athenahealth

athenaPractice™
PatientPaymentAutoPost
EDI Plug-in 2022.01.29.0

Installation and Setup
Guide

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Contents

The PatientPaymentAutoPost (PPAP) EDI plug-in is an auxiliary program that works with athenaPractice v12.3, v19.x, v20.x, or later to allow the automatic posting of personal payment files from the EDI clearinghouse. This document describes how to install and set up the PPAP EDI plug-in and modify your existing athenaPractice database to post these personal payment files.

The procedures you need to perform depend on your reason for installing the plug-in, for example first-time implementation of EDI patient payment processing versus a simple plug-in upgrade. Refer to the appropriate checklist to determine the required procedures.

Checklist for first time installations

If your practice is new to EDI patient payment transaction processing or if this is a first-time installation of the PPAP plug-in, you need to perform the following tasks to install the plug-in and set up athenaPractice for transaction processing.

☐   Some tasks have more than one procedure.

- ❑ "Patient Payment Setup"
- ❑ "Order PatientPaymentAutoPost license"
- ❑ "Collect required information"
- ❑ "Install the PatientPaymentAutoPost EDI plug-in"
- ❑ "Verify plug-in installation"
- ❑ "Set up the clearinghouse"

Checklist for upgrading only

If you want to upgrade the currently installed plug-in, you need to perform only the following procedures.

If you are changing clearinghouses, you should consider this a new installation. See the "Checklist for first time installations" .

- ❑ "Uninstall the previously installed PatientPaymentAutoPost EDI plug-in"
- ❑ "Install the PatientPaymentAutoPost EDI plug-in"
- ❑ "Verify plug-in installation"

Patient Payment Setup

Before you can electronically process patient payments through the PatientPaymentAutoPost clearinghouse, you must be contracted for VVC Holding Statements.

Once your contract has been processed you can install the patient payment plug-in. Once you are setup with SmartPay and are processing patient payments online, you will receive your first patient payment file. Please follow up with your EDI Implementation specialist to help setup and post the first file.

Order PatientPaymentAutoPost license

Before you can use the PatientPaymentAutoPost Plug-in to automatically post patient payment files, you must have a PPAP license.

If you are a new customer, your PatientPaymentAutoPost license is ordered by your VAR or VVC Holding LLC sales representative when you purchase athenaPractice. License numbers are added to your database when the VAR or sales representative installs at your site.

If you are adding this plug-in to your current athenaPractice system, contact your VAR or VVC Holding LLC sales representative, and they will contact VVC Holding LLC to add PPAP to your license. Then, VVC Holding LLC Technical Support will contact you to help you add the license information to your database.

The PatientPaymentAutoPost license is:

License	ID	Part number
CEDI Post PT Payments	714	Centricity EDI Auto Post Patient Payments

Collect required information

Use the following checklist to ensure you have the information required to set up the athenaPractice database for EDI transaction processing.

Site information

❑ Server name – name of your SQL server _____

❑ Username – SA (system administrator) _____

❑ Password – system administrator password _____

❑ Database name _____

PatientPaymentAutoPost information

❑ File Transmission Logon ID – contact your EDI Implementation Specialist

❑ File Transmission Logon Password – contact your EDI Implementation Specialist

❑ File Transmission User ID – contact your FileTransfer Specialist

❑ File Transmission Submitter Name – contact your EDI Implementation Specialist

Uninstall the previously installed PatientPaymentAutoPost EDI plug-in

Perform this procedure to uninstall the PatientPaymentAutoPost EDI plug-in on a workstation (local computer) or a network server.
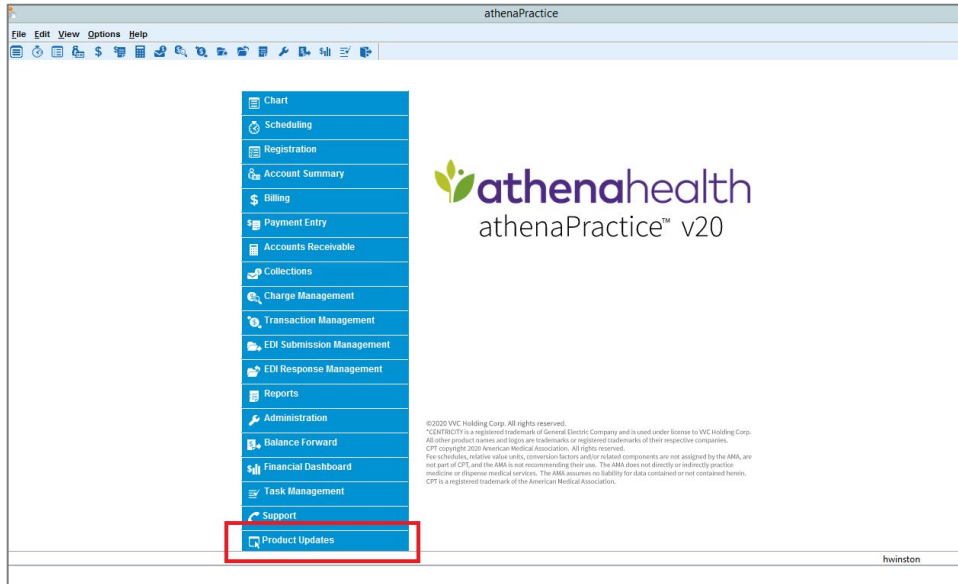
1. Exit the athenaPractice application completely.

2. Navigate to the **Control Panel\Programs\Programs and Features.**

3. Select the previously installed PatientPaymentAutoPost EDI plugin and select **Uninstall** option. Follow the uninstallation process.

4. Verify that the PatientPaymentAutoPost EDI plug-in was successfully removed from **Programs and Features.**

5. This is a one-time step. The other steps are repeated on each client where you have the plug-in installed. Remove the PatientPaymentAutoPost folder from the install folder and the PatientPaymentAutoPost XML file from the Optional folder in JBoss. Here is the default directory: C:\Program Files\Centricity Practice Solution\jboss\standalone\deployments\demo.client.war\install; where demo is replaced by the name of your database.
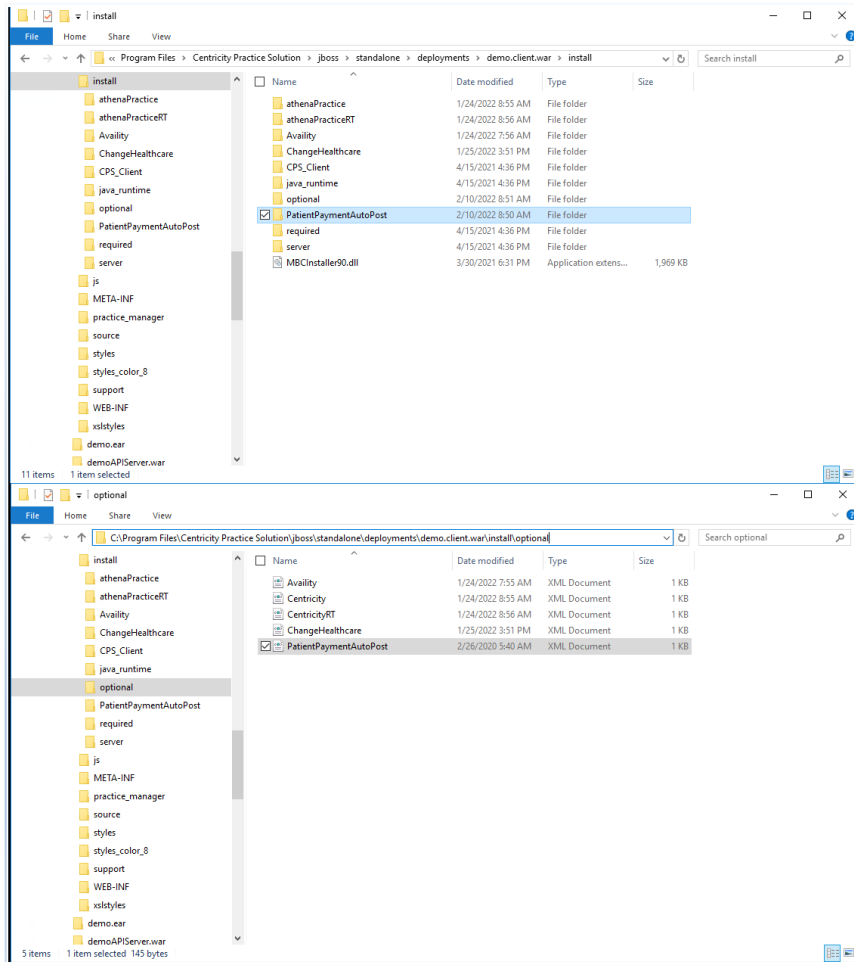
6. Ensure below 3 DLLs are deleted from all your clients where the previous version of the PPAP plugin was installed. This is the default location: C:\Program Files (x86)\Centricity Practice Solution\Client. The uninstall from the Control Panel in step 2 may have removed some or all of the dlls. However, any that remain should be deleted for a clean install.

PatientPaymentAutoPost.dll
PatientPaymentAutoPost.Utils.dll
Virence.CPO.PatientPaymentAutoPost.FileParser.dll
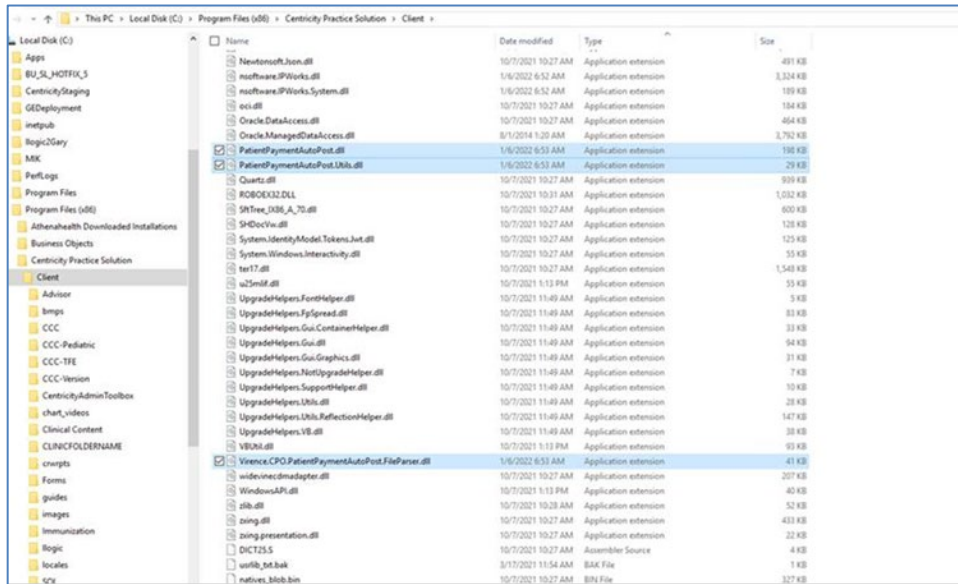
Install the PatientPaymentAutoPost EDI plug-in

Perform this procedure to install the PatientPaymentAutoPost EDI plug-in on a workstation (local computer) or a network server.

☐   If you are installing the plug-in locally, you must install the plug-in on all workstations that are used to post patient payments.

Prerequisites

❑   "Patient Payment Setup" .

❑   Have administrative privileges to the computer or be logged on as the administrator.

❑   Know the server name, database name, and SA password. See "Collect required information" .

❑   Have athenaPractice security permissions.

To install the PatientPaymentAutoPost EDI plug-in

1. From the main menu, click the **Product Updates** button.

2. The athenaPractice Product Installation page will appear.

📖 **Important Note**

Before proceeding to the next step for installation or upgradation of plugins, the user will need to have the "**Product Update**" page open but completely exit the CPS application. To ensure that no application process is running in the background using the "Reset CPS Process" option available on the client desktop to close any orphaned CPS process running in the background.

If you are on a Terminal Server or Citrix Server client machine, ensure that all users have logged out and exited the CPS application.

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3. Click the link **Visit the athenaPractice Website for Product Updates** to download updates.

The Product Updates page displays.

4. Under **Status**, select the **Download Update** or **New Download** link for the desired plug-in.

The File Download page displays:

5. Verify the messages when the download is completed.

6. Click **Back to Product Update page**.

7. Click **Back to Product Installer Page**.

8. In the **Optional Components** section (for a new installation), select the **PatientPaymentAutoPost EDI** install link to install the plug-in for the first time.

