Post Personal Payments and Adjustments (pam)

The Physician's Computer Company

support@pcc.com
1 Main Street, Suite 7
Winooski, VT 05404
(800) 722-7708 Admin
(800) 722-1082 Support

2007/10/15 21:24:28

PRINTING INSTRUCTIONS: To print out copies of this document, browse to *Post Personal Payments and Adjustments (**pam**)* (http://learn.pcc.com/pam.pdf) to download a PDF formatted version. Then select the "File" menu and choose the "Print" option. If you have trouble opening and printing the PDF, please contact PCC support at <`support@pcc.com`> or (800) 722-1082.

Table of Contents

1. Introduction: Personal Payments

Use **pam** to post personal payments or adjustments to an account. The **pam** program makes it fast and easy to post a stack of checks or a single copay.

Payments typically posted through **pam** include personal checks, money orders, credit card payments, and cash. Payments from insurance companies are posted using the Post Insurance Payments (**pip**) (http://learn.pcc.com/pip/) program.

This document will teach you how to post a payment and apply it towards a charge. You will also learn special features and tools you can use during each step of the process.

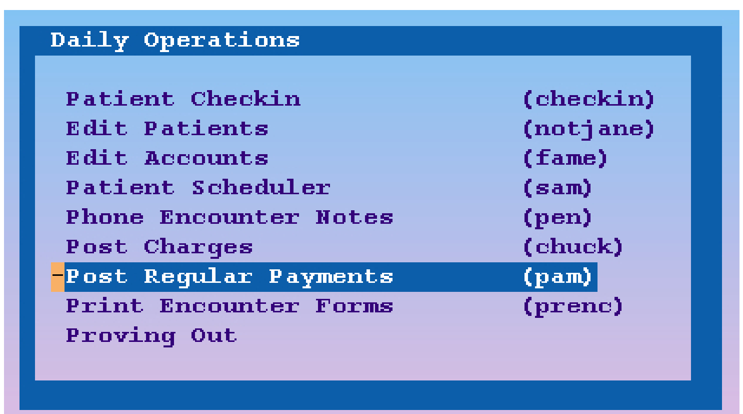
> **Not Just For Payments:** While **pam**'s primary purpose is to post payments, it can also post account adjustments. Any adjustment that behaves like a payment and would result in a decreasing balance should be posted in **pam**. Adjustments that behave like refunds (or procedures) and increase an account's balance (or remove a credit) should be posted in the **refund** program.

2. Quickstart: Post a Payment

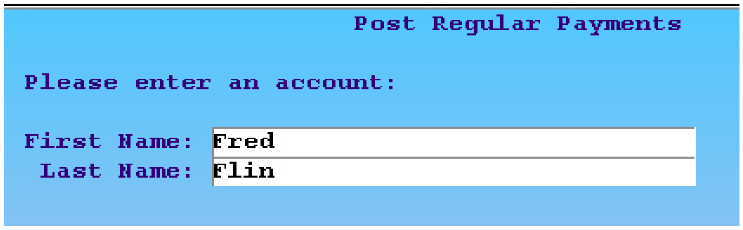
Read the steps below for a complete introduction to **pam**. Follow the steps to post a personal check and apply it to several old balances. Then read the section below to learn more about the tools and features of **pam**.

1. Start **pam** and Find an Account

   You can access **pam** from the "Daily Operations" window of your Partner windows. You can also type **pam** at a command prompt.



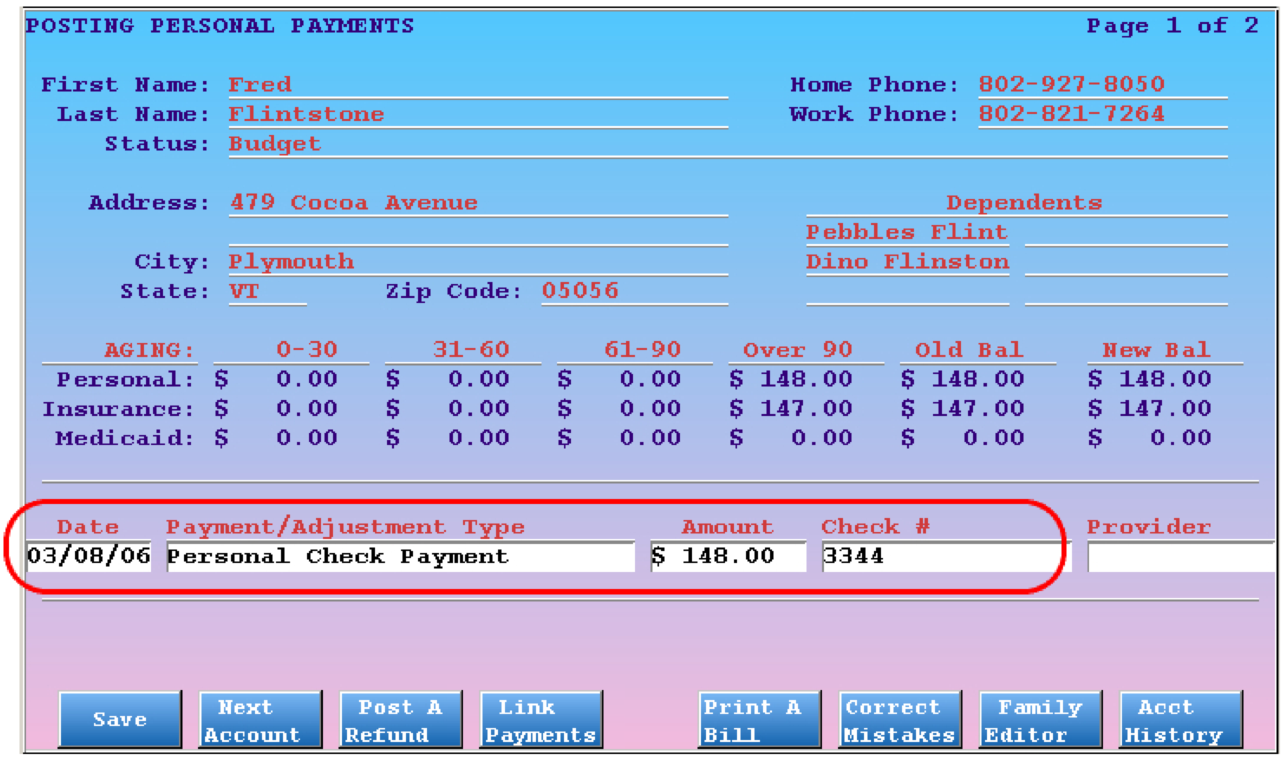
   Enter the account's name into the find screen:



