

PAYMENTS, REFUNDS, VOIDING

RECEIVING PAYMENTS IN MI AND ZIRMED

1. From either the CLIPBOARD or the ESTIMATED PATIENT RESPONSIBILITY note how much the COPAY or DEDUCTIBLE/CO-INSURANCE payment is. If there is more than one exam find out how much each payment is for each exam.
2. Process Credit Card through Zirmed or enter check / cash
 - a. Select payments
 - b. Under PATIENT INFORMATION enter Last Name; First Name; Account Number; Appointment Number and Date of Service (this is the date of the exam – not necessarily the date that the payment is taken). The email address is optional.

ZirMed, Inc. [US] | <https://zpay.zirmed.com/VirtualTerminal>

Patient Information

*Last Name	*First Name	MI
TEST	AA-TEST	
*Account Number	*Appointment Number	
3018879	5012840	
Email Address	*Date of Service	
	11/14/2017	

- c. Under PATIENT PAYMENT INFORMATION enter amount, G/L account (this is the location at which you are taking the payment) and Payment Method.
 - i. **CREDIT / DEBIT CARDS**
 1. Enter Credit Card Number, Expiration Date, Billing Zip Code
 2. Enter Name on Card
 3. Add any Transaction Notes necessary
 4. Click on Collect Payment

Patient Payment Information

Single Payment | **Payment Plan**

*Amount	*G/L Account	
100.00	VRCMG Escondido - Escondido	
*Payment Method		
Credit/Debit Card	Swipe Card	
*Credit Card Number	*Expiration Date	*Billing ZIP Code
5555-5555-5555-5555	07 / 2023	92026
*Name on Card		
Jane Smith		
<input type="checkbox"/> Save Payment Method to Patient Center		
Transaction Note		Remove
As Necessary		

Collect Payment

ii. CASH (THIS INCLUDES CHECKS)

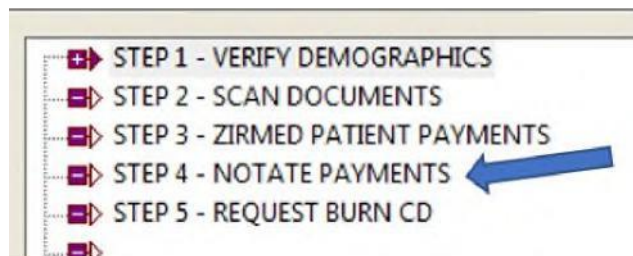
1. Select Cash or Check
2. For check enter Check number
3. Phone number is optional
4. Add any Transaction Notes necessary
5. Click on Collect Payment

The screenshot shows a web form titled "Patient Payment Information". It has two tabs: "Single Payment" (active) and "Payment Plan". The form contains the following fields and options:

- *Amount:** Text input field with "100.00".
- *G/L Account:** Dropdown menu with "VRCMG Escondido - Escondido".
- *Payment Method:** Dropdown menu with "Cash".
- *Form of Payment:** Radio buttons for "Cash" (unselected) and "Check" (selected).
- Check Number:** Text input field with "12345".
- Phone Number:** Text input field with "Optional".
- Transaction Note:** Text area with "As Necessary" and a "Remove" link.
- Collect Payment:** A blue button at the bottom.

iii. PAYMENT PLANS – this is NOT AVAILABLE in Zirmed. There is a paper form for this.