9. The InstallShield One-Step Install page displays, click on **Install.**
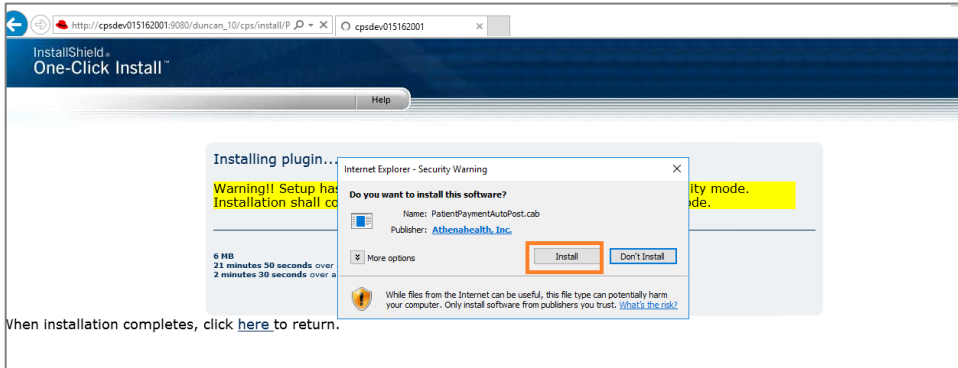
10. The InstallShield Wizard displays, click on **Next.**
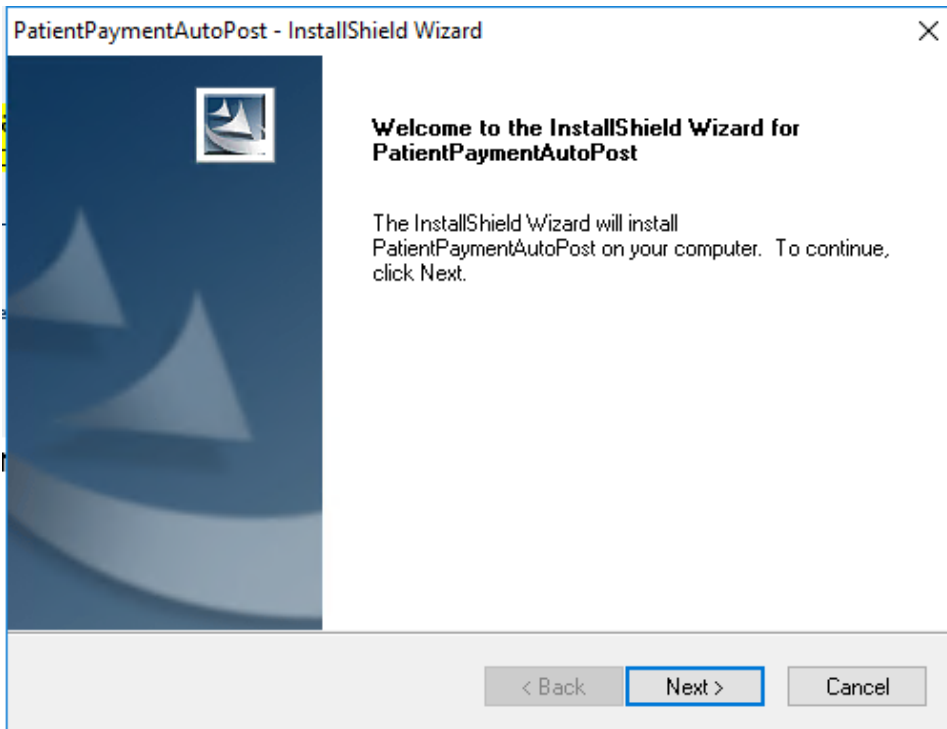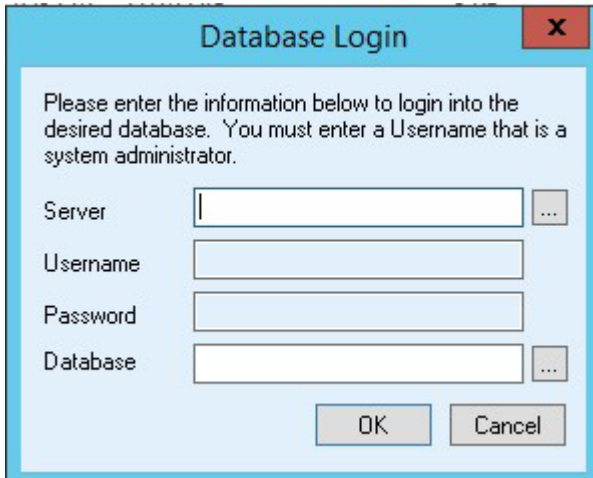
11. Follow the installation instructions to complete the installation.
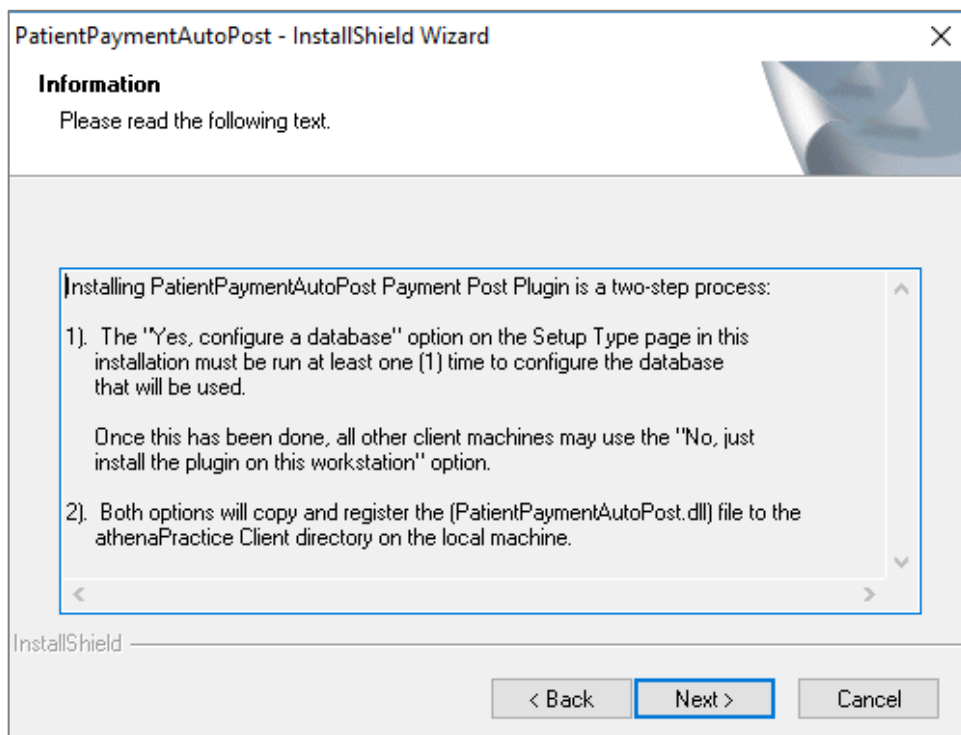
12. Click **Next** to Configure with Database.
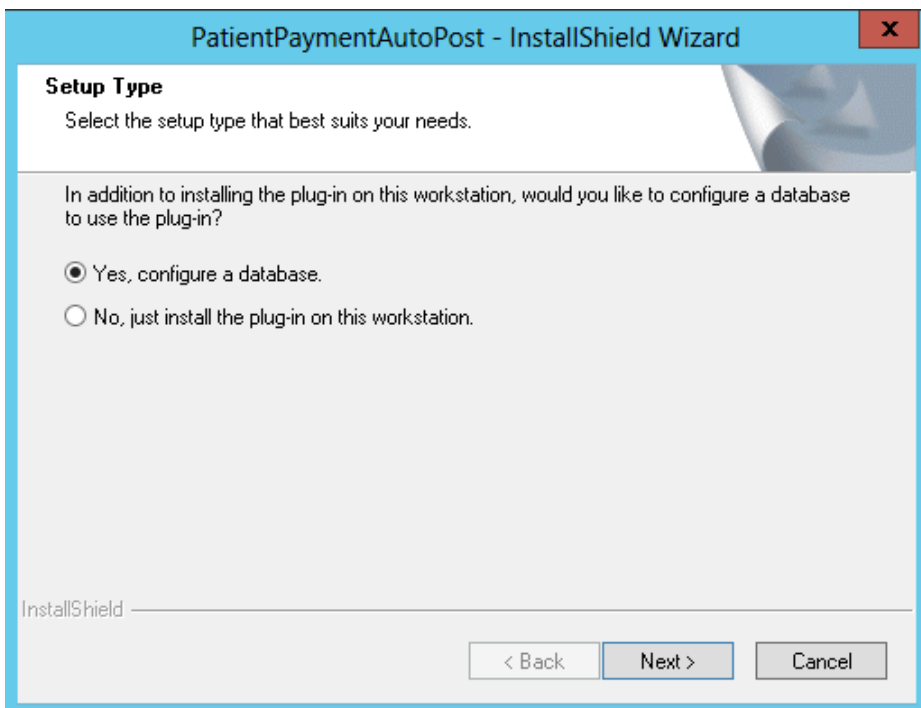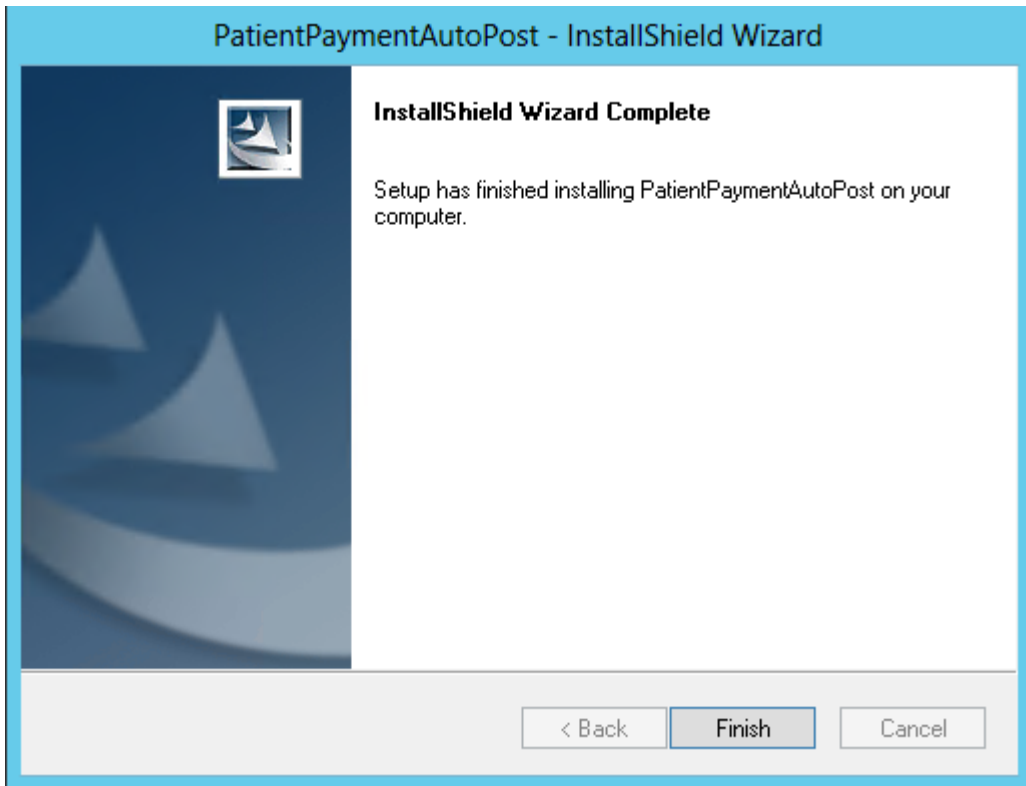
13. Fill out the Database details, Click **OK.**

Database Login

Please enter the information below to login into the desired database. You must enter a Username that is a system administrator.

Server

Username

Password

Database

OK   Cancel

14. Click **Finish** to complete the installation. Restart the workstation if required.

PatientPaymentAutoPost - InstallShield Wizard

InstallShield Wizard Complete

Setup has finished installing PatientPaymentAutoPost on your computer.

< Back   Finish   Cancel

15. Verify that the application version is correct in the Control Panel and Product Update page:

Name	Publisher	Installed On	Size	Version
PatientPaymentAutoPost	athenahealth, Inc	1/12/2022	4.95 MB	2022.01.29.0

athenahealth

athenaPractice™ v20

Visit the athenaPractice Website for Product Updates

Client Setup

The following files will install the athenaPractice application and required service packs on your machine.

