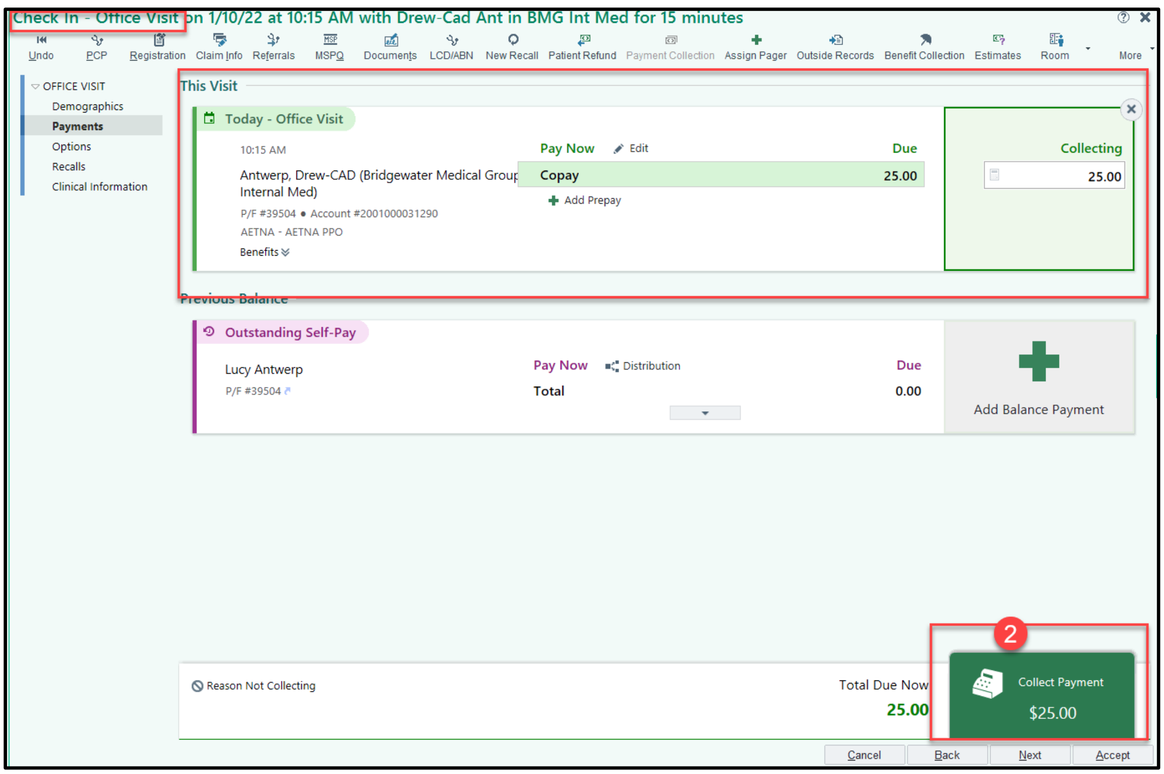
Collecting Co-Payments

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.

