in
- Patients are checked out
- Follow-up appointments are made
- Money collected is posted

The Appointment Manager functionality provides a unified workflow that reflects the sequences of activities associated with a patient visit. It also provides accountability for the money collected through balancing a cash drawer with a daily cash batch that reflects all payment activity posted to the system within that batch.

Objectives:

Upon completion of the skills verification review students will be able to demonstrate the following:

1. Accurately post payments using the correct payment options.
2. Balance the actual cash drawer to the amounts posted into Centricity Business.
3. Reprint a receipt.
4. Delete transactions posted in error.
5. Balance a batch and print a batch proof.
6. Complete the appropriate batch documentation.
7. Recover a batch
8. Identify appropriate invoices for payment posting
9. Locate payment arrangements
10. View Financial Comments
11. Navigate the Appt. Overview Screen
12. Demonstrate an understanding of the Cashier Policy
Workflow

Patient Presents For An Appointment

1. Click on Appointment Manager on VTB
2. Highlight the patient’s name and check picture ID
3. Click on Appt Overview
4. Verify demographics and insurance
5. Verify patient’s account balance
6. Click on the Check-In button (Check-Out if collecting money at time of exit) If not collecting money click on Arrive button
7. Post any co-pays or self pay payment on account on the Check In screen that appears.

Patient Appointment Completed
Payments can be collected at this time through Check-Out if not collected at time of arrival.

A Follow-up appt is scheduled by clicking on the Action Button

When delinquent charges or payments for invoices in an insurance FSC are collected, post through payment on account on VTB

1. Front Desk Staff balances their own Cash Batch to their Cash Drawer at end of day.
2. Batch Proof Printed and Hard Copy Batch created prior to submitting to the Head Cashier.
3. A deposit slip is prepared according to standard procedures by Head Cashier.

SEE FRONT DESK CASHIER POLICY
Appointment Manager

Arriving a patient that presents for their appointment at Front Desk.

Highlight the line with the Patient name being arrived (or checking out). Do not click on the actual name or time as these are hyperlinks.

Click on the Appt Overview button. You will be taken to the Appointment Overview Screen.
APPOINTMENT OVERVIEW SCREEN

- Demographic and insurance registration is updated if patient has not been seen in 30 days or if information has changed.
- Outstanding Account balances are checked.
- Cash batches are opened or accessed if already open in order to post payments

Verify and update demographics and insurance by clicking on the demographic and insurance hyperlinks

Click on Statement Balance to verify any outstanding balances patient owes and collect those balances

Click on Check-In if collecting payment upon arrival (the patient will automatically be arrived), or Check-Out to post Payments when the patient leaves. If no money is collected at check in, click on Arrive
Collecting Payments

When a co-payment, or a time of service payment is posted through Front Desk an invoice is created, which starts the billing process for services on that date. The scheduled appointment information is tied to the payment, and the services rendered to the patient are added at a later time. Payments on account are also posted through Front Desk by selecting the appropriate invoice on account and posting the payment with the appropriate pay code and payment type.

Cash Batch

A cash batch is opened at the beginning of your shift for the day, is balanced against your cash drawer and closed at the end of your last shift of the day.

To open a new cash batch enter “G” in Batch Field. Add Clinic Name to description and click OK (always check to see if you have a batch open before generating a new batch).

If you have already opened a cash batch for the day it will display in the batch field. Press tab and then click okay (box to right of field allows you to check for a open batch or batches.).
Posting Payment on Today’s Visit (Co-pay or Fee-For-Service)

1. “G” generates an invoice
2. Enter billing area if not defaulted
3. Enter Payment Type: Cash, Check or credit card
4. Enter Paycode, Payment $, Invoice payment Amount
5. Receipt will default. Always print a patient receipt
6. Click Ok when ready to file.

Enter Comment in the following format
CASH: CASH
CREDIT CARD: CARD Type followed by #
CHECK: CK # 34332
Posting Payment to Previous Self Pay Balances at Time of the Visit When No Co-pay or Charge is Due For Today’s Visit

Click on Check In or Check Out on the Patient Overview Screen. Open batch.

