

Account on File

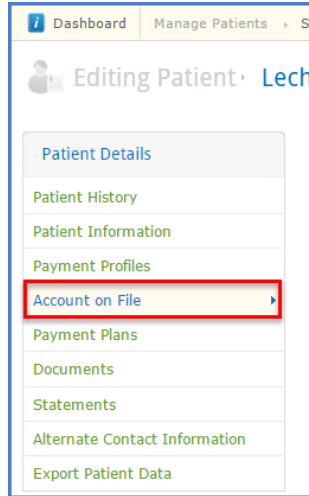
ClearGage provides the functionality to keep an “Account on File” (AOF) for patients. This may be used, for example, when a claim is submitted to an insurance company and has not been fully covered. The AOF would allow you to process a payment against the payment method on file for the balance remaining rather than sending a statement to the patient.

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Patient Level setup

1. Add each new patient to ClearGage by going to Manage Patient, Add Patient. See separate Resource Center document Add a New Patient for detailed steps. The patient’s email address is a required field for the full AOF process to work correctly.
2. Search for the patient name. Go to Manage Patients, Search Patients, enter the search criteria and click “Search”
3. In the search results list locate the patient name and, to the right of the patient name, click “Edit”
4. The Editing Patient screen will open. In the left navigation click “Account on File”.



- 5. The Account on File information will open in the right reading pane. Review the default information and adjust as needed. Enter the payment Method information

A screenshot of the 'Account on File' setup screen. At the top right, there are two green buttons: 'Print Agreement' and 'Email Agreement'. The main form area contains several fields: 'Account Authorization Status' with a dropdown menu set to 'Active'; 'Maximum Authorized Amount per Payment Event' with a text input '100.00' and range 'Min: \$0.01 Max: \$500.00'; 'Maximum Number of Payment Events' with a text input '12' and range 'Min: 1 Max: 24'; 'Authorized Duration of Agreement (in months)' with a text input '12' and range 'Min: 2'; 'Payment Method' with a dropdown menu set to 'Discover - 6909'; and 'Alt. Payment Method' with a dropdown menu set to 'Checking - 3123'. At the bottom center, there is a green button with a checkmark and the text 'SAVE CHANGES'.

Patient Account on File Setup screen

- 6. Click "Print Agreement" and review the document with the patient. Have the patient initial and sign the document. Give a copy to the patient.



Demo Header
121 Blank St
Anytown USA 12311
888-888-8888
www.demoheader.com

Preauthorized Payment Agreement

Patient Name:	Emily Grasson	Address:	123 Main st
Date of Birth:	12/30/1980		Any City, AL 32568
Patient ID:	LS11901	Home Phone:	555-555-5555
Email:		Work Phone:	
		Mobile Phone:	

Agreement Details	
Description of Services	General Healthcare Services
Payment Method (Primary)	DISC-6909
Payment Method (Alternate)	Checking-3123
Maximum Authorized Amount per Payment Event	\$100.00
Maximum Number of Payment Events	12
Authorized Duration of Agreement (in months)	12 Months

Care Plan Terms and Conditions

I authorize the debiting of my primary account first and if funds are not available I authorize my provider to debit my secondary account for amounts up to the total amount authorized by me herein. Furthermore, I understand that I am in full control of my payment method and account, and if at any time decide to change my payment method, I will notify my provider with thirty (30) days notice of my payment method change. Initial _____

I acknowledge that this is an estimate and not a guarantee of the amounts I will owe and that I am fully responsible for any amounts up to the total amount of any service and/or procedure authorized by and provided to me. Initial _____

By providing my email address and/or mobile phone number I am consenting to receive emails and/or text messages regarding my payment activity. Initial _____

Patient Signature	Date
Provider Representative	Date

Account on File Patient Agreement

7. Return to the Account on File screen, change the ‘Account Authorization Status’ dropdown to “Active”
8. Click the “Save Changes” button

Processing payments using the AOF

Using One-Time Transaction

Do not use the One-Time Transaction option from the Transactions tab because this is used to process retail transactions and is not linked to a patient that has been added to the system.

Search for the patient and in the search results list click on the “Pay” button to the right of the patient’s name. Alternatively, click the “Edit” button to the right of their name and then use the Make Payment button.

The One-Time Transactions screen will open and it will be pre-filled with the patient information. In the Payment Method drop down select the method that has the AOF indicator next to it. Both the Primary and Alternate payment methods will be listed if two were entered in the AOF setup.

One Time Transaction

Payment Information

Patient First Name * Patient Last Name * Amount * Payment Method *

 Patient ID Payment Plan ID Txn. Type *

 Claim Number Encounter ID Date of Service

 Notes

Existing Profiles

- Savings - 1212
- VISA/Credit - 8291
- Checking - 5654
- VISA/Credit - 1111

Account on File Agreement

- AOF Pri. - VISA/Credit - 8291
- AOF Alt. - Savings - 1212

One Time Methods

- Credit/Debit Card
- Checking/Savings
- Cash

When using the AOF payment method the transaction will be recorded as a payment against the AOF Authorization Agreement that has been signed by the patient.