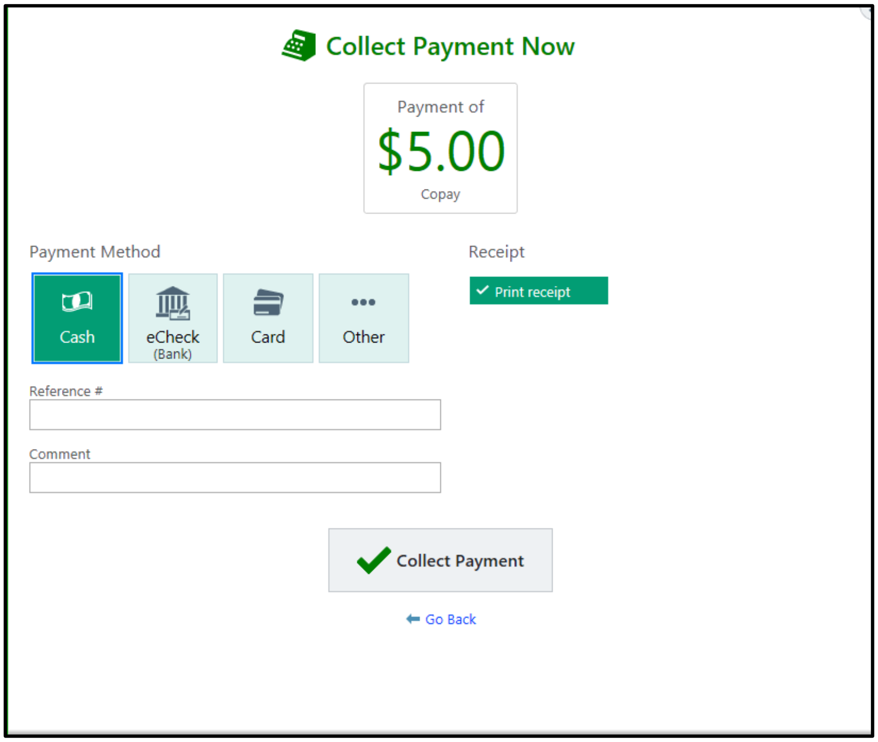
How it Works

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.**



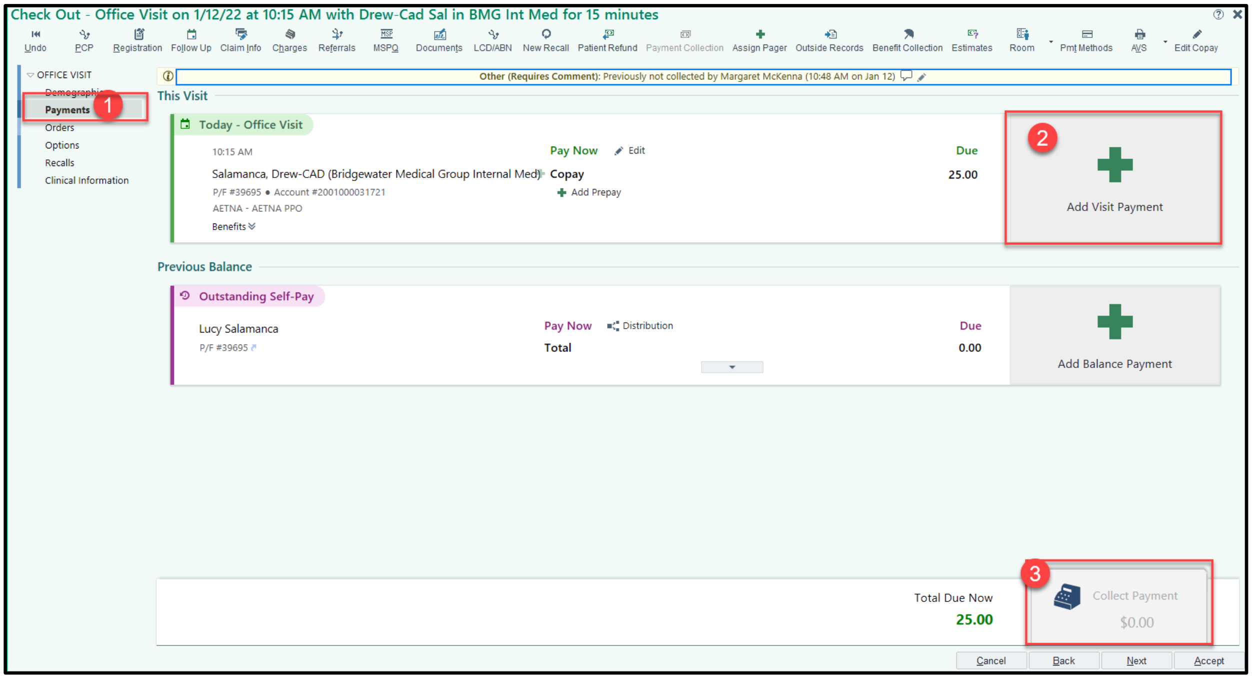
3. Indicate the method of payment, any reference information or comments, if applicable and click **Collect Payment**.