Product Name	Local Workstation	Local Server	Status
CPS_Client	20.0.6757.0	20.0.6757.0	no update required

Optional Components

Product Name	Local Workstation	Local Server	Status
PatientPaymentAutoPost	2022.01.29.0	2022.01.29.0	no update required

Java Runtime Environment
This is the Sun Java Runtime Environment. It is required for using search in the online help and for internet transmission to some EDI payers. If you do not have Java Runtime on your workstation, please install this item.

Verify plug-in installation

Perform this procedure to ensure the PatientPaymentAutoPost EDI plug-in is successfully

installed. To verify plug-in installation

1. From the athenaPractice main menu, click **Administration**.

   The Administration window displays.

2. Select **Edit > Plug-Ins**.

   The Plug-ins window displays with the Claim Files Creator tab selected.

3. Select the **Statement File Creator** tab.

4. Select the desired plug-in, then click **Verify**.

   The File Creator window displays.

5. Ensure each item is "available," then click **OK**.

6. Select the **File Transmitters** tab, then repeat steps 4 and 5.

7. Click **Cancel** to close the Plug-in window.

Troubleshoot installation

Plug-in file settings are configured automatically when you install the plug-in. If your installation verification failed, compare your plug-in file settings with the settings in the examples that follow. If you find discrepancies, contact your VAR or Services.

☐ Do not alter these settings unless you know how to create your own plug-ins or have specific instructions from your VAR or Services.

☐ Before using EDI Submission Management, you must log out of athenaPractice and close the Internet Explorer® start screen to view recently installed plug-ins.

The procedure for comparing plug-in file settings for PatientPaymentAutoPost EDI is "View PatientPaymentAutoPost EDI plug-in file settings" .

View PatientPaymentAutoPost EDI plug-in file settings

Perform this procedure to compare your PatientPaymentAutoPost plug-in file settings to the settings in the examples.

To view the PatientPaymentAutoPost plug-in file settings

1. From the Administration window, select **EDI> Plug-ins**.

   The Plug-ins window displays with the Claim File Creators tab selected.

2. Select the **File Transmitters** tab, then from the **Name** column select **PatientPaymentAutoPost File Transmitter**.

3. Click **Modify**.

The Modify File Transmitter window displays.

4. Compare your settings with the settings in the example, then click **Cancel**.

5. Select the **Statement File Creators** tab.

6. Select **PatientPaymentAutoPost Statements File Creator**, then click **Modify**.

The Modify Statement File Creator window displays.

7. Compare your settings with the settings in the example, then click **Cancel**.

8. Click **Cancel** to close the Plug-ins window and return to the Administration window.

Set up the clearinghouse

Before you successfully process electronic patient payment files via the PatientPaymentAutoPost clearinghouse, you must ensure the athenaPractice database is set up with the required information. For example, the database must contain clearinghouse-specific information for connecting and logging on and transmitting files.

Procedures for setting up the clearinghouse are:

- "Select PatientPaymentAutoPost and access the Edit Clearinghouse Settings window"

- "Set up submitter information"

- "Set up File Transmission"

Select PatientPaymentAutoPost and access the Edit Clearinghouse Settings window

Perform this procedure to find the PatientPaymentAutoPost clearinghouse and access the Edit Clearinghouse Settings window. From this window, you enter information that is required to create and transmit patient payment files.

To select PatientPaymentAutoPost and access the Edit Clearinghouse Settings window

1. From the Administration window, select **EDI> Clearinghouses**.

   The Find Clearinghouse window displays.

2. Click **Search**.

3. In the search results, select **PatientPaymentAutoPost**, then click **Edit**.

   The Edit Clearinghouse Settings window displays with the File Transmission/Processing tab selected.

Set up submitter information

Perform this procedure to enter contact information that enables two-way communication between your site and the PatientPaymentAutoPost clearinghouse.

Prerequisites

- Obtain site contact and PatientPaymentAutoPost logon information. See "Collect required information" .

- "Select PatientPaymentAutoPost and access the Edit Clearinghouse Settings window" .

To set up submitter information

  ☐ On the **File Transmission/Processing** tab of the Edit Clearinghouse Settings window under

Submitter Information, complete the fields using the following criteria:

* ☐ indicates an entry or selection in this field or row is required.

Recommended ☐ indicates the suggested setting for

Use this field...	To do this...

PatientPaymentAutoPost. **Site specific** ☐ indicates site specifications.

* Name	**Site specific** ☐ Enter the name of the company or office that is transmitting files.
* Contact	**Site specific** ☐ Enter the name of the person the clearinghouse may contact as needed.
* Phone	**Site specific** ☐ Enter the phone number of the contact person at this site.
*Logon ID	**Site specific**☐ Enter Logon ID.
* Logon Password	**Site specific** - Enter Logon Password.

Set up File Transmission

Perform this procedure on computers used to transmit files to the clearinghouse.

Prerequisites

- Obtain connection information. See "Collect required information" .

- "Select PatientPaymentAutoPost and access the Edit Clearinghouse Settings window" .

To set up file transmission

1. On the **File Transmission/Processing** tab of the Edit Clearinghouse Settings window under **Plug-ins**, select **PatientPaymentAutoPost File Transmitter** from the **File Transmission** list.

2. Click **Settings**.

The Payment Auto Post Transmission Settings window displays.

Payment Auto Post Transmission Settings	☒
Account Number	
User ID	FileTransfer
URL	https://edi.idxasp.com/XMLFileTransfer
Time Zone	CST Central Standard Time ▾
Timeout	60 Reset URL
	OK Cancel

3. Complete the fields using the following criteria:

* ☐ indicates an entry or selection in this field or row is required.

Recommended ☐ indicates the suggested setting for PatientPaymentAutoPost.

Site specific ☐ indicates site specifications.

Clearinghouse specific ☐ indicates clearinghouse-specific requirements. Check with the clearinghouse to determine requirements.

Use this field...	To do this...
Account Number	**Recommended** ☐ Leave Blank
*User ID	**Site specific** ☐ Enter FileTransfer (provided by your implementation or support analyst)
URL	Enter https://edi.idxasp.com/XMLFileTransfer
TimeZone	**Site specific** ☐ Select the time zone for your site
Timeout	**Recommended** - Enter 60

4. Click **OK** to save your changes and return to the Edit Clearinghouse Settings window.

Set up File Processor

Perform this procedure to select the patient payment remit posting parameters.

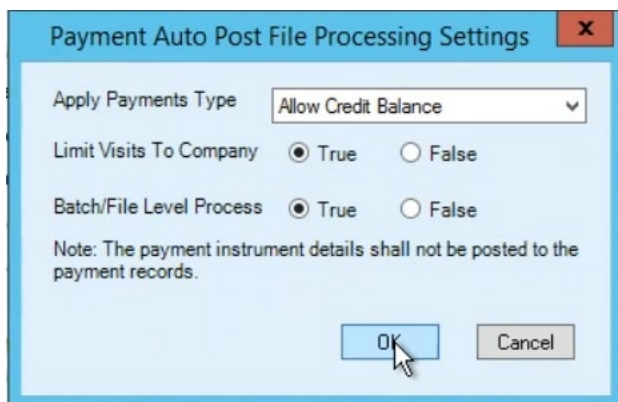**Prerequisites**

- "Select PatientPaymentAutoPost and access the Edit Clearinghouse Settings window" .

To set up File Processor

1. On the **File Transmission/Processing** tab of the Edit Clearinghouse Settings window under **Plug-ins then File Processor section**, select **PatientPaymentAutoPost File Processor** from the **File Processor dropdown** list.

2. Click **Settings.**

The Payment Auto Post File Processing Settings window displays.

3. Complete the fields using the following criteria:

   * □ indicates an entry or selection in this field or row is required.

   Recommended □ indicates the suggested setting for PatientPaymentAutoPost.

   Site specific □ indicates site specifications.
   Clearinghouse specific □ indicates clearinghouse-specific requirements. Check with the clearinghouse to determine requirements.

Use this field...	To do this...
*Apply Payment Type	**Site specific** □ Select payment mode to apply payment Allow Credit Balance or Don't Allow Credit Balance
	Allow Credit Balance: This would select all claims for a specific guarantor that have personal balances. Payments would be applied beginning with the claims with the oldest DOS. The plug-in will continue paying claims with patient balances until the payment amount is exhausted. If a patient payment amount still remains unapplied and there are no more claims with patient balances, then the residual patient paid amount will be applied to the last procedure paid and put the claim in an overpaid status. If no claims are identified with a patient balance, then no amount will be posted, and the amount will be reported in the Unapplied section of the log report in EDI Response Management.
	Don't Allow Credit Balance: This would select all charges for a specific guarantor that have personal balances. Payments would be applied beginning with the claims with the oldest DOS. The plug-in will continue paying claims until the payment amount is exhausted. If a patient payment amount still remains unapplied and there are no more claims with patient balances, then the residual amount will be reported in the Unapplied section of the log file in EDI Response Management. If no claims are identified with a patient balance, then no amount will be posted, and the amount will be reported in the Unapplied section of the log report in EDI Response Management.

*Limit Visits to Company   **Site specific** ☐ Select True or False

When payments are captured in the Smart Pay website, be it from the patient portal, the office back end portal, the IVR or lock box, the company associated to the statement identified to be paid will be included in the patient payment file. Payments that are auto posted from this file, can be applied to claims in the application that are outstanding for that company. Or, in the case that the practice has multiple companies setup in the application and patients are all shared among them, then if the practice decides to, you can have the payment apply to ANY visit for that guarantor that has an outstanding patient balance.

True - Limits the selection of visits that the patient payments can be applied to, to a specific company which is mentioned under H1 segment of patient payment file.

False – Any visit for a guarantor with a patient balance outstanding, regardless of the company associate with it, will be eligible to have a payment applied to it. However, all things being equal, if one of the two visits are associated to the company that the payment is intended for in the payment file then that visit will be favored for payment over the other. Preference would be given to the company ID in the patient payment file, then to all other visits by oldest date of service first.

*Batch/File Level Process   **Site specific** ☐ Select True or False

Traditionally, when posting patient payments each guarantor has its own entry in a batch in transactions management. Every payment transaction that is successfully processed by the plug in will have a guarantor entry in the batch allowing users to track the successfully posted payments. These might show fully applied or some Unapplied funds; Unapplied might occur because of patient making an over payment and the setting to apply payment type is set to Don't allow credit balances or there are no claims with patient balances outstanding. However, there can also be a situation where the guarantor ID returned in the patient payment file could not find a match in the application e.g. QuickPay entries are manually entered and typos could occur. If that is the case, then these would only appear in the log file. Only entries where valid guarantors are found would show up in the batch. If a user does not follow the recommended workflow and find the unapplied funds in the log file, the batch could end up getting closed without accounting for all the unapplied funds.

Therefore, we are including the option to create a batch entry at the file level. This is similar to how Electronic Remittance Advices (ERA) files are processed.

Payer	Batch	Source	Payment	Adjustme	Transfer	Un-applied Funds	# of Items	Document #	Date	Deposit Date
Unapplied file 1	pawan	Patient	800.00	0.00	0.00	200.00	1		10/16/2019	10/16/2019
Total			800.00	0.00	0.00	200.00	1			

In this case the Payer is the Patient Payment file name that was processed. There would be one line for all the transactions in that file. Users could drill into that line to see the claims that payments were applied to. Additionally, we are now able to record the posted amount and compare that to the paid amount for the file.

If there were any funds that were not applied the payment poster would now be required to reconcile the unapplied funds before they could close their batch.

Also, since the payment method is captured for the file as a whole, there will be a need for the EDI clearinghouse to split the patient payment file out by payment type in order to record a correct value for the collection of payments in that batch.

For instance, here is a screen shot of the Payment Entry screen. In this example there is only one place to indicate that the method of payment to all the entries in this batch is Check. In the case of an ERA file, there is one check number for multiple claim payments. However, in the case of patient payments, each guarantor would typically have a unique check number. Since there is only one spot for a check number and since each guarantor would have their own check number, we are unable to enter a check number here as it would not apply to all the payments in the same file. Therefore, if we select this option, we could still know that the payment was a check but we would not be able to record the check number.

Here are the Pros and Cons for each method:

Posting by Guarantor:

Pro: All the details of the payment are kept.

The name of the payer is the guarantor's name.

Con: Unapplied funds may not show up in the batch details and the batch could be closed without accounting for all the payments.

Posting at a File level:

Pro: Total file payment and amount posted are recorded in the batch details ensuring that the batch cannot be closed until all unapplied funds are accounted for.

