

Collecting Co-Payments

Ideally, co-payments should be collected as part of the check-in or check-out workflows. If for some reason that is not possible, you can collect the co-payment in using the payment collection workflow but be sure that you are posting the payment to the co-pay in the visit section.

How it Works



Collecting co-payments during check-in

1. When the payment collection window displays, the co-pay should default. If it doesn't, follow the steps below for updating benefit information.
2. Click **Collect Payment**.

The screenshot displays the Epic payment collection interface. At the top, a header bar shows the visit details: "Check In - Office Visit on 1/10/22 at 10:15 AM with Drew-Cad Ant in BMG Int Med for 15 minutes". Below this, a sidebar on the left lists navigation options: "OFFICE VISIT", "Demographics", "Payments" (selected), "Options", "Recalls", and "Clinical Information". The main content area is divided into sections. The "This Visit" section shows a "Today - Office Visit" entry for "Antwerp, Drew-CAD (Bridgewater Medical Group Internal Med)" with a "Copay" of "25.00". A "Collecting" status box is visible next to the copay amount. Below this, the "Previous Balance" section shows an "Outstanding Self-Pay" for "Lucy Antwerp" with a "Total" of "0.00". At the bottom right, a "Total Due Now" of "25.00" is displayed. A red box with a "2" highlights the "Collect Payment" button, which is labeled "Collect Payment" and "\$25.00". Other buttons at the bottom include "Cancel", "Back", "Next", and "Accept".

3. Indicate the method of payment, any reference information or comments, if applicable and click **Collect Payment**.

The screenshot shows the 'Collect Payment Now' screen. At the top, there is a green header with a calculator icon and the text 'Collect Payment Now'. Below this, a white box displays 'Payment of \$5.00 Copay'. Under the 'Payment Method' section, there are four buttons: 'Cash' (highlighted with a blue border), 'eCheck (Bank)', 'Card', and 'Other'. To the right, under the 'Receipt' section, there is a green button labeled 'Print receipt'. Below the payment method buttons, there are two text input fields labeled 'Reference #' and 'Comment'. At the bottom center, there is a large green button with a checkmark icon and the text 'Collect Payment'. Below this button is a blue link labeled 'Go Back'.

4. Click **Accept**.
5. In the Print Receipt window, click **Print** to print the receipt.

Collecting co-payments during check out

1. Click **Payments** to display the Payments form if necessary.
2. Click **Add Visit Payment** to populate the co-pay on the form.
3. Click **Collect Payment**.

Check Out - Office Visit on 1/12/22 at 10:15 AM with Drew-Cad Sal in BMG Int Med for 15 minutes

Other (Requires Comment): Previously not collected by Margaret McKenna (10:48 AM on Jan 12)

Payments (1)

This Visit

Today - Office Visit

10:15 AM

Salamanca, Drew-CAD (Bridgewater Medical Group Internal Med)

P/F #39695 • Account #2001000031721

AETNA - AETNA PPO

Benefits

Pay Now Edit

Copay

Add Prepay

Due 25.00

Add Visit Payment (2)

Previous Balance

Outstanding Self-Pay

Lucy Salamanca

P/F #39695

Pay Now Distribution

Total

Due 0.00

Add Balance Payment

Total Due Now 25.00

Collect Payment (3)

Cancel Back Next Accept

4. Follow steps 3 – 5 above to complete the process.

Collecting payments outside of check in/out

If a patient wants to make a payment not during check in or check out, you will collect the payment using the Payment Collection workflow. Use caution to make sure that you are applying the payment to the correct area. In this example we will collect a co-payment for today's visit.

1. Navigate to the Payment Collection form by using Chart Search or selecting Enterprise Billing > Payment Collection from the Epic menu.
2. Click **Add Visit Payment**.
The co-payment should automatically populate. If it doesn't, follow the steps below for adding benefit information.

Payment Collection

Previous Balance

Outstanding Self-Pay

Jim Aberdeen

P/F #38940

Pay Now

Professional

Due 210.00

Add Balance Payment

Other Visits Today

Today - Office Visit

12:30 PM Aberdeen, Drew-CAD (Bridgewater Medical Group Internal Med)

P/F #38940 • Account #2001000030262

AETNA - AETNA HMO

Benefits W

Pay Now

Copay

Add Prepay

Due 10.00

Add Visit Payment

Total Due Now 220.00

Collect Payment

3 \$0.00

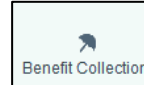
Use this section to collect prior balances.

Use this section to collect co-payments

3. Click **Collect Payment**.
4. Follow step 4 above to complete the payment collection.

Collecting Benefit Information

When co-payments are not populating automatically from the RTE (Real Time Eligibility) response, you will use Benefit Information to add the co-payment information by service type.



1. Open registration for the patient and click the Benefit Collection button on the activity toolbar.
2. Click the insurance on the form.

Benefit Collection

Encounter Information

Notes

AETNA/AETNA PPO

Payments

Encounter Information

Patient Name SALAMANCA, LUCY-CAD

Encounter Office Visit - 1/12/2022

Referral Status None

Referral —

Estimate Status —

Procedures —

Diagnoses —

Create Estimate

Notes

No notes have been entered for these benefits.

AETNA/AETNA PPO 2

Coverage Information

Subscriber Name SALAMANCA, LUCY-CAD

Patient Rel to Subscriber Self

Member ID 965412587

Effective 2/13/20

Group Number 333

Group Name —

Verification Status E-Verified

Pre-cert —

Network Level In Network (settings default)

General Benefits

Deductible amount:	
Out of Network - Individual	250.00
Deductible remaining amount:	
Out of Network - Individual	250.00
Out-of-pocket max amount:	
Out of Network - Individual	6,500.00
Out-of-pocket remaining amount:	

3. In the Benefits Per Service Type section, enter the copay for the specific service.
4. If an appropriate service tab is not displayed, type the service in the **Add a Service Type** field and click **Add Service**. You can then select the appropriate service and enter the co-pay.

AETNA/AETNA PPO View Response History

General Benefits

Selected network level: Estimate Needed?

Benefits Per Service Type

Primary Care ED Inpatient Outpatient MRI/CAT Outpatient Surgery

In Network Out of Network N/A Individual Family

Deductible amount: Deductible remaining amount:

Out-of-pocket max amount: Out-of-pocket remaining amount:

3 Copay: 25.00 Coinsurance percentage: 0 Deductible remaining amount:

4 Add a Service Type + Add Service

Close Previous Next

5. Once you have entered the co-pay, you can close the Benefit Collection activity and return to the co-pay collection activity.

Learn More



See the **Distribute Previous Balances Quickly in Payment Collection** tip sheet for information on collecting prior balances

Version #	Purpose of Change	Author	Date of Change
1.0	Initial Creation	M. McKenna	1/12/22