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**.

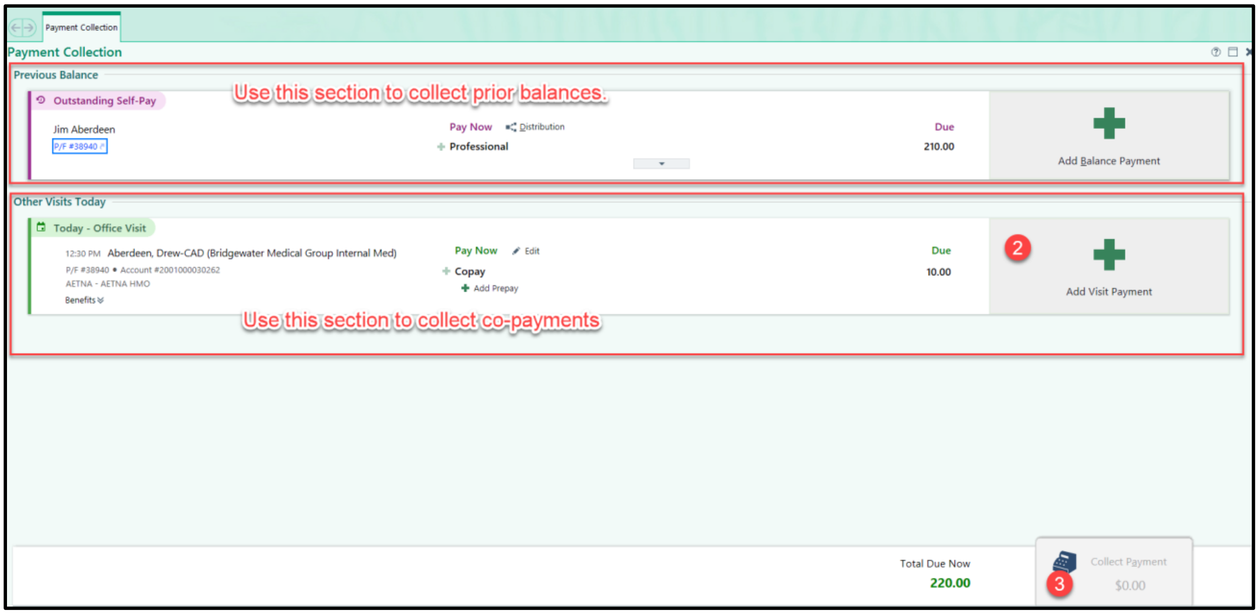


4. Follow steps 3 – 5 above to complete the process.

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.

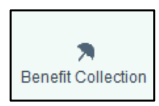
1. Navigate to the Payment Collection form by using Chart Search or selecting Enterprise Billing > Payment Collection from the Epic menu.
2. Click **Add Visit Payment**.
   The co-payment should automatically populate. If it doesn't, follow the steps below for adding benefit information.

