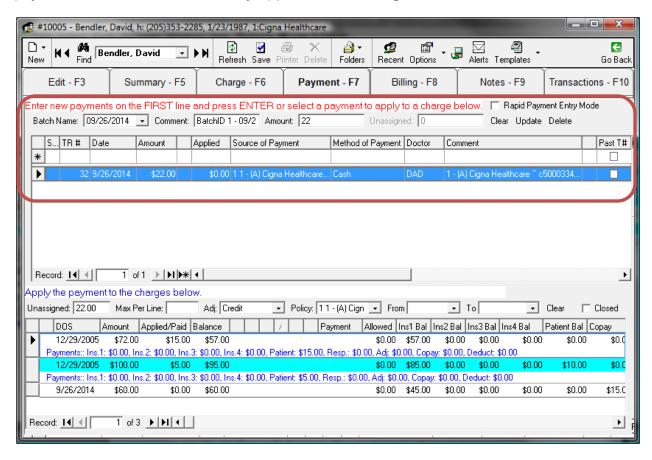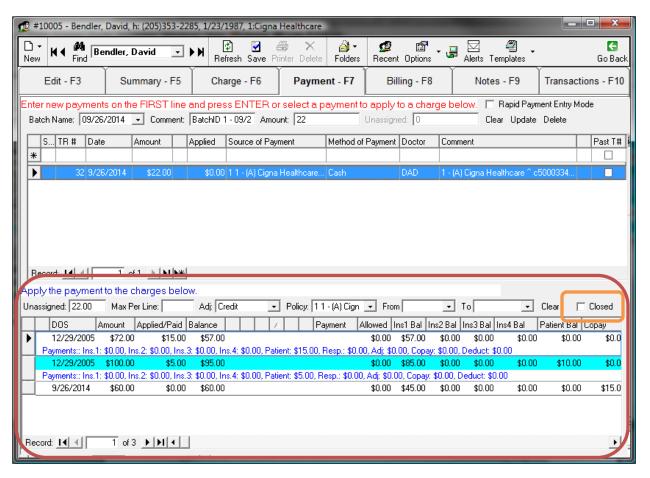## Making Payments

From the Patient account, go to the *Payment –F7* tab. You will see that there are two different sections to this page. The top section is the payment grid. The first row in the patient grid is the data entry row. Under the data entry row, there will be listed any payments that have not been fully applied to the charges or debts.

The bottom section of the *Payment –F7* tab shows charges in which you can apply payments. Only open transactions are shown in this grid UNLESS the *Closed* option is enabled.

The *Closed* option is convenient when you have charges that have already been closed and need to be adjusted (typically due to insurance changing their fees).

We will now be going back to the payment grid or the first section on the *Payment –F7* tab.

The payment grid always has the default focus set to the *Amount* field; this allows you to enter in the payment amount first. The fields to the left of the *Amount* field are the *Status* (Any error in the amounts on the payment line), the *Date*, and the *TR#*. If you hover the mouse over the *Status* field, it will say *Any error in the amounts on the payment* line. It will show a red exclamation mark if there are any amount errors (!). The *Date* field starts on today's date by default. If you change the *Date* field, it will stay at the value you set it to until you change it again or restart MedLook. This allows you to enter several payments prior to today without having to continually change the *Date* field. The *TR#* is the transaction number and is automatically assigned by the program.

The next field is the narrow field without a name in the column header. This field activates the X-Charge Credit Processing dialog.

The *Applied* amount field only pertains to payments that have already been entered, so skip that field (use the TAB key) and move along to the *Source of Payment*. In this field you select the *Payer*. Here's an example of what the drop down list looks like.

The patient's insurance carriers will be listed by name, Primary first and then Secondary, etc. A quick way to use this from the keyboard is by using the first letter (or number) of the payer you want to select. Selecting "P" would select *Patient*; selecting "O" would select *Other* and so on.

The *Method of Payment* allows you to specify how you received payment whether it was check, cash, or credit card. There is a fourth option that appears called *No Payment* but you should not select it as it is required by the program only in peculiar circumstances such as entering a zero amount payment.

The *Doctor* defaults to the patient's responsible physician but you can change it using the drop down. Again, you can open the drop down using F4, or select by the doctor's first initial, etc.

The last field is the *Comment* field. You can enter any comment you want here (up to a certain length) or select one from the drop down list. The drop down list is created using the *Payment Comments* as found in the *Helpers* folders.