As payments are set up on the One-Time Transaction screen, the AOF Payment Summary will display a running total of the number of payments and the total amount.

One Time Transaction * Required Fields

Payment Information

Patient First Name * Patient Last Name * Amount * Payment Method *

 Patient ID Payment Plan ID Txn. Type *

 Claim Number Encounter ID Date of Service

AOF Payment Summary

Effective Date: 08/26/2016

Payments to Date: 2 / 12

Total Amount: \$89.11

Max Pmt. Amount: \$100.00

To process payments using the AOF

The Account On File Upload Template will be used to import an amount owing into ClearGage for each person for whom you need to process a payment. There is no limit to the number of names contained on the spreadsheet. However, it is necessary that the patient information be in ClearGage prior to the upload.

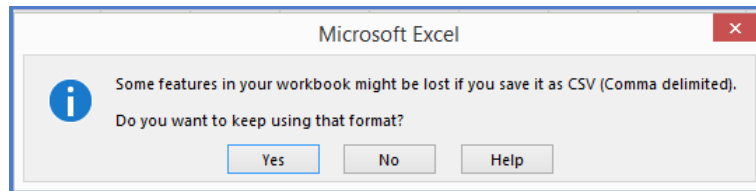
CLEARGAGE

1. Click on the Resource Center Tab and click “Resources”. Under the Account on File heading click on “Account On File Upload Template” to download the template to your computer. Save the template to a location you will easily remember, you can re-use this template.
2. Open the template and enter the data to be uploaded. At a minimum you must include Patient ID, First Name, Last Name, and Amount.

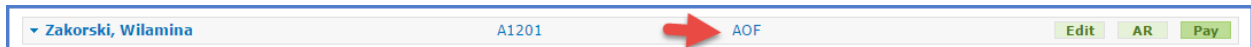
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	Date of Service	Encounter	Patient ID	First Name	Last Name	Amount	DOB	Gender	Address 1	Address 2	City	State	Zip	Home Phone	Mobile Phone	PH	E Mail	
2	2/21/2015		A1201	Wilamina	Zakorski	56.89												
3	2/21/2015		A1202	Lech	Zabrev	120.15												
4	2/21/2015		A1203	Olga	Zelaske	37.94												
5	2/22/2015		A1204	Able	Zeno	42.51	12/1/1971	m										
6	2/22/2015		A1205	Constance	Zeigler		10/15/1973	f	1234 W Main St		Macon	GA	65785	4254564565			ziggyc@test.com	
7																		

Account on File Upload Template

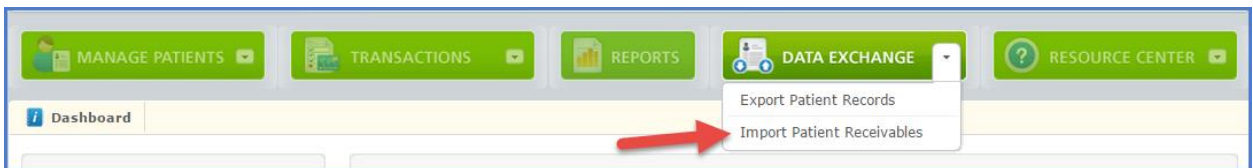
3. Save the spreadsheet to your desk top or some other easily remembered location. It is helpful to include today’s date in the file name. For example, Account On File Upload 2-8-15. When saving the file you will see the message below, click Yes.



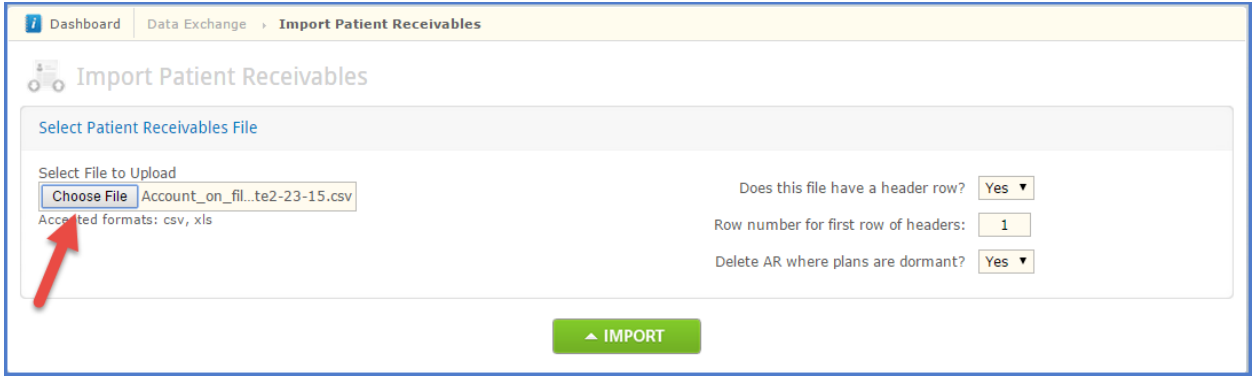
4. Review the list of patients on the import spreadsheet to ensure that all of the names are already set up in ClearGage and that AOF is in place for all. If AOF is not in place a payment will **not** process. The AOF flag will be displayed next to patient names in the Patient Search Results.