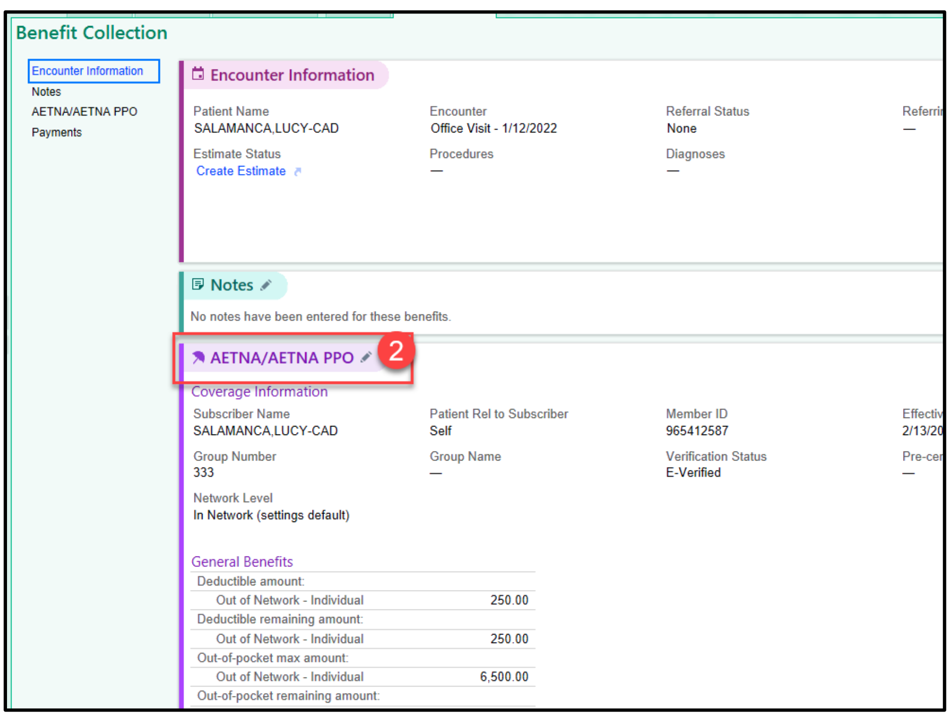


3. Click **Collect Payment**.
4. Follow step 4 above to complete the payment collection.

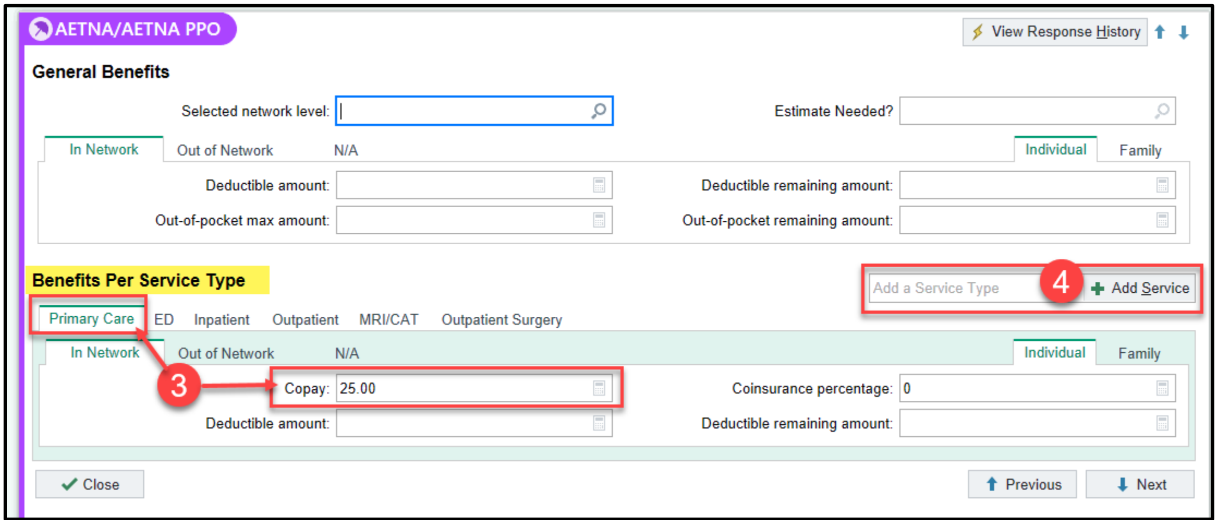
Collecting Benefit Information

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.



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.



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