To learn more about finding patients and accounts, read *Finding Patients and Accounts* (http://learn.pcc.com/findroutines/).

2. Enter Basic Payment Information

   Enter the date of the payment, the payment type, the amount, the check number (if applicable) and optionally a provider. Press the **Tab** or **Enter** keys to move forward one field, press the **Backspace** or left arrow keys to move back one field.



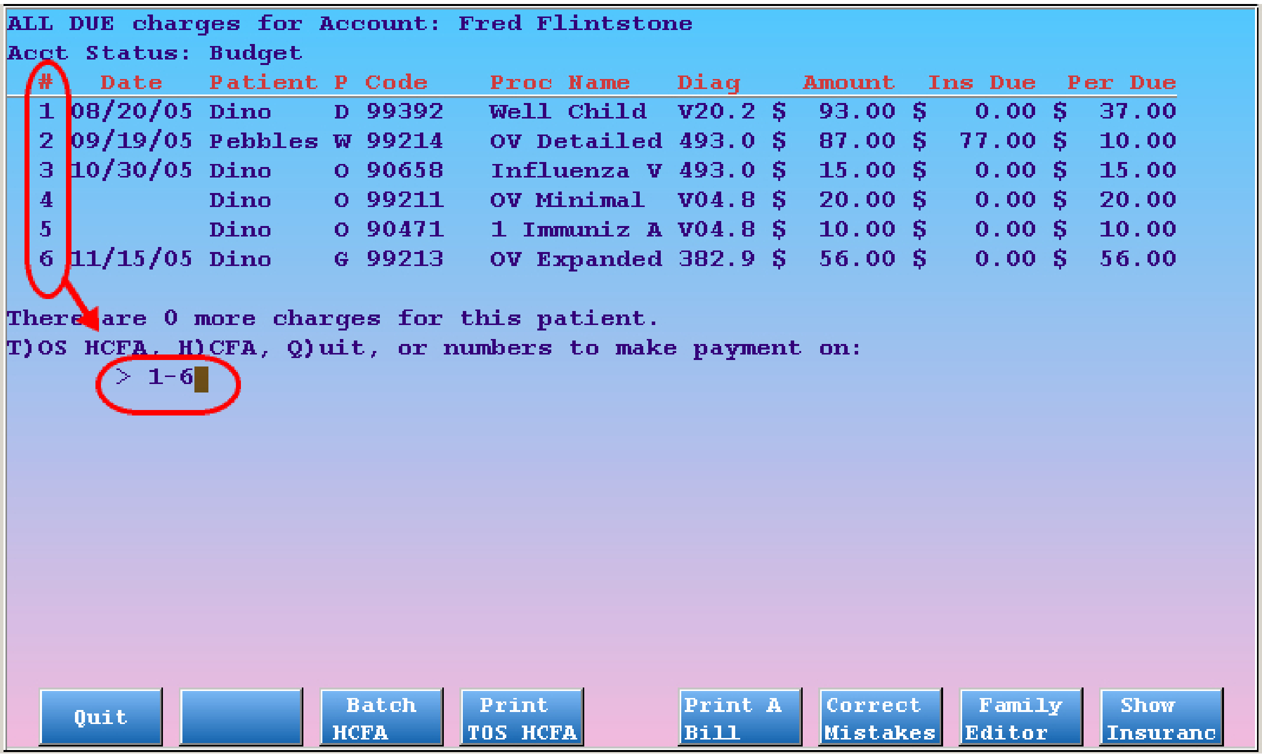
Automatic Date: Today’s date is entered for you automatically. If you wish to record a previous date of payment, simply press **Backspace** and change the date. The date can be written without slashes, i.e. "092205" for September 9th, 2005, and you can use the abbreviations of "y" for yesterday and "t" for today.

3. Press [**F4** -- *Link Payments*]

   Press **F4** to view the list of outstanding charges to which your new payment may be applied.

4. Select Charges to Apply the Payment Against

   Enter the number, or range of numbers, of the charges towards which you wish to apply your new payment. To help you make your selection, the screen displays the amount of each charge that is currently pending insurance and the amount due personal. In most cases, you will apply the full amount of a personal payment to the oldest charges first.