Con: The payment file will need to be split by payment type in order to enter valid information in payment entry record. However, some payment method data will be lost as it would not necessarily apply to all the payments in the same batch: i.e. Check number, Credit Card number.

True - payment process will happen based on batch/file level process.

False - payment process will be based on guarantors and not at batch/file level process.

Note: The total payment for the file is not always tracked in the batch, so there could be unapplied funds that can only be identified from reviewing the posting results log file.

4. Click **OK** to save your changes and return to the Edit Clearinghouse Settings window.

5. Click **OK** to close the **Edit Clearinghouse Settings** window.

6. Click **Close** to close the **Find Clearinghouse** window.

7. Click **OK** to return to the Administration - Application window.

Patient Payment Auto Post Workflow

1. Login to the athenaPractice client.

2. From the main menu, click the **EDI Response Management** button.
   EDI Response Management Criteria window displays

3. From **Clearinghouse** field, select **PatientPaymentAutoPost**.

4. Enter date received, then click **OK**.
   EDI Response Management window displays

5. Click the **Retrieve** button to get the PatientPayment file from the server.
   Message appear stating transmission successful.

   Note: If transmission failed where there were no files in the server, a message file will download and appear in the EDI Response Management window.
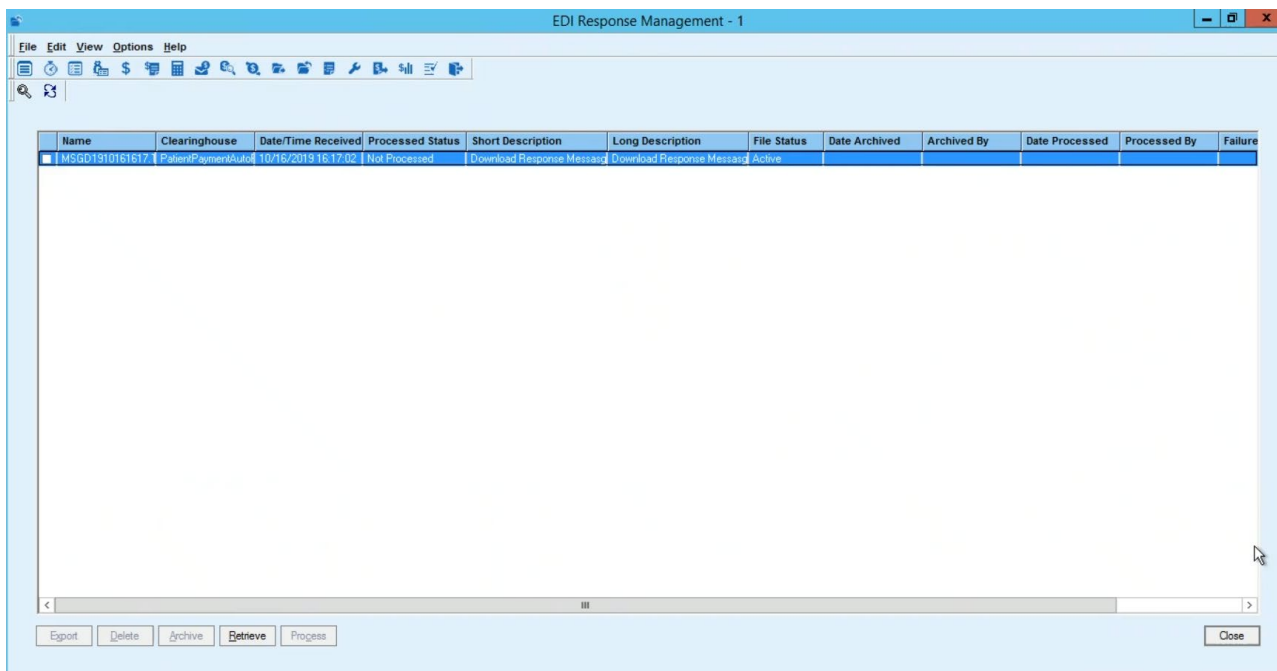
Select the file, right-click, and click **View.**
The file open.
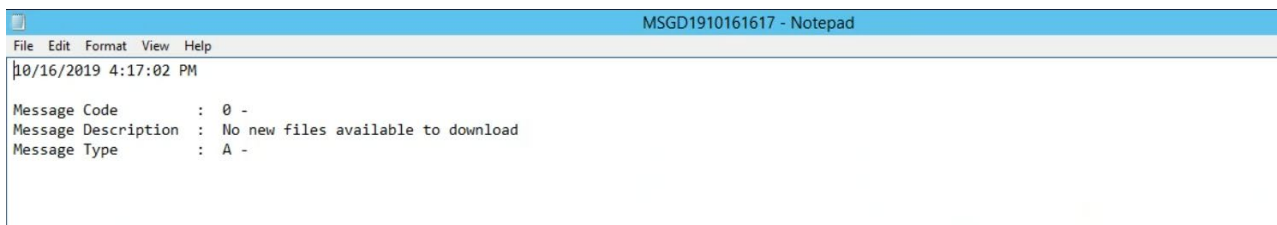
6. If there was a file that was successfully retrieved, you'll see a successful transmission message. Close the successful transmission message window, click the **Refresh** button. PatientPayment file appear with "Not Processed" status

7. Select the PatientPayment file, click **Process** button.

8. Click **Yes** to message box "Are you sure you want to process the checked report files?"

9. Click **OK** to message box "Please select a batch for patient payment auto post."

10. From Find Batch window, create a new batch or select an existing batch.

Note: for multiple PatientPayment files process at the same time, a batch file will need to be created for each PatientPayment file.

11. Click **OK** on the Find Batch window.

12. Click **OK** to message "Payment processing completed for selected file(s)."
    Note: If the payment processed failed, see Troubleshooting section.
    EDI Response Management window displays

13. Verify PatientPayment file appeared with status "Processed Without Errors."

14. Click **Close** button.

15. From the main menu screen, click on **Transaction Management**.
    Transaction Management Criteria screen displays

16. In the Batch field, click on **binocular** icon.
    Find Batch screen displays

17. Find the batch file, select the batch in the grid, and click **OK.**
    Transaction Management Criteria screen displays

18. Verify the batch appear in the **Batch** field and click **OK.**
    Transaction Management screen displays

19. Double click on the batch file and verify the payment got posted correctly.
    Note: Payments will be applied to visits First-in, First-out… meaning that the oldest claims with patient balances are identified first for payment. If the payment amount is larger than the amount paid on the first claim, then next claim for that guarantor with a patient balance will be identified for payments.

20. Another way to check the payment is go to the PatientPayment file (right click on the file in step 13 and click **View**), open it using Notepad or Notepad++ view the data and compare back to here to make sure they are posting correctly. If you are familiar with posting ERA files, this would be the equivalent of using your EOB to verify that all the payments posted correctly.

The format for PatientPayment file is as follows:

A - Guarantor ID
B - Paid amount (assumed decimal for last 2 digits)
C - Guarantor Name
D - Client short name and Paid Service ID (company or provider ID depending if statements
   are generated by company or provider)
E - Payment Method
F - Check or Credit Card number
G - Payment Type (PER regular payment, PRE prepayment (deposits), COP Copay)

21. Close the PatientPayment file.

# File Level and Guarantor Batch Workflows

File Level Batch

1. If Batch/File Process is set to **True** in **Payment Auto Post File Process Settings** window in Administration. **Note:** this setting requires that the payment file be split by payment type. If you are to create a batch at the file level, the file must be all for the same payment type. Contact your EDI Implementation specialist to have the files setup to split by payment type.

2. Login to the athenaPractice client.

3. From the main menu window, click the **EDI Response Management** button.
   EDI Response Management Criteria window displays

4. Enter date received, then click **OK**.
   EDI Response Management window displays

5. Click the **Retrieve** button.
   Find Clearinghouse window displays

6. Search for the PatientPaymentAutoPost Plug in and select it.
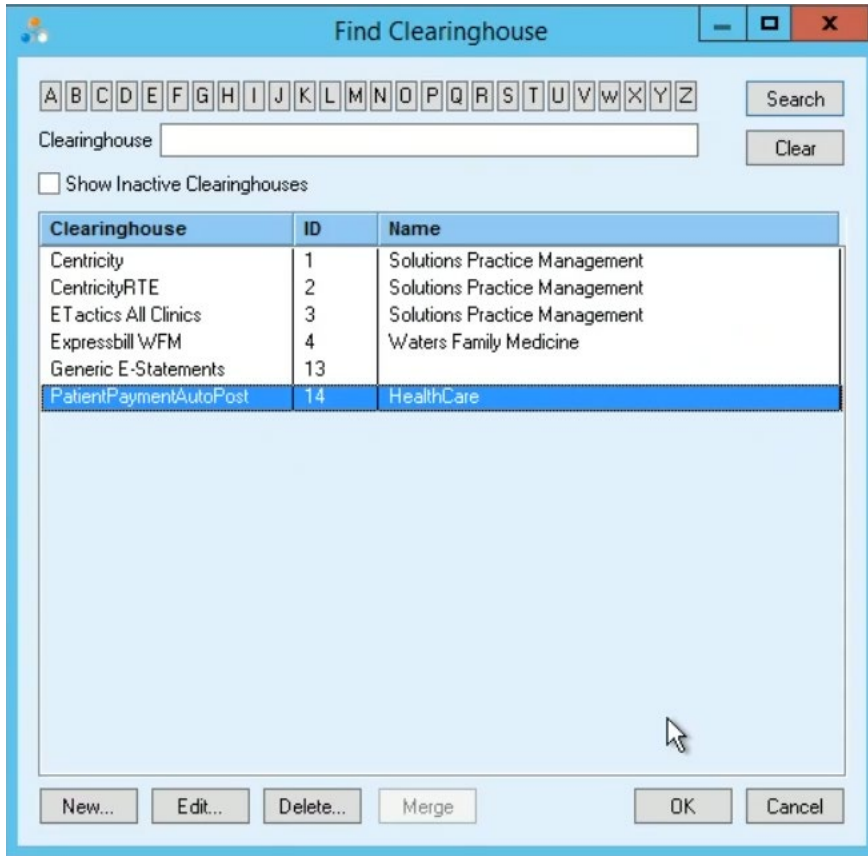
7. Click **OK**
   Message window appear stating transmission successful.

8. Click the **Refresh** button.
   PatientPayment file appear with "Not Processed" status
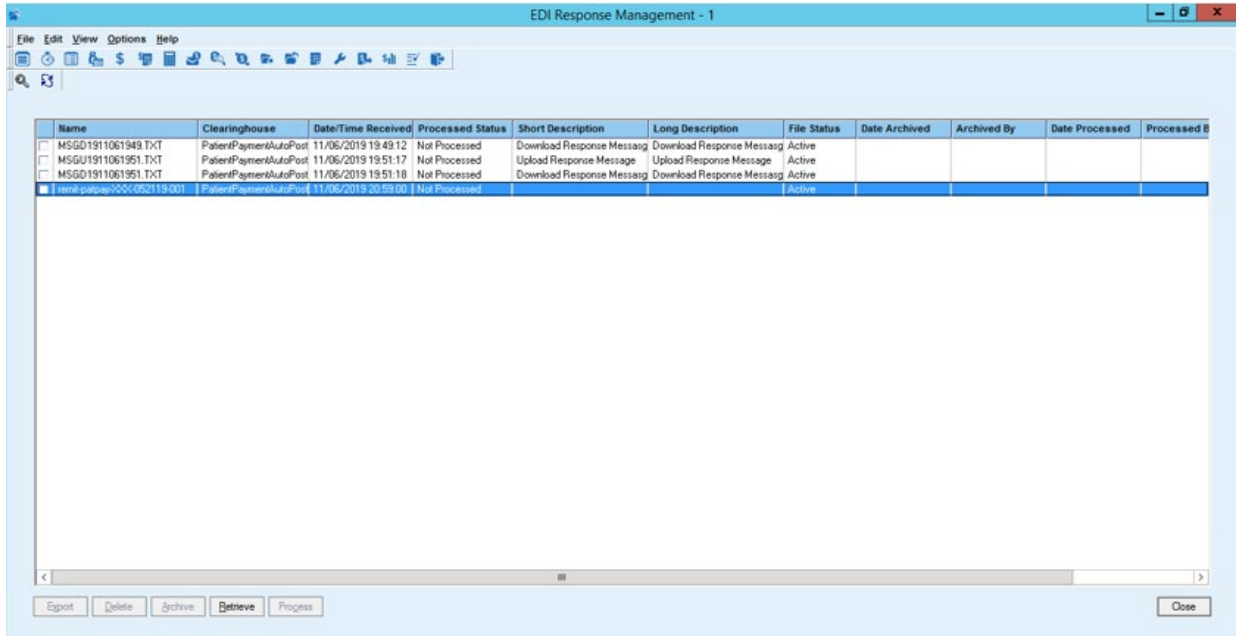
9. Select the PatientPayment file, click **Process** button.