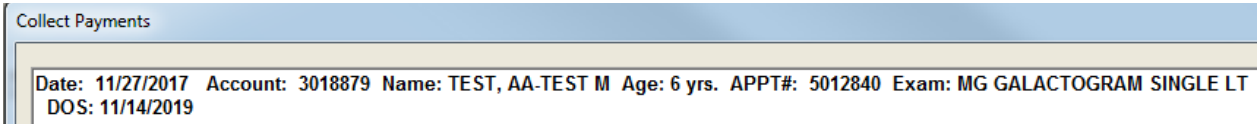
1. Not available for Self-Pay / Cash pay clients
 2. The co-pay / deductible must be for over \$100
 3. There can be a maximum of 3 payments in total. First payment must be made at time of service (follow instructions above).
 4. Fill out Payment Plan Form
 5. Once form is completed scan to patient's account
 6. Fax to MSN (number at bottom of form)
- d. Print Receipt for patient to sign.
3. In MI – Under the FRONT DESK TREE click on STEP 4 – NOTATE PAYMENTS



4. Click on Add New



5. Make sure you are on the correct appointment – the date, appt number, and description are all listed on the Collect Payments screen.



6. Enter payment amount under the correct type: cash, credit or check. Under REMARKS enter any notes necessary and your first initial and last name. (If a patient is paying using multiple types of payments you can enter at the same time – i.e \$50 cash; \$50 credit card)

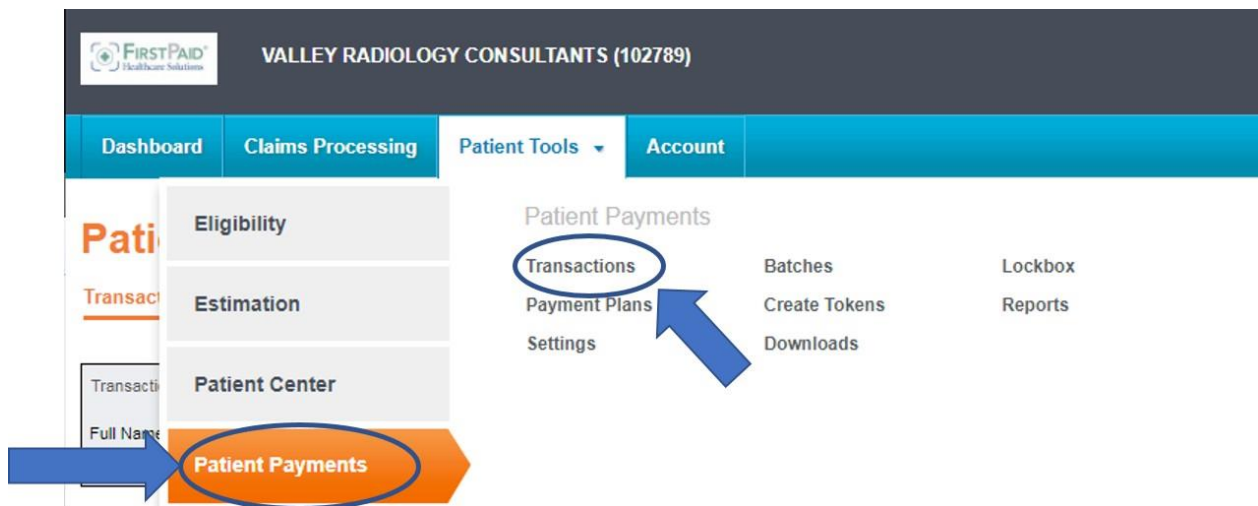
A screenshot of the 'Collect Payments' form. At the top, it shows the same appointment details as the previous screenshot: 'Date: 11/25/2017 Account: 3018879 Name: TEST, AA-TEST M Exam: MG GALACTOGRAM SINGLE LT ACC#: 5012840 Age: 6 yrs.' Below this are 'Done' and 'Cancel' buttons. The form is divided into sections: 'Cash' with a 'Cash Amount: \$' input field; 'Credit' with a 'Credit Type' section containing radio buttons for 'Visa Credit' (checked), 'MasterCard', 'Discover', 'Visa Debit', 'Bank-issued Debit', and 'Multiple types', and a 'Credit Amount: \$' input field with the value '100'; 'Check' with a 'Check Amount: \$' input field; 'Remarks' with a text area; and 'Comments:' with a text area containing 'PAID IN FULL. stewart'.