After you have entered all of your payment information you must press ENTER for the payment to be loaded into the system. The grid will be immediately updated and your focus will be returned to the *Amount* field allowing you to enter another payment. The payment you just entered will appear in the grid below as determined by the sort order you have defined for the grid. Normally you should sort by *TR #* so your new entry will appear at the top for visual confirmation.

At this point we have entered the payment into the patient's account but we have not assigned it to any charge. This is something that should be done right away. It only takes a few seconds. To make an assignment select the payment in the top grid and the charge you want to assign the payment to in the bottom grid. Notice the colored buttons on the charge grid.

P W I ⬒ ⚠ ↶

These buttons are used to quickly apply payments to charges and, depending on which one is selected, deal with any remaining charge balance. Let's look at each of these buttons in turn, but first, the gray button. The gray button is the Undo, (or Reset) button. Once you've begun entering data you can reset back to the starting point as long as you haven't clicked the *Save* button. Once you've clicked the *Save* button the *Reset* button won't work.

The *Yellow Payment (P) Button* applies the amount of the charge, or the part of the charge amount you enter in the *Payment* column, to the charge. The payment will be deducted first from the matching source of payment and then from whatever else is left having a balance. For instance, if the payment is from insurance then the amount is first deducted from Ins1 (i.e. primary insurance) and then, if the amount of the payment exceeds the expected insurance payment, it will be deducted from one of the other expected payers as appropriate (not to exceed the total expected). Take a look at the following image of a grid row. Note that the numbers on the left side (*Amount*, *Applied*, and *Balance*) don't change until you click the *Save* button.

DOS	Amount	Applied	Balance				Payment ▽	Ins1	Ins2	Patient	Other	Write-Off
03/22/2005	$100.00	$0.00	$100.00	P	W	I ↶	$75.00	$5.00	$0.00	$20.00	$0.00	

Here, we've entered a $75.00 primary insurance payment and applied it to a $100.00 charge by clicking the *Yellow Payment Button*. Note the numbers outlined in red. The *Payment* column shows the amount of the payment, and the remaining balances in *Ins1* ($5.00), and *Patient* ($20.00) remain. At this point we are ready to click the *Save* button and enter this payment's application information into the system. Once finished, we could apply more payments (e.g. $20.00 from the patient), or enter write-offs to close the charge if necessary. Any write-offs would be entered using the same procedure as payments except that the *Source of Payment* will be *Write-off* (or Credit for error correction).

The *Yellow Payment (P) Button* is the simplest way to apply a payment. You would use this button if you know that you won't be entering any write-offs or credits. When entering insurance payments, it could be that you'll regularly have to enter a write-off for the remaining balance of the insurance amount due (Ins1, or Ins2), and you may even have to write off the patient amount at the same time as well. MedLook provides an easy way to do both. Let's look at another grid row.

DOS	Amount	Applied	Balance					Payment ▽	Ins1	Ins2	Patient	Other	Write-Off
03/22/2005	$100.00	$0.00	$100.00	P	W	I	↶	$75.00	$0.00	$0.00	$0.00	$0.00	$25.00

On this charge, we've entered the $75.00 payment and applied it to the charge by clicking the *Green Write-off (W) Button*. In the *Payment* column we have our $75.00, but in *Ins1*, *Ins2*, *Patient*, and *Other* everything is $0.00, which means that we don't expect any more payments from these sources. Of course, we can't let the remaining $25.00 sit there. If things don't balance, MedLook won't allow you to save the payment application. But, in this case, MedLook has taken care of it for us. The remaining $25.00 is in the *Write-Off* column. When you click the *Save* button a new write-off transaction will be created and automatically applied to the same charge to which you've just applied a payment.

Clicking the *Blue Insurance (I) Button* acts almost the same way as clicking the *Green Write-Off (W) Button*, but only acts on the insurance sources when creating the write-off. In the following image the remaining $5.00 insurance amount has been written off, but the amount due from the patient is left untouched.

DOS	Amount	Applied	Balance					Payment ▽	Ins1	Ins2	Patient	Other	Write-Off
03/22/2005	$100.00	$0.00	$100.00	P	W	I	↶	$75.00	$0.00	$0.00	$20.00	$0.00	$5.00

Clicking the *Red Right Arrow Button* moves the transaction balance from left to right through the payer list. In the grid above, if this button were clicked (at the moment it's hidden in the graphic) the $20 in the *Patient* field and the $5 in the *Write-Off* field would be move $25 to *Ins1*, then continually to the right with each click and eventually back around to *Ins1*.