10. Click **Yes** to message box "Are you sure you want to process the checked report files?"

11. Click **OK** to message box "Please select a batch for patient payment auto post."

12. From Find Batch window, create a new batch or select an existing batch.

13. Click **OK** on the Find Batch window.

14. Click **OK** to message "Payment processing completed for selected file(s)."
EDI Response Management window displays

15. Click the **Refresh** button.
Log file appear

    Note: If you have an amount that is unapplied, you must go to the log file and reconcile it manually.

16. Select the log file, right click, and select **View**.

Log file displays

17. Click **Close** button.

18. From the main menu screen, click on **Transaction Management.**
    Transaction Management Criteria window displays

19. In the Batch field, click on **binocular** icon.
    Find Batch screen window displays

20. Find the batch file, select the batch in the grid, and click **OK.**
    Transaction Management Criteria window displays

21. Verify the batch appear in the **Batch** field and click **OK.**

Transaction Management screen displays
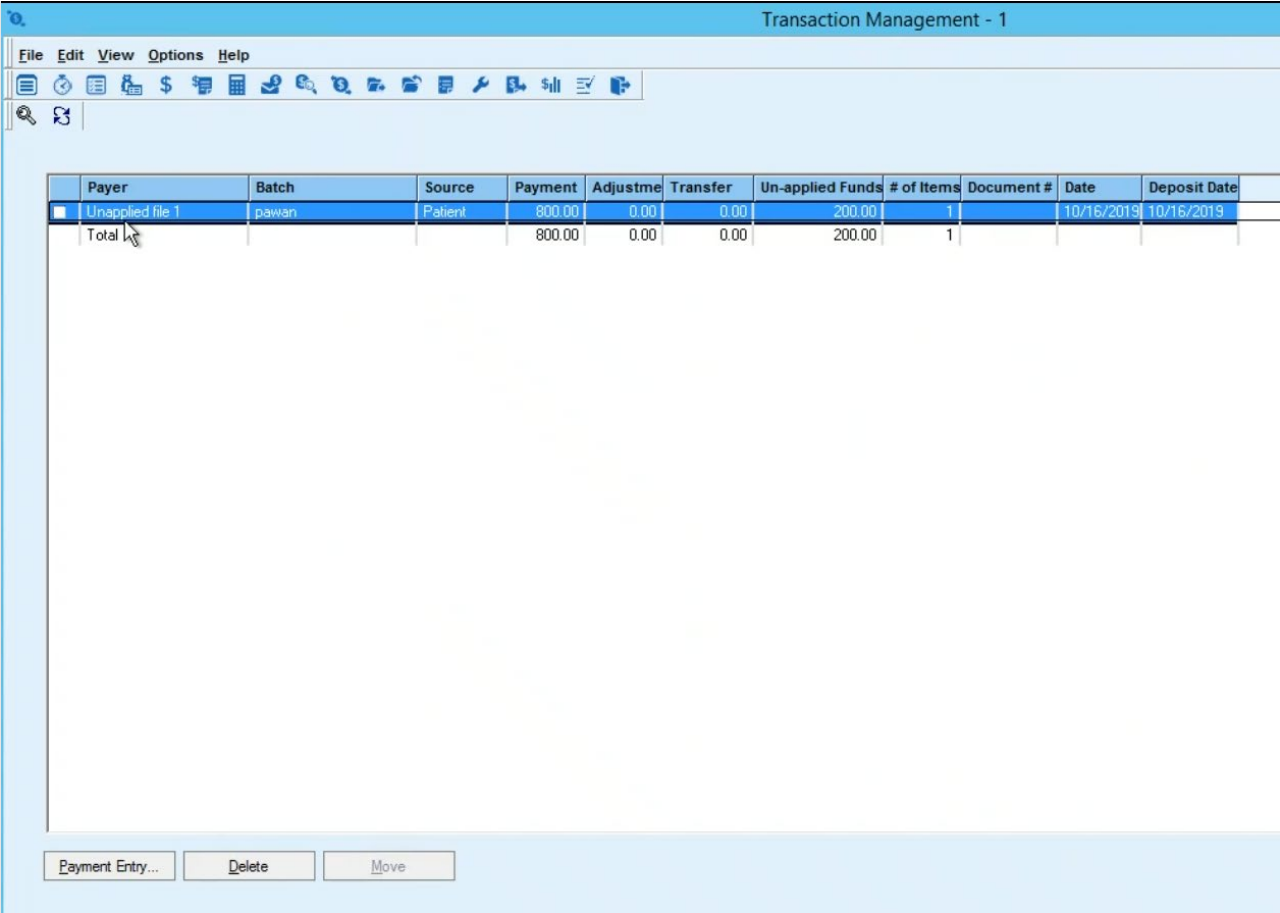
22. Double click on the batch file and verify Payer show batch file level.
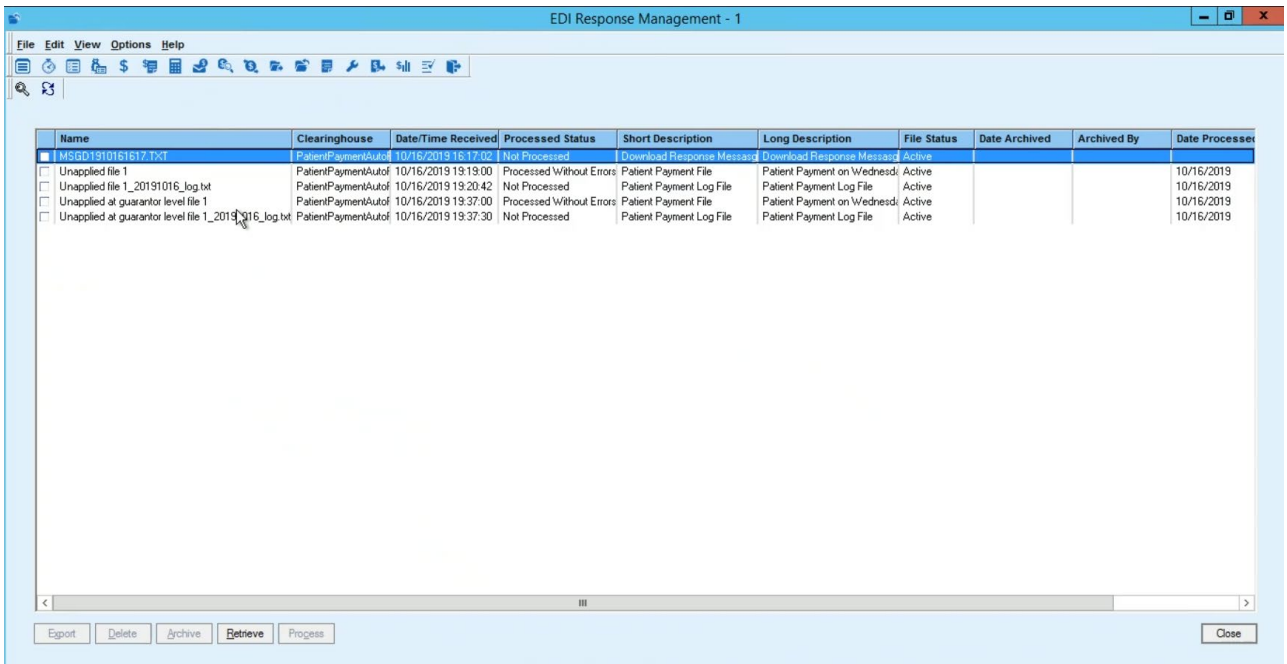
Payment Entry window displays
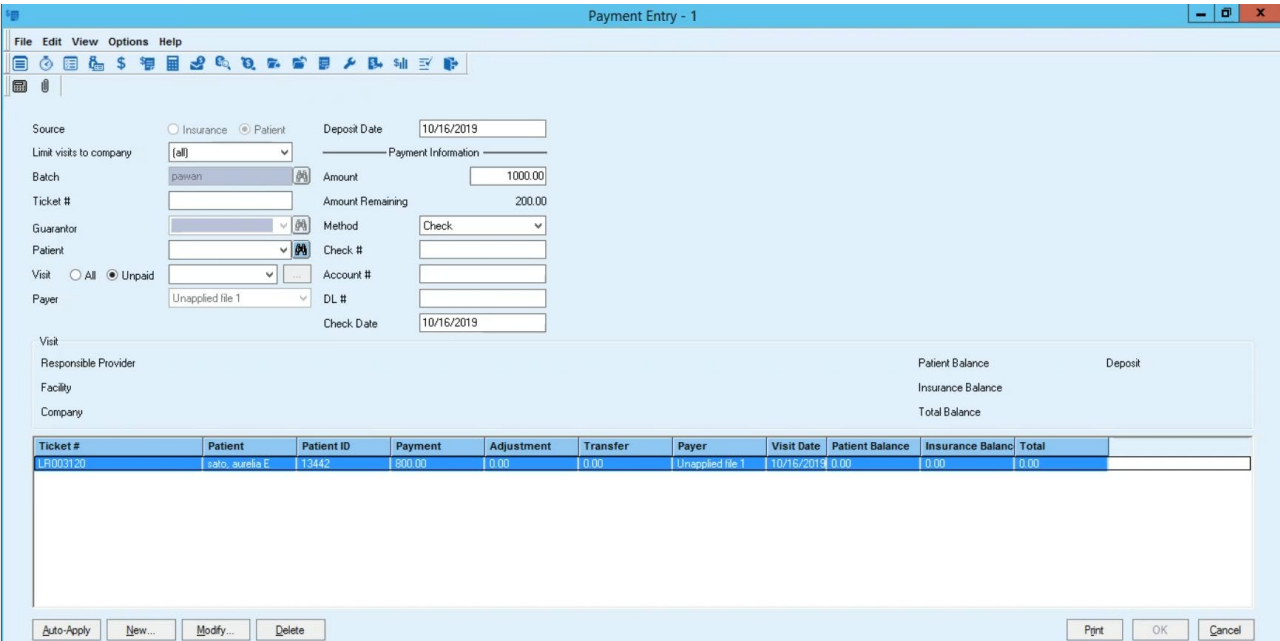
Another way to check the payment and updated balance is go to the PatientPayment file, open it using Notepad or Notepad++ and view the data and compare back to here to make sure they are posting correctly.

Guarantor Level Batch

1. If Batch/File Process is set to False in **Payment Auto Post File Process Settings** window in Administration.

2. Follow the same steps as above to retrieve the charges and process the file (steps 2 to 13).

3. Click the **Refresh** button.
   Log file appear.

4. Select the log file, right click and select **View**.
   Note: Review the unapplied payments for manual reconciliation before you close the file.