Other payment scenarios include:
Co-pay for previous visit that is still in an insurance fsc – enter the previous visit’s invoice number in the invoice field (can use drop down list to select the invoice). The paycode is 725 and the payment and invoice amount will be the co-pay amount in both fields. (When using Pay code 725, posting must be done one invoice at a time).

Pay code 30 and 36 is used for delinquent accounts – See attached addendum and use payment on account from Blue Vertical Tool BAR. (When using Pay code 30 or 36, posting must be done one invoice at a time)
Posting a Payment to a Self Pay Balance on Account
Patient Has No Appointment on the Date of Payment

This is done through “Payment on Account” on the Vertical Tool B
Access the batch you have opened for the day.

1. Enter Patient Name at Patient Field and hit Tab
2. Clear “G”. Using Drop down list display invoices, click on oldest self pay invoice
3. Enter Payment Type Cash, Check or Credit Card
4. Enter Pay code 711 and Payment $$ (unless account is delinquent) – see below

Enter invoice $$ balance for the invoice you selected and enter comment for type of payment
Print Receipt defaults, Click OK

NOTE: The $$ difference between the invoice you selected and the amount of payment collected will auto post to the next oldest self pay balance and up to the most current self pay balance invoice until it has posted the entire payment amount.

Delinquent Accounts - CLS, PCAP, UCL, UCD, and UCO must be posted separately through VTB “Payment On Account”. Pay-code 711 will not post to these invoices. Pay-code 30 will post to CLS and PCAP. Pay-code 36 will post to UCL, UCD and UCO.
Balancing The Cash Batch

To access this screen click on Cash Drawer located on Horizontal Tool Bar.

Separate drawer contents (cash, check, credit card). Total each payment type. Complete batch control fields with either zero or the $ amount for that payment type in your cash drawer. Complete all nine fields.

Choose Yes on Controls OK fields. Balance to “Actual” batch amount.

At Action enter:
- L to print Batch Proof,
- D to delete transactions.
- X to exit batch after balancing.
- T to temporarily exit batch.

Red indicates out of balance.

Click on Show Payment Detail Form to access Payment Detail Options. Select cash list. Print cash list for batch. If more than 14 see page for printing instructions.

NOTE: If you click in the unit fields you will need to balance the unit amounts as well as dollar amount.
## Batch Entry Action Codes

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
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<tr>
<td>A</td>
<td>Add/Edit Registration</td>
</tr>
<tr>
<td>D</td>
<td>Delete Transactions</td>
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<tr>
<td>X</td>
<td>Exit Batch</td>
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<tr>
<td>F</td>
<td>Financial Comments</td>
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<td>G</td>
<td>General Comments</td>
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<td>Q</td>
<td>Inquiry</td>
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<tr>
<td>L</td>
<td>Print Batch Proof</td>
</tr>
<tr>
<td>T</td>
<td>Temporarily Exit Batch</td>
</tr>
</tbody>
</table>
Deleting A Payment

Examples when a payment must be deleted

- The payment is posted to the wrong patient’s account
- The payment is posted to the wrong invoice
- The payment is posted with the wrong payment type (cash, check or credit card)
- The payment is posted with the wrong pay code
- The payment is posted with the wrong dollar amount

Access the Cash Drawer Batch from Horizontal Tool Bar

Enter “D” In Action Field to Delete Transactions and press OK.
Deleting A Payment - continued

Enter patient name using standard look up command or enter appt number proceeded by a V.

Click on drop down box and select invoice from list.

Check the Delete all box and click OK. The payment will be deleted. If multiple payments click on line to delete if not deleting all.

Repost the correct payment
Complete a variance report to document the reason for the deletion.
Recovering A Batch

A batch can “crash” and become unavailable as you try to access it. If this occurs you will need to recover your batch.

Click on Horizontal Tool Bar “Batch Recovery” Tab

Enter batch number at Recover batch number prompt. Press Tab

After batch is recovered click on the VTB or Horizontal tool bar Tab to move out of Recover Batch.