



## Check out process

**For the check out module to work you will need to enter eligibility and benefits under the patient's insurance profile**

- Click on the insurance profile
- Click on check eligibility
- Once the PDF report comes in and there is a green checkmark next to the insurance name you can then click on elig/benefits
- Once you click on elig/ benefits
- Click add new

Patients > Rusty Test

Summary Demographics Insurance Profile Financials Encounters Claims Statements Documents To-Do's Notes and Alerts ▲

Care Team

**Insurance Profile** Add New Insurance

BCBS CO (Anthem) (Formerly BS020) [aka ANTHEM BLUE CROSS BLUE SHIELD (COLORADO)] (SB550)  
2238 Matrix Lane, Naples, FLORIDA 34112

Elg/Benefits Authorizations

**Insurance Profile Note**

**Insurance History**

Check Eligibility ▼

- Use the drop-down to enter (Deductible, co-pay, co-insurance, out of pocket)
- Click save

Policy Benefits for BCBS CO (Anthem) (Formerly BS020) [aka ANTHEM BLUE CROSS BLUE SHIELD (COLORADO)] (SB550)

Deductible Remaining \$0.00

Co-Insurance 0%

Co-Pay \$0.00

Out of Pocket Remaining \$0.00

Co-Pay Applies to Out of Pocket

Co-Pay Applies to Procedures

Cancel Save

### Check out screen

- Click check out on the left-hand side of the screen
- You are now able to see all patients that are scheduled for the practice along with all providers
- You can filter this from the top right side of the screen by the provider
- You can view patient information from this screen

Check Out		ADCI Clinic	Providers
1	 <b>Stephany Jimenez (F   32)</b> ▲ STTE0007   Nov 20, 1987 08:15 AM   03:28:03	Other (test) With Provider - Waiting Room <b>Stephany Restrepo, MD</b>	
2	 <b>Troy Barnes (M   30)</b> ▲ TRBA0000   May 12, 1990 08:45 AM   05:36:16	Rash With Provider - Waiting Room <b>Matija Cupac, MD</b>	
3	 <b>Barry Allen (M   35)</b> ▲ BAAL0000   Jun 07, 1985 09:00 AM   05:36:07	Acne (Follow Up) Ready for Staff - Waiting Room <b>Matija Cupac, MD</b>	
4	 <b>Stephany Jimenez (F   32)</b> ▲ STTE0007   Nov 20, 1987 09:15 AM   06:58:36	Other (test) With Provider - Waiting Room <b>Stephany Restrepo, MD</b>	
5	 <b>Wanda James (F   31)</b> ▲ WAJA0003   Sep 29, 1988 10:00 AM   04:35:53	Suspicious Skin Lesion With Provider - Waiting Room <b>Francisco Kerdel, M.D.</b>	
6	 <b>Vincent Casale (M   20)</b> ▲ VICA0000   Nov 29, 1999 01:00 PM   01:44:43	Suspicious Skin Lesion With Provider - Waiting Room <b>Francisco Kerdel, M.D.</b>	

- If you click on the patient you can view 2 categories cart and follow up

**Cart** Follow Up

Patient Balance: \$4,033.56

| May 27, 2020 - \$100.00

| May 28, 2020 - \$50.00

| Jun 01, 2020 - \$45.00

| Jun 01, 2020 - \$45.00

| Jun 05, 2020 - \$3,187.56

| Jul 10, 2020 - \$356.00

| Jul 20, 2020 - \$250.00

- Hovering over the patient's name you can see the appt card (important to review to verify SELF PAY patients)

**Cart** Follow Up

Patient Balance: \$4,033.56 ←

| May 27, 2020 - \$100.00

| May 28, 2020 - \$50.00

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Medical Charges: \$0.00 ← [Edit](#)

*\* Estimated costs*

99211 (1 Unit) - \$0.00

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Items ← [Add](#)

*No Items In Shopping Cart*

**There are 3 major sections:**

Patient balance- all patients past balances that are pending insurance/ or patient may owe

- Can hover over the patient's amount to see more info, can click into the claim

11506 ←  
 Date: 05/27/2020  
 Clinic: ADCI Clinic  
 Billed: \$100.00  
 Balance: \$100.00  
 Type: Items

**Medical charges & items-** are related to today's encounter which are estimated cost for the appointment for today.

### Medical Charges

- hovering over offers more information like the cost estimator

**Medical Charges:** 99211 (1 Unit) - Established patient visit: Level 1  
*\* Estimated costs*  
 99211 (1 Unit) - **\$24.47**

**Items**  
*No Items In Shopping Ca*

99211 (1 Unit) - Established patient visit: Level 1  
 Billed: \$34.00  
 Contracted: \$24.47  
 MSRR: \$24.47  
 Co-Pay: \$24.47  
 Deductible: \$0.00  
 Co-Insurance: \$0.00  
 Other: \$0.00  
 Total: \$24.47

- You can edit the medical charges section (delete, add or make changes to CPT codes) This will ONLY affect the estimated cost, not the encounter itself.
- Click on edit then click on add new procedure to add a new CPT code. Or click into the current CPT code to change the procedure code.