Log file display

```
remit-patpay-XXX-052119-008_20191107_log - Notepad
File  Edit  Format  View  Help
Current Date: Thursday, November 7, 2019

Parsing status : Successful!

Processed File: remit-patpay-XXX-052119-008    Payment Process Batch Name : Duncan_20191107

Company Details : WFM 32   Limit Visit To Company : False   Batch/File Level Process : False
*********-------------------------------------------Unapplied Payment details---------------------------------------------*********
*** Ticket Number  : LR00311    Guarantor Id : 13193

            Payment Status : Failed in payment process : Incorrect guarantor/ticket details.

            Guarantor Id    : 13193         Guarantor Name : elise  allebach

            Check #         :             Card #         :              Process Date : 11/07/2019     Payment Mode : CASH

            Service Date    : 10/03/2019   PaymentType    : COP          Payment Processing Type : eCashiering

            Total Paid Amount : $120.00            Applied Amount : $0.00    Unapplied Amount : $120.00

            Transaction Type : Payment

            --------------------------------*********--------------------------------

*********-------------------------------------------Applied Payment details---------------------------------------------*********
*** Ticket Number  : LR003110   Guarantor Id : 13193

            Payment Status : Payment record processed successfully.

            Guarantor Id    : 13193         Guarantor Name : elise  allebach

            Check #         :             Card # :              Process Date : 11/07/2019     Payment Mode : CASH

            Service Date    : 10/03/2019   PaymentType : COP        Payment Processing Type : eCashiering

            Total Paid Amount : $90.00            Applied Amount : $90.00        Unapplied Amount : $0.00

            Transaction Type : Payment

            --------------------------------*********--------------------------------
*** Ticket Number  : LR003110   Guarantor Id : 13193

            Payment Status : Payment record processed successfully.

            Guarantor Id    : 13193         Guarantor Name : elise  allebach

            Check #         :             Card # :              Process Date : 11/07/2019     Payment Mode : CASH

            Service Date    : 10/03/2019   PaymentType : COP        Payment Processing Type : eCashiering

            Total Paid Amount : $800.00            Applied Amount : $800.00        Unapplied Amount : $0.00

            Transaction Type : Payment
```

```
                          --------------------------------*********--------------------------------
*** Ticket Number | : WMT002054   Guarantor Id : 17810

              Payment Status : Payment record processed successfully.

              Guarantor Id   : 17810          Guarantor Name : guadalupe  markowski

              Check #        :                Card # : 9988        Process Date : 11/07/2019    Payment Mode : VSA

              Service Date   : 09/09/2019     PaymentType : COP     Payment Processing Type : eCashiering

              Total Paid Amount : $50.00              Applied Amount : $50.00        Unapplied Amount : $0.00

              Transaction Type : Payment

                          --------------------------------*********--------------------------------
*** Ticket Number  : WMT002054   Guarantor Id : 17810

              Payment Status : Payment record processed successfully.

              Guarantor Id   : 17810          Guarantor Name : guadalupe  markowski

              Check #        :                Card # : 2233        Process Date : 11/07/2019    Payment Mode : VSA

              Service Date   : 09/09/2019     PaymentType : COP     Payment Processing Type : eCashiering

              Total Paid Amount : $50.00              Applied Amount : $50.00        Unapplied Amount : $0.00

              Transaction Type : Payment

                          --------------------------------*********--------------------------------
*** Ticket Number  : WF010402    Guarantor Id : 3296

              Payment Status : Payment record processed successfully.

              Guarantor Id   : 3296           Guarantor Name : liana  forck

              Check #        : 264745         Card # :            Process Date : 11/07/2019    Payment Mode : CHK

              Service Date   : 10/07/2019     PaymentType : PER     Payment Processing Type : Quickpay

              Total Paid Amount : $20.00              Applied Amount : $20.00        Unapplied Amount : $0.00

              Transaction Type : Payment

                          --------------------------------*********--------------------------------
                          --------------------------------*********--------------------------------
*** Ticket Number  : WF010402    Guarantor Id : 3296

              Payment Status : Payment record processed successfully.

              Guarantor Id   : 3296           Guarantor Name : liana  forck

              Check #        : 124587         Card # :            Process Date : 11/07/2019    Payment Mode : CHK

              Service Date   : 10/07/2019     PaymentType : PER     Payment Processing Type : Quickpay

              Total Paid Amount : $20.00              Applied Amount : $20.00        Unapplied Amount : $0.00

              Transaction Type : Payment

                          --------------------------------*********--------------------------------
*********--------------------------------------------------------END--------------------------------------------------------*********

******* Transactions Summary as on 11/7/2019 8:56:45 PM*************

Total Amount in File :  $1150

        ****** Payment Transactions ******

Total Amount Unapplied :  $120.00

Total Amount Applied :  $1030.00
```

5. Click **Close** button. **Note:** Before you close the log file, we suggest checking for unapplied payments for manual reconciliation.

6. From the main menu screen, click on **Transaction Management.**
   Transaction Management Criteria screen display

7. In the Batch field, click on **binocular** icon
   Find Batch screen appear

8. Find the batch file, select the batch in the grid, and click **OK**
   Transaction Management Criteria screen appear

9. Verify the batch appear in the **Batch** field and click **OK**
   Transaction Management screen display

10. Double click on the batch file and verify payer show guarantor.

11. Another way to check the payment and updated balance is go to the PatientPayment file, open it using Notepad or Notepad++ view the data and compare back to here to make sure they are posting correctly.

Deposit Workflows

Prepay type with date of service or ticket number
Deposits occur in athenaPractice when a payment needs to be recorded but there are no charges to post against, at this time. For instance, a patient might be seen for an office visit and upon checking out they could make a copayment. Or a patient may schedule a procedure for a later time and may want to put a deposit ahead of time. In either case, there may not yet be any procedure to post against. Deposits may be recorded by the practice, using the Smart Pay website, by identifying the transaction type of Pre-Payment and including the visit ticket number that we want to apply the deposit to.

This is what the field labels mean: Name = Guarantor's Name, Account Number = Guarantor's ID, Sub Account Number = Ticket number we want the deposit to be applied to, Payment Type field select Pre-Payment for a deposit. When the payment file comes back to processed in athenaPractice, with the type of Pre-Payment and the Ticket number supplied, the deposit will be posted if at the time of posting there are still no procedures entered on the visit. If procedures are added to the visit between the time the payment is recorded on the website and when the payment file is received and processed, the payment will be applied like a regular payment to that visit, instead of a deposit.

Deposits, at this time will need to have ticket number in order to post. If no ticket number exists for the visit, then the funds will be unassigned. Also, if there is a ticket number but the type is not Pre-Payment, then the funds will attempt to pay that specific visit. If there are no charges it will not post as a deposit but instead be unapplied for manual posting.

Lastly, if there are charges waiting to be retrieved from the application a deposit will not be taken as that will permanently discard the retrieval data. The transaction will also go to unapplied.

1. Follow the same steps as above to retrieve the charges and process the file (steps 2 to 13).

2. Click the **Refresh** button
   Log file appear

3. Select the log file, right click, and select **View**.

4. In the Log file, verify the information like Applied Payment details.

5. Another way to check the payment and updated balance is go to the PatientPayment file, open it using Notepad or Notepad++ view the data and compare back to here to make sure they are posting correctly.

Prepay type with no date of service or ticket number

1. Login to the client

2. From the main menu, click the **EDI Response Management** button.

EDI Response Management Criteria window displays

3. Enter date received, then click **OK**.
   EDI Response Management window displays

4. Click the **Retrieve** button to get the PatientPayment file from the server.
   Message appear stating transmission successful.

5. Click the **Refresh** button.
   PatientPayment file appear with "Not Processed" status

6. Select the PatientPayment file, click **Process** button.

7. Click **Yes** to message box "Are you sure you want to process the checked report files?"

8. Click **OK** to message box "Please select a batch for patient payment auto post."

9. From Find Batch window, create a new batch or select an existing batch

10. Click **OK** on the Find Batch window.

11. Click **OK** to message "Payment processing completed for selected file(s)."
    EDI Response Management window displays

12. Click the **Refresh** button
    Log file appear

Select the log file, right click and select **View**.

Log file display
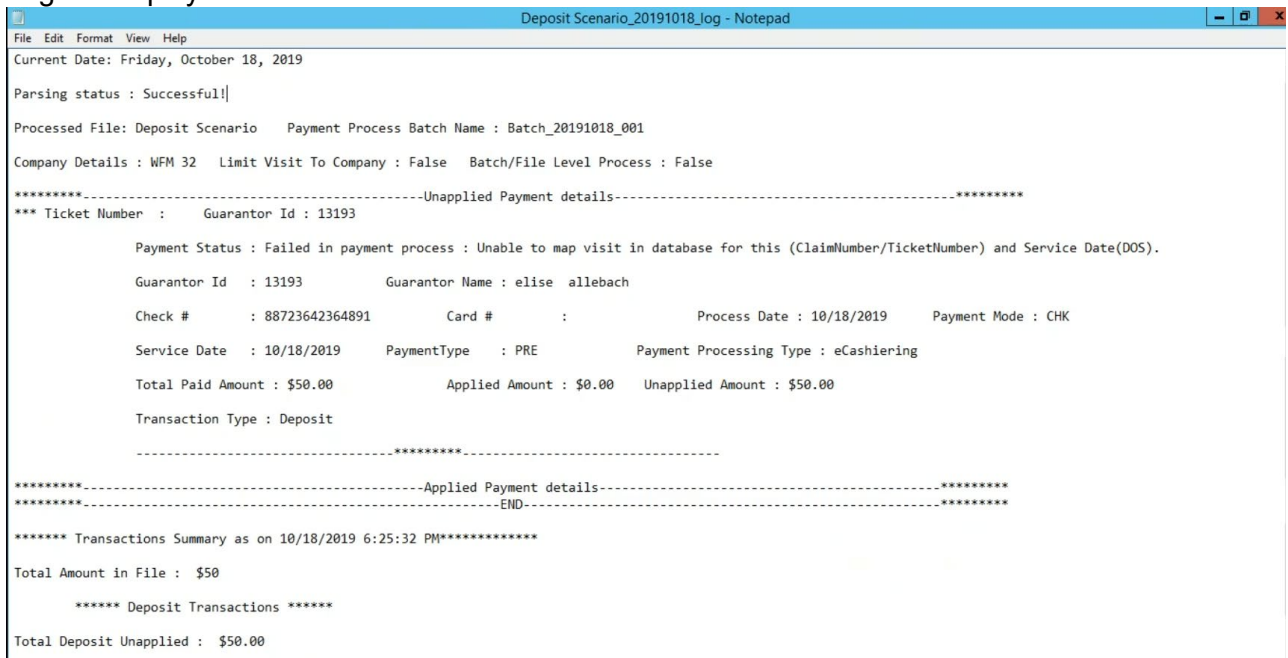
Note: When there are multiple visits, the deposit will be applied to the most recent one.

13. Another way to check the payment and updated balance is go to the PatientPayment file, open it using Notepad or Notepad++ view the data and compare back to here to make sure they are posting correctly.
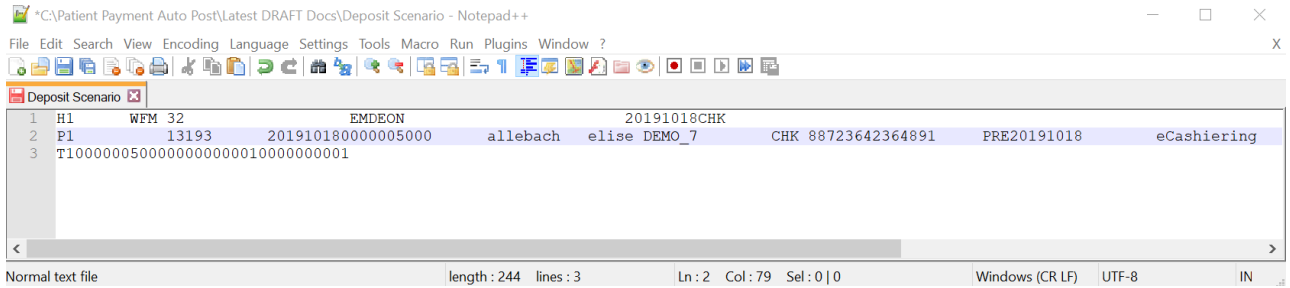
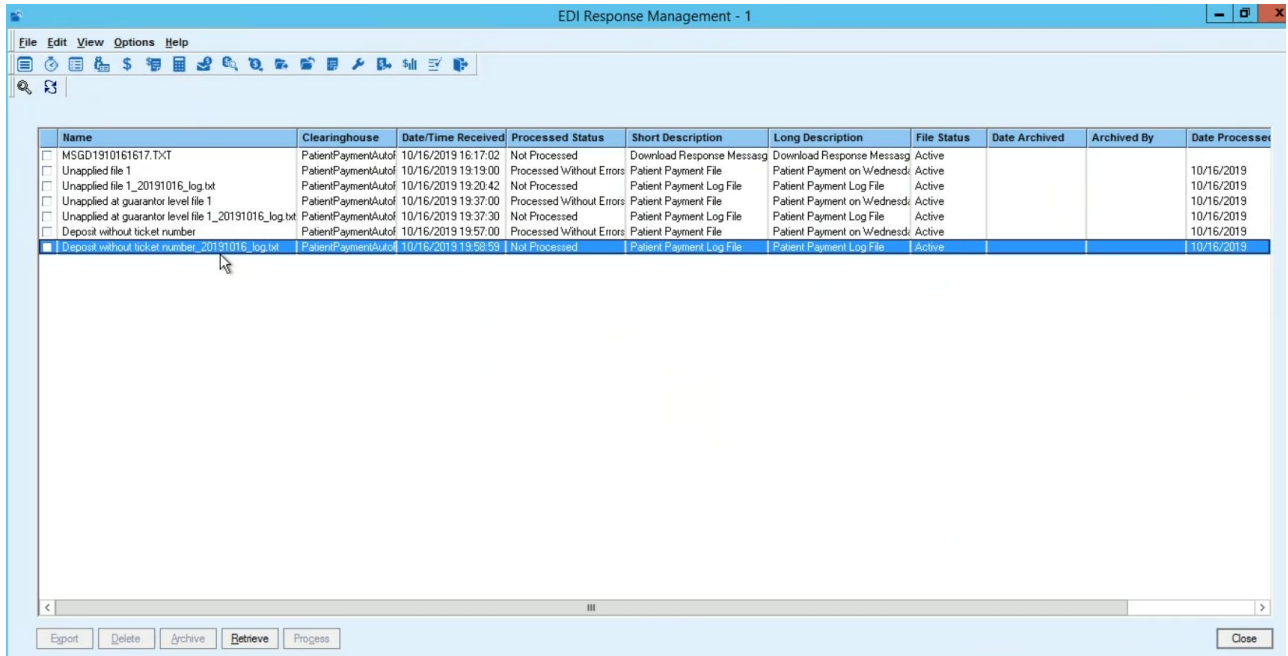# Refund Workflows

Void or Refund on Electronic Transaction

Refunds will be applied as a Last-In/First-Out order, which is the reverse order of payments. If a file contains payments and refunds, the payments will all be applied first, then the refunds will be applied.