7. If the location of the appointment is different than the location of the collection of the payment (i.e. the appt is in Escondido, the payment is being collected in Poway) you can change the Location (this is only necessary if the locations differ).

8. Click on DONE, then click on EXIT. Receipt will pop up.
9. Print Receipt
10. If there are separate payments due for multiple exams make sure you exit the note payments screen and go into the next exam before taking an additional payment.
11. Scan in both the MI receipt and the Zirmed receipts to the patients account.

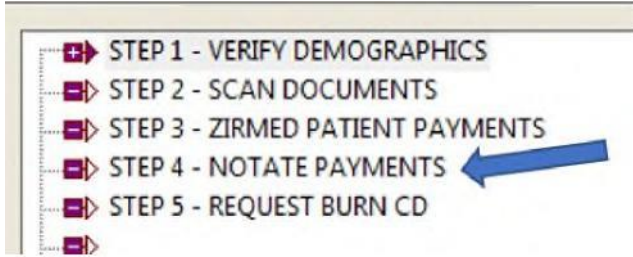
REFUNDING / VOIDING PAYMENTS IN MI AND ZIRMED

1. Process Refund / Void in Zirmed
 - a. In Zirmed – Patient Tools – Patient Payments - Transactions



- b. Search for client payment with name, account number, date
- c. If transaction is the same day click Void
 - i. A popup message will display “Void this transaction”
 - ii. Click ok
 - iii. Print receipt screen displays message that transaction was voided successfully.
 - iv. Print the receipt
- d. If transaction was for a previous date select Refund
 - i. Enter the refund amount
 - ii. Enter note as to why there is a refund

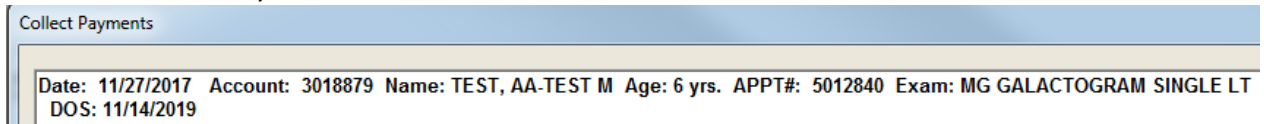
- iii. Click Submit
 - iv. Print receipt.
2. In MI – Under the FRONT DESK TREE click on STEP 4 – NOTATE PAYMENTS



3. Click on Add New



4. Make sure you are on the correct appointment – the date, appt number, and description are all listed on the Collect Payments screen.



5. Enter a NEGATIVE payment amount under the correct type: cash, credit or check. Under REMARKS enter any notes necessary and your first initial and last name. (If a patient is paying using multiple types of payments you can enter at the same time – i.e \$50 cash; \$50 credit card)

A screenshot of the 'Collect Payments' form. At the top, it shows the same patient information as the previous screenshot. Below this are 'Done' and 'Cancel' buttons. The form is divided into sections:

- Cash**: A text box for 'Cash Amount: \$' containing '.00'.
- Credit**: A section with a 'Credit Type' label and a list of checkboxes:
 - Visa Credit
 - MasterCard
 - Discover
 - Visa Debit
 - Bank-issued Debit
 - Multiple types
- Credit Amount: \$**: A text box containing '-100'.
- Check**: A text box for 'Check Amount: \$' containing '.00'.
- Remarks**: A large text area.
- Comments:**: A smaller text area containing the text 'Refunded as exam not done. sstewart'.

6. If the location of the appointment is different than the location of the collection of the payment (i.e. the appt is in Escondido, the payment is being collected in Poway) you can change the Location (this is only necessary if the locations differ).

7. Click on DONE, then click on EXIT. Receipt will pop up.
8. Print Receipt
9. If there are separate payments due for multiple exams make sure you exit the note payments screen and go into the next exam before taking an additional payment.
10. Scan in both the MI receipt and the Zirmed receipts to the patients account.