5. Click on the Data Exchange button and select “Import Patient Receivables”

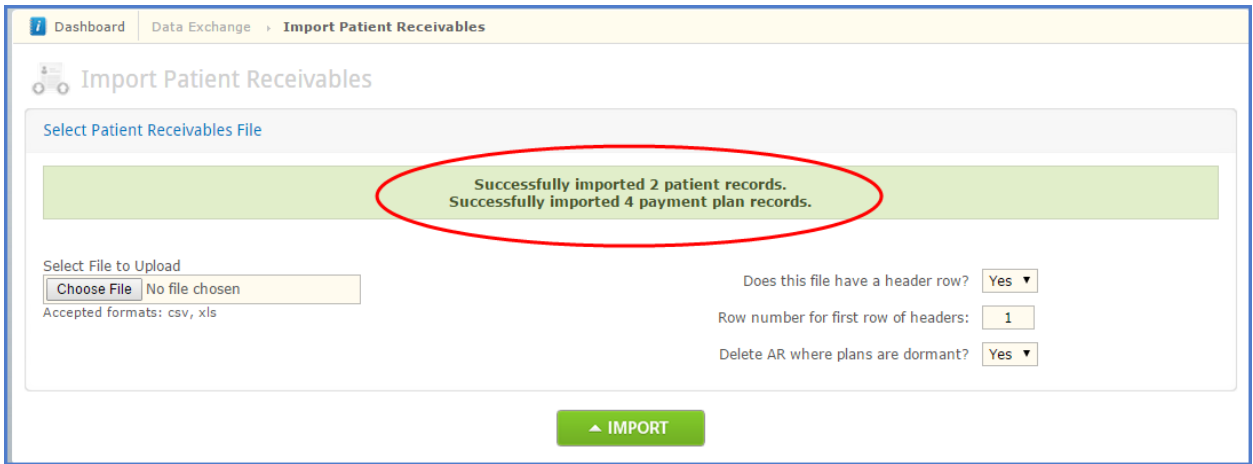


6. In the Import Patient Receivables screen click on the “Choose File” button to select the file you saved in step 3 above. Leave the three question on the right with the default answers.



Import Patient Receivables Screen

- 7. Click Import.
- 8. You will receive a confirmation that the file has imported along with a description of what is importing.



Import Confirmation

- 9. As soon as the file has uploaded, the patients who have an email address in ClearGage will receive an email notifying them that a payment will be processed and the date on which it will processed.

The email is sent with the subject line "Preauthorized Payment Scheduled"

Dear Lech Zabrev,

Please note that, per your agreement with our office, we will be processing a \$120.15 payment against your account on file ending in 8431. This payment will be processed on 02/24/2015.

Please contact our office at 515-515-5151 if you have any questions.

Thank you.

Best Health Care

Sample AOF Email Notification

What happened in ClearGage

As a result of the file upload:

- The three patients who had correctly been added to ClearGage with the AOF set up, are showing an Active AR One Time Payment plan and the Amount owing. Zabrev, Zakorski, and Zelaska.
- The one patient, Zeno that had not previously been added to ClearGage has now been added but the amount he owes has been set up on a Dormant Plan and will not be processed for payment. The plan cannot be activated until additional Patient Information is entered and the AOF is set up.
- The one patient, Zeigler that had not been added to ClearGage *and* did not have an amount owing on the import spreadsheet has now been added as a patient BUT the AOF is not in place.

Search Results <i>(Click patient names to see plans)</i>				5 Patients Found	Sort By Last Name
Patient Name	Patient ID	Flags			
Zabrev, Lech	A1202	AOF	Edit	AR	Pay
Plan: ZAO9M63Y-A6XW9FRE	Bal w/o Fees: \$120.15	Type: AR One Time Payment	Status: Active	Action	
Encounter ID:	Date of Service: 02/21/2015				
Zakorski, Wilamina	A1201	AOF	Edit	AR	Pay
Plan: Z3Q5HD2F-A505OVOE	Bal w/o Fees: \$56.89	Type: AR One Time Payment	Status: Active	Action	
Encounter ID:	Date of Service: 02/21/2015				
Zeigler, Constance	A1205		Edit	AR	Pay
No active payment plans for this patient.					
Zelaska, Olga	A1203	AOF	Edit	AR	Pay
Plan: Z2SWEV9F-AB3U54R3	Bal w/o Fees: \$37.94	Type: AR One Time Payment	Status: Active	Action	
Encounter ID:	Date of Service: 02/21/2015				
Zeno, Able	A1204		Edit	AR	Pay
Plan: ZOHEAWND-A6D88PR7	Bal w/o Fees: \$42.51	Type: AR One Time Payment	Status: Dormant	Action	
Encounter ID:	Date of Service: 02/22/2015				

Search Results AFTER AOF Template Upload

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Once the AOF information is in place for Zeno, then on a subsequent file upload the Dormant AR plan would be deleted and replaced with an active plan as long as all of the details of the encounter match. For example, the date of service and amount. If the encounter does not match then the Dormant AR plan will remain in place and a new Active plan will be created.