1. Login to the client

2. From the main menu screen, click the **Billing** button, and go to Billing screen

3. From the main menu screen, click the **EDI Response Management** button.

EDI Response Management Criteria window displays

4. Enter date received, then click **OK**.
   EDI Response Management window displays

5. Click the **Retrieve** button to get the PatientPayment file from the server.
   Message appear stating transmission successful.

6. Click the **Refresh** button.
   PatientPayment file appear with "Not Processed" status

7. Select the PatientPayment file, click **Process** button.

8. Click **Yes** to message box "Are you sure you want to process the checked report files?"

9. Click **OK** to message box "Please select a batch for patient payment auto post."

10. From Find Batch window, create a new batch or select an existing batch

11. Click **OK** on the **Find Batch** window.

12. Click **OK** to message "Payment processing completed for selected file(s)."
    EDI Response Management window displays

13. Click the **Refresh** button
    Log file displays

14. Select the log file, right click, and click **View**.

15. In the log file, review the information Unapplied and Applied Payment details.

remit-patpay-XXX-052119-007_20191107_log - Notepad

File   Edit   Format   View   Help

Current Date: Thursday, November 7, 2019

Parsing status : Successful!

Processed File: remit-patpay-XXX-052119-007   Payment Process Batch Name : Duncan_20191107

Company Details : WFM 32   Limit Visit To Company : False   Batch/File Level Process : False

*********---Unapplied Payment details---*********
*** Ticket Number : LR003123   Guarantor Id : 13193

            Payment Status : Payment record processed successfully.

            Guarantor Id   : 13193   Guarantor Name : elise allebach

            Check #   :   Card #   :   Process Date : 11/07/2019   Payment Mode : CASH

            Service Date   : 10/03/2019   PaymentType   : COP   Payment Processing Type : eCashiering

            Total Paid Amount : $-2000.00   Applied Amount : $0.00   Unapplied Amount : $-1695.35

            Transaction Type : Refund

            --------------------------------*********--------------------------------

*********---Applied Payment details---*********
*** Ticket Number : LR003110   Guarantor Id : 13193

            Payment Status : Payment record processed successfully.

            Guarantor Id   : 13193   Guarantor Name : elise allebach

            Check #   :   Card # :   Process Date : 11/07/2019   Payment Mode : CASH

            Service Date   : 10/03/2019   PaymentType : COP   Payment Processing Type : eCashiering

            Total Paid Amount : $165.00   Applied Amount : $165.00   Unapplied Amount : $0.00

            Transaction Type : Payment

            --------------------------------*********--------------------------------
*** Ticket Number : LR003110   Guarantor Id : 13193

            Payment Status : Payment record processed successfully.

            Guarantor Id   : 13193   Guarantor Name : elise allebach

            Check #   :   Card # :   Process Date : 11/07/2019   Payment Mode : CASH

            Service Date   : 10/03/2019   PaymentType : COP   Payment Processing Type : eCashiering

            Total Paid Amount : $-2000.00   Applied Amount : $-100.00   Unapplied Amount : $0.00

            Transaction Type : Refund

            Note : Remaining balance either applied to next ticket or unapplied. Remaining balance amount is $: -1900.00

```
                         ----------------------------*********----------------------------------
*** Ticket Number  : 035228      Guarantor Id : 13193

            Payment Status : Payment record processed successfully.

            Guarantor Id   : 13193          Guarantor Name : elise  allebach

            Check #        :               Card # :           Process Date : 11/07/2019     Payment Mode : CASH

            Service Date   : 10/03/2019    PaymentType : COP     Payment Processing Type : eCashiering

            Total Paid Amount : $-2000.00      Applied Amount : $-10.00      Unapplied Amount : $0.00

            Transaction Type : Refund

            Note : Remaining balance either applied to next ticket or unapplied. Remaining balance amount is $ : -1890.00

                         ----------------------------*********----------------------------------
*** Ticket Number  : LR003108    Guarantor Id : 13193

            Payment Status : Payment record processed successfully.

            Guarantor Id   : 13193          Guarantor Name : elise  allebach

            Check #        :               Card # :           Process Date : 11/07/2019     Payment Mode : CASH

            Service Date   : 10/03/2019    PaymentType : COP     Payment Processing Type : eCashiering

            Total Paid Amount : $-2000.00      Applied Amount : $-111.00      Unapplied Amount : $0.00

            Transaction Type : Refund

            Note : Remaining balance either applied to next ticket or unapplied. Remaining balance amount is $ : -1779.00

                         ----------------------------*********----------------------------------
*** Ticket Number  : LR003111    Guarantor Id : 13193

            Payment Status : Payment record processed successfully.

            Guarantor Id   : 13193          Guarantor Name : elise  allebach

            Check #        :               Card # :           Process Date : 11/07/2019     Payment Mode : CASH

            Service Date   : 10/03/2019    PaymentType : COP     Payment Processing Type : eCashiering

            Total Paid Amount : $-2000.00      Applied Amount : $-33.65      Unapplied Amount : $0.00

            Transaction Type : Refund

            Note : Remaining balance either applied to next ticket or unapplied. Remaining balance amount is $ : -1745.35
```

```
                         --------------------------------*********--------------------------------
*** |Ticket Number  : LR003123    Guarantor Id : 13193

           Payment Status : Payment record processed successfully.

           Guarantor Id   : 13193            Guarantor Name : elise  allebach

           Check #        :              Card # :            Process Date : 11/07/2019      Payment Mode : CASH

           Service Date   : 10/03/2019    PaymentType : COP        Payment Processing Type : eCashiering

           Total Paid Amount : $-2000.00         Applied Amount : $-50.00        Unapplied Amount : $0.00

           Transaction Type : Refund

           Note : Remaining balance either applied to next ticket or unapplied. Remaining balance amount is $ : -1695.35

           --------------------------------*********--------------------------------
*********----------------------------------------------------END----------------------------------------------------*********

******* Transactions Summary as on 11/7/2019 8:34:07 PM*************

Total Amount in File :   $-1835

      ****** Payment Transactions ******

Total Amount Unapplied :   $0.00

Total Amount Applied :   $165.00

      ****** Refund Transactions ******

Total Refund Unapplied :   $-1695.35

Total Refund Applied :   $-304.65
```

16. Close the log file.

17. Click **Close** button on **EDI Response Management** screen.

18. From the main menu screen, click on **Transaction Management.**
    Transaction Management Criteria window displays

19. In the Batch field, click on **binocular** icon.
    Find Batch screen displays

20. Find the batch file, select the batch in the grid, and click **OK.**
    Transaction Management Criteria screen appear

21. Verify the batch appear in the **Batch** field and click **OK.**
    Transaction Management screen display

22. Double click on the batch file

23. Review Payment Entry window

24. Another way to check the payment and updated balance is go to the PatientPayment file, open it using Notepad or Notepad++ view the data and compare back to here to make sure they are posting correctly.

Limit Visits to Company

1. Login to the client

2. If Limit Visits To Company is set to True in the Payment Auto Post File Processing Setting screen in Administration module.
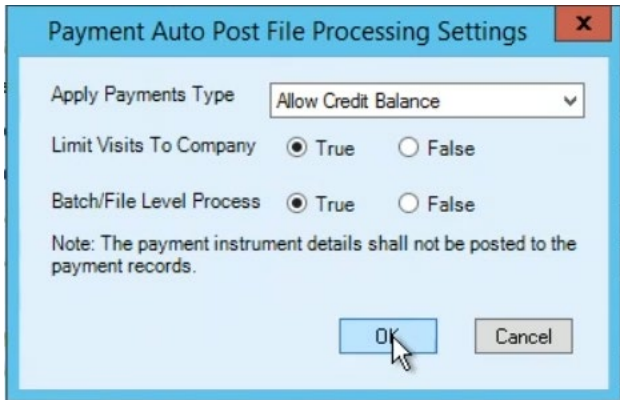
Note: If the setting to Limit Visits to Company equals True, then payment record of payment file should get paid only to specific company, which is mentioned under H1 segment of PatientPayment file.

From the main menu screen, click the **Billing** button, and view visit list. In the example below where guarantor has multiple companies.

3. From the main menu screen, click the **EDI Response Management** button.
   EDI Response Management Criteria window displays

4. Enter date received, then click **OK**.
   EDI Response Management window displays

5. Click the **Retrieve** button to get the PatientPayment file from the server.
   Message appear stating transmission successful.

6. Click the **Refresh** button.

   PatientPayment file appear with "Not Processed" status

7. Select the PatientPayment file, click **Process** button.

8. The message box "Are you sure you want to process the checked report files?" display. Click
   Yes.

9. Click **OK** to message box "Please select a batch for patient payment auto post."

10. From Find Batch window, create a new batch or select an existing batch.

11. Click **OK** on the Find Batch window.

    Message window may appear stating "Failed in payment process: Guarantor does not belong to this company. Hence transaction cannot be processed for this guarantor. 13853"
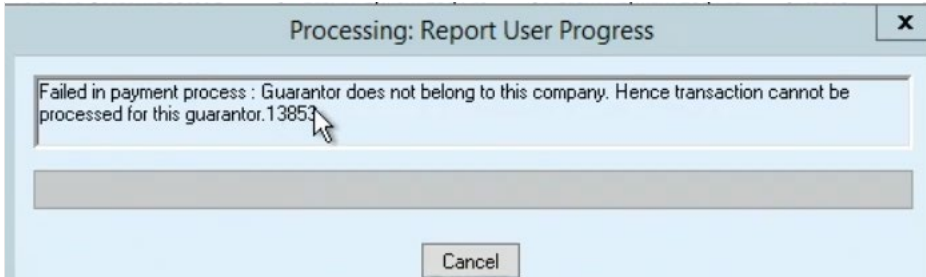
12. Click **Cancel**.