Clicking on the *Yellow Yield Button* unconditionally unassigns any and all payments from the charge. This is EXTREMELY helpful when adjusting claims where the patient has already paid and then insurance overpays. For instance, if a $100 procedure has $30 patient co-pay at the time of the visit and a short time later insurance pays $85 (instead of the expected $70) then we will unassign the patient payment. Simply click the *Yellow Yield Button* and the $30 is unassigned, and then the patient payment will reappear in the top grid with nothing applied and the procedure will be listed as $100 with nothing applied.

Next enter the $85 insurance payment, click on the **P** button to make the payment of $85, and *Save* the assignment. This leaves $15 due from the patient. Select the $30 co-pay on the top grid and click on the **P** in the bottom grid for the same $100 charge. $15 will be applied. *Save* the result. The procedure is now paid in full ($85 from insurance and $15 from the patient) and disappears from the lower grid. The top grid now shows the $30 patient co-pay with $15 applied and $15 remaining. At this point the patient can be refunded the $15 and the account debited to reflect the refund (credit card processing works with refunds too) or the $15 can remain in the account until the patient returns and the payment applied to the next visit.

Once you've entered the payment data and clicked one of the application buttons, the *Applied* and *Balance* columns will change to reflect the amount applied. The amounts in the columns reflecting amounts due will be locked in. The following image shows our charge after using the *Blue Insurance (I) Button* to apply the $75.00 payment. The *Ins1* amount is now $0.00. A $5.00 write-off has been applied, and the $20.00 *Patient* amount remains due from the patient.

DOS	Amount	Applied	Balance				Payment ▽	Ins1	Ins2	Patient	Other	Write-Off
03/22/2005	$125.00	$105.00	$20.00	P	W	I	↰	$0.00	$0.00	$20.00	$0.00	

Here's the charge as shown on the *Transaction Grid* with *Show Preview Lines* enabled.

```
C        101006 03/22/2005    $100.00    $80.00    $20.00      $0.00    $0.00 $20.00  $0.00 $0.00 90015     03/22/2005
  Pmts:  TrNum    Amount  Explanation
         101011    75.00   Ins.1
         101017     5.00   Crtsy
```

The charge amount is $100.00, with $80.00 applied, leaving $20.00 due from the patient. The $80.00 applied amount consists of a $75.00 insurance payment and a $5.00 write-off. We applied the payment and created the write-off in one step by clicking the *Blue Insurance (I) Button*.

After a payment has been assigned in full it will no longer appear in the payment grid. Only payments that have something yet to be applied will appear in this grid. The charges will not appear in the charges grid once they have been paid in full. Your goal is to have as few charges shown as possible because that means you're being paid!

You can edit the payment in the top grid if you inadvertently entered something wrong. You are allowed to edit the same fields you can edit when loading a new payment. You cannot alter the *Source of Payment* once the payment has been applied to a charge. Of course, you cannot set the *Amount* to something less than that already applied either.

You can delete payments from the payment (top) grid but only if they have not been accepted on a *Daily Ledger Report* and have not been applied to any charge(s). You can also delete open charges from the charge (bottom) grid but only if they have not been posted and have not had any payments assigned. You can edit and delete (non-posted) payments and charges using the *Transaction* tab, even those with associated transactions (charges or payments).

Here is some important information to remember when navigating the *Payment –F7* tab.

The *Unassigned Payment* box always shows the remaining amount of a payment that can be applied to charges. This is useful if, for example, you're entering a lump sum payment from an insurance carrier and applying it to multiple charges. And, speaking of applying payments to multiple charges, that brings us to the *Max Payment per Line Item* box. Let's say you have a $1000.00 insurance payment that will be applied to ten different charges at $100.00 per charge. Enter $100.00 in the *Max Payment per Line Item* box and click the *Yellow Payment (P) Button* on each charge row. Once you've clicked each charge, click the *Save* button and you're finished. You've applied a large payment to ten different charges in just a couple of seconds.

There's a lot of information about *Payments* in the help file. When you have the *Payment* dialog open, press the *F1* key and the associated *Help* information will be presented. Here you'll find descriptions, explanations, and links to examples and tutorials.