**Medical Charges** [Add Procedure](#)

*\* Changes on this page will affect only estimated costs and not the encounter itself*

Charges	Modifiers	Diagnoses	Units	
99211 <span style="float: right;">x</span>	Select...	Select...	1	x

Cancel Save

**Items will show everything the clinical staff has ordered for the patient in the exam.**

- These are items that can be bought in office or cosmetic charges
- You can add an item by clicking add
- This will bring you to the financials screen where you add items, once you post the item it will bring you back to the check out screen and add the information.

### General information- details about insurance profile

- Click the drop-down arrow to see insurance profile information

General Information <span>📄</span>	
Date of Service	08/04/2020
Attending Provider	Stephany Restrepo, MD
Billing Provider	Stephany Restrepo, MD
Insurance Profile	United Ball
Contracted Fee Schedule	Medicare 150%
Unapplied Patient Payments	\$648.62
Draft Refunds	\$22.00
Deductible Remaining	\$0.00
Co-Pay	\$0.00
Co-Insurance	20%
Out of Pocket	\$0.00
Co-Pay Applies to Procedures	No
Co-Pay Applies to Out of Pocket	No

- can edit this screen, change the fee schedule (very important to double-check that the fee schedule is correct)
- Click edit to view general information and change fee schedule

**General Information**

<b>Insurance Profile</b>	<b>Deductible Remaining</b>
[Commercial Insurance Co.] United Ball ...	\$0.00
<b>Contracted Fee Schedule</b>	<b>Co-Insurance</b>
Medicare 150% x	20%
	<b>Co-Pay</b>
	\$0.00
<b>Out of Pocket Remaining</b>	
\$0.00	
<b>Co-Pay Applies to Procedures</b>	
No	
<b>Co-Pay Applies to Out of Pocket</b>	
No	

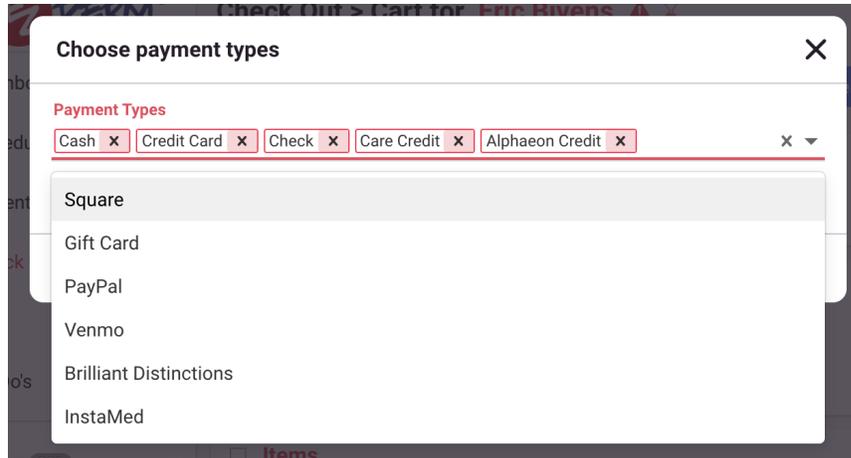
\*You can exclude items, balances, or medical charges by deselecting the boxes next to the name.

### Collecting payment new update

**You now have the option for multiple forms of payment in the check out module.**

Click payment options to select the payment methods your clinic accepts. For example:

- Cash, credit card, Square, check, care credit, gift card, paypal, Venmo, instamed, Alphaeon Credit, and Brilliant distinctions.



- Once you select the payment methods you have the option to click **apply to this transaction only** or **save as default settings**

Apply to This Transaction Only

Save as Default Settings

### When you are ready to collect payment

- You can now add any amount to collect for patients. You will get a warning message that will ask you “the amount from all payments exceeds the total amount. Would you like to proceed?” click ok to bypass
- You have the option to split payments by different payment methods
- Once you click pay You will get a short banner telling you patient payment was collected.
- Money will auto distribute after clicking pay
- Available funds will increase if not linked to an item, medical charge, they will stay in the unapplied section of the patients financials.
- If you click details it will bring you to the patient's payment page.
- Automatically everything will carry down for you. You have your item and also the charges that are linked with the office visit.
- This will automatically distribute the payment for the item for you and it will leave the unapplied amount for patients copay
- To print a receipt you will need to go into the patient's financials and into the patient payment.
- You can see the information on the item purchased on the receipt along with payment information. But it will not show you CPT codes as the encounter has not been signed off.

**Cash** Details ▲

Amount \$0.00

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[Pay](#)

 **Square** ▲

Amount \$0.00

Terminal Terminal 1 x ▼

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[Pay](#)

**Check** Details ▲

Amount \$0.00

Check Date 12 Reference Number

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[Pay](#)

## Follow up

- Check the follow-up tab to verify if they need to schedule a f/u
- If they do you will click on the appropriate follow-up appointment

Cart Follow Up

**Thursday, February 04, 2021**

Actinic keratosis

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**No Follow Up Requested**

Hemangioma (Trunk Waist Up)

[Upcoming Appointments \(2\) ▼](#)
[Schedule for Thursday, February 04, 2021](#)

- Click on the date then click on schedule appt
- You can filter the dates on the top if needed and the pop up will stay and you will need to drag and drop into the appt time you want

**The last step is you will hover over the patient's name and click check out.**

- That will then remove them from your check out cart