    Message window may appear stating the following:

13. Click **OK.**

14. Click **OK** to message "Payment processing completed for selected file(s)."

15. EDI Response Management window displays

16. Click the Refresh button
    Log file appear

17. Select the log file, right click, and click **View**.

18. In the log file, review the information Unapplied and Applied Payment details.

Scenario Refund 2_20191009_log - Notepad

File   Edit   Format   View   Help

```
Processed File: Scenario Refund 2    Payment Process Batch Name : Demo 9th Oct

Company Details : WFM 32    Limit Visit To Company : True    Batch/File Level Process : True
*********-----------------------------------------Unapplied Payment details------------------------------------------*********
*** Ticket Number  : LR002319    Guarantor Id : 13853

          Payment Status : Failed in payment process : Guarantor does not belong to this company. Hence transaction cannot be processed for this guarantor.

          Guarantor Id   : 13853        Guarantor Name : guadalupe  dubord

          Check #        : 88723642364897        Card #       :              Process Date : 10/09/2019    Payment Mode : CHK

          Service Date   : 10/07/2019    PaymentType   : COP          Payment Processing Type : Quickpay

          Total Paid Amount : $50        Applied Amount : $0      Unapplied Amount : $50

          Transaction Type : Payment

          --------------------------------*********--------------------------------
*** Ticket Number  : LR003113    Guarantor Id : 13853

          Payment Status : Failed in payment process : Guarantor does not belong to this company. Hence transaction cannot be processed for this guarantor.

          Guarantor Id   : 13853        Guarantor Name : guadalupe R dubord

          Check #        : 88723642364897        Card #       :              Process Date : 10/09/2019    Payment Mode : CHK

          Service Date   : 10/07/2019    PaymentType   : COP          Payment Processing Type : Quickpay

          Total Paid Amount : $-50        Applied Amount : $0      Unapplied Amount : $-50

          Transaction Type : Refund

          --------------------------------*********--------------------------------
*** Ticket Number  : LR003117    Guarantor Id : 13853

          Payment Status : Failed in payment process : Guarantor does not have any visit to apply payment/refund/deposit.

          Guarantor Id   : 13853        Guarantor Name : guadalupe R dubord

          Check #        : 88723642364897        Card #       :              Process Date : 10/09/2019    Payment Mode : CHK

          Service Date   : 10/07/2019    PaymentType   : COP          Payment Processing Type : Quickpay

          Total Paid Amount : $-30        Applied Amount : $0      Unapplied Amount : $-20

          Excess Refund Amount : $-20

          Transaction Type : Refund
```

```
*********-----------------------------------------Applied Payment details-------------------------------------------*********
*** Ticket Number  : LR003117    Guarantor Id : 13853

          Payment Status : Payment record processed successfully.

          Guarantor Id   : 13853          Guarantor Name : guadalupe R dubord

          Check #        : 88723642364897          Card # :              Process Date : 10/09/2019      Payment Mode : CHK

          Service Date   : 10/07/2019    PaymentType : COP        Payment Processing Type : Quickpay

          Total Paid Amount : $-30            Applied Amount : $-10    Unapplied Amount : $0

          Transaction Type : Refund

          Note : Remaining balance either applied to next ticket or unapplied. Remaining balance amount is $ : -20

          --------------------------------*********--------------------------------
*********-----------------------------------------------END-----------------------------------------------*********

******* Transactions Summary as on 10/9/2019 7:23:43 PM**************

Total Amount in File :  $-30

       ****** Payment Transactions ******

Total Amount Unapplied :  $50

Total Amount Applied :  $0

       ****** Refund Transactions ******

Total Refund Unapplied :  $-70

Total Refund Applied :  $-10
```

19. Close the log file.

20. Click **Close** button on EDI Response Management screen.

21. From the main menu screen, click on **Transaction Management**.
    Transaction Management Criteria screen display

22. In the Batch field, click on **binocular** icon.
    Find Batch screen appear

23. Find the batch file, select the batch in the grid, and click **OK.**
    Transaction Management Criteria screen appear

24. Verify the batch appear in the **Batch** field and click **OK.**
    Transaction Management screen displays

25. Double click on the batch file.
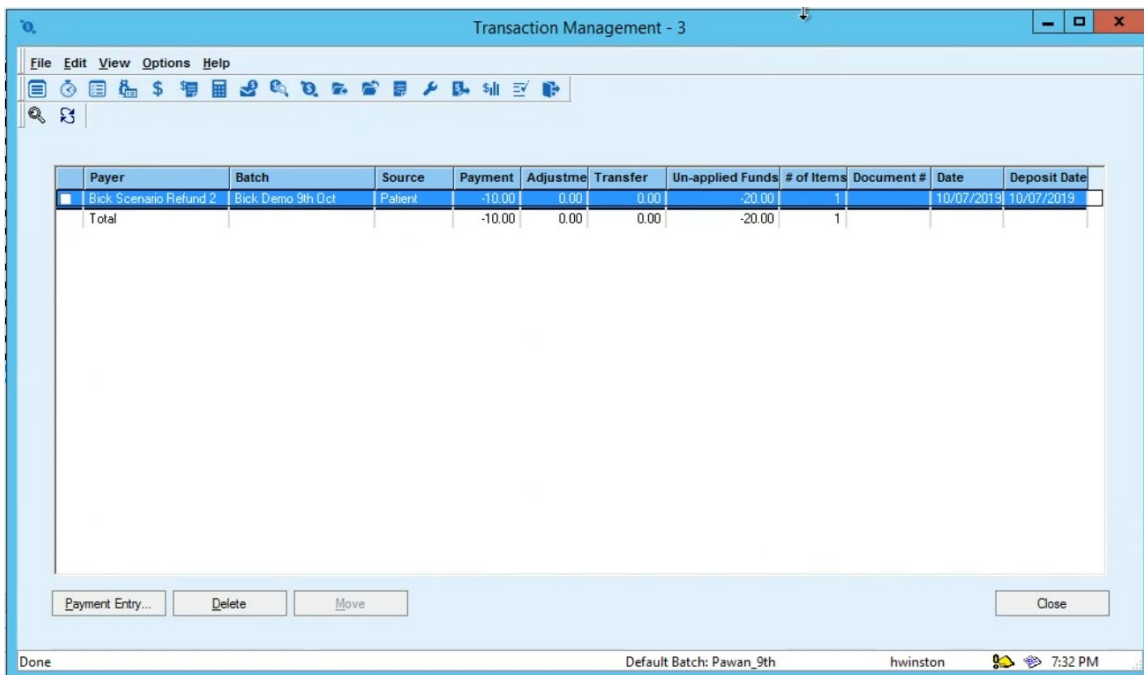
26. Review the information.
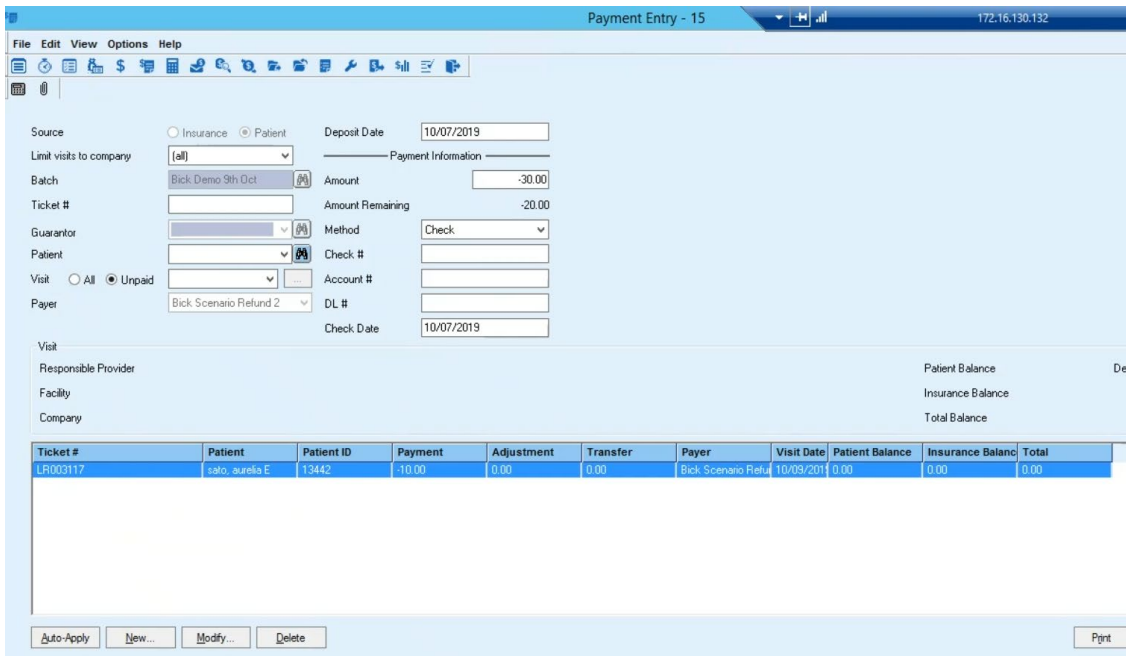
27. Another way to check the payment and updated balance is go to the PatientPayment file, open it using Notepad or Notepad++ view the data and compare back to here to make sure they are posting correctly.
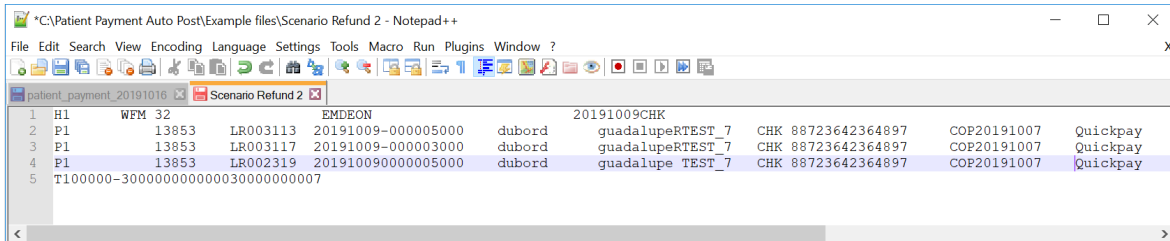
Troubleshooting

Payment Processing Exception

There are issues that might occur during payment processing.

If you see this message...	Then...
After you created a batch, you're prompted to refer to log files for more details because the payment processing failed for one or more guarantor(s). Another message may follow displaying the incorrect guarantor details guarantor id, first and last name.	There may be issues with guarantor information. From EDI Response Management window, open the Patient Payment log and look for guarantor details under Unapplied Payment details. There you will see the ticket number, patient status, guarantor ID, guarantor name, process date, and other information. **Note:** Anything under Unapplied Payment details will need to be posted manually.

Patient Payment log

Unapplied and Applied Payment details field descriptions on the Patient Payment log:

Payment Status: Will indicate if the payment posting was successful or if an error occurred. If there is an error, there will be a reason message.
Guarantor Id: Id used to match from payment file to the application.
Ticket Number: Ticket number that the payment was applied to.
Guarantor Id: Guarantor ID number that was used to identify claims for patient payments.
Guarantor Name: Guarantor Name from payment file.
Check #: Check number if payment is using Check method
Card #: Last 4 digits of the Credit Card number if payment type is Credit Card.
Process Date: Date that the payment file was processed in EDI Response Management
Payment Mode: possible values are: Cash, Chk, CreditCard (If file is split by type but not by individual CC company), Vsa (Visa), MCD (Master Card), AMX (American Express), DIS (Discover)
Service Date
Service Date: Service date from CHC payment portal
Payment Type: PER=Patient Balance, COP=Copay, POS=POS Collection, REP=Re Payment, COI=Co Ins, TPY=Time Payment, COL=Collections, BDP=Bad Debt POS, DIS=PTPL 10% DISCOUNT**Payment Processing Type:** IVR ,eLockBox, eCashiering, Patient Pay Online, Patient Pay Online- Quickpay
Total Paid Amount: amount that the guarantor paid and captured in Smart Pay.
Applied Amount: amount of the total paid amount which was applied to this ticket.
Unapplied Amount: total paid amount – Applied amount.

If you run into the following ...	Then...
If any feature of the plug-in is not working…	Check that the ADOBE.dll library file is on the client machine. If not found, you can download it from Microsoft website. Install the file or copy the dll in the system directory.
If there is a mismatch in deposit amount in Billing…	Run FixAggregate - <database name> (e.g. FixAggregate – Duncan) job. 1. Connect to SQL Server Management Studio 2. Go to SQL Server Agent and open Jobs folder 3. Select FixAggregate - <database name>, right click on it, and select Start Job at Step…

Getting Technical Support

If you require help, contact your Value Added Reseller or Services at 888-436-8491 or online via theathenaFlex Customer Portal Cases page.

Register to access the athenaFlex Customer Portal

1. Go to the athenaFlex Customer Portal main page and click **Register For An Account**.

2. Fill out the registration form, including all required fields (*).

3. Check one or more products in the list. (Select the product(s) you have licensed. At least one is required.)

4. Click **Register** to request access.

   You will receive an activation email approximately 24-48 hours later with instructions for logging in. Youruser name will be the email address you chose when registering.

   If you have questions or difficulty completing registration, contact Customer Service at 888-436-8491.

Join online communities

You can join online communities related to your product and features and view the latest communications,product postings, and other implementation resources.

1. Log in to the athenFlex Customer Portal for your product, and then click **Community**.

2. Under Resources, select **Available Communities**

3. Select **Join** for communication threads you want to follow. Select **Unjoin** to stop following. You'll receivea weekly digest email update when new items are posted to a community you joined.

4. To change how often to receive email updates, visit each joined community and click the **Weekly Digest**email icon the upper right corner. Then select a frequency: Weekly Digest (default), Daily Digest, Every Post, or Limited.

5. To view the latest communications online, log in and look under **Recent Content** or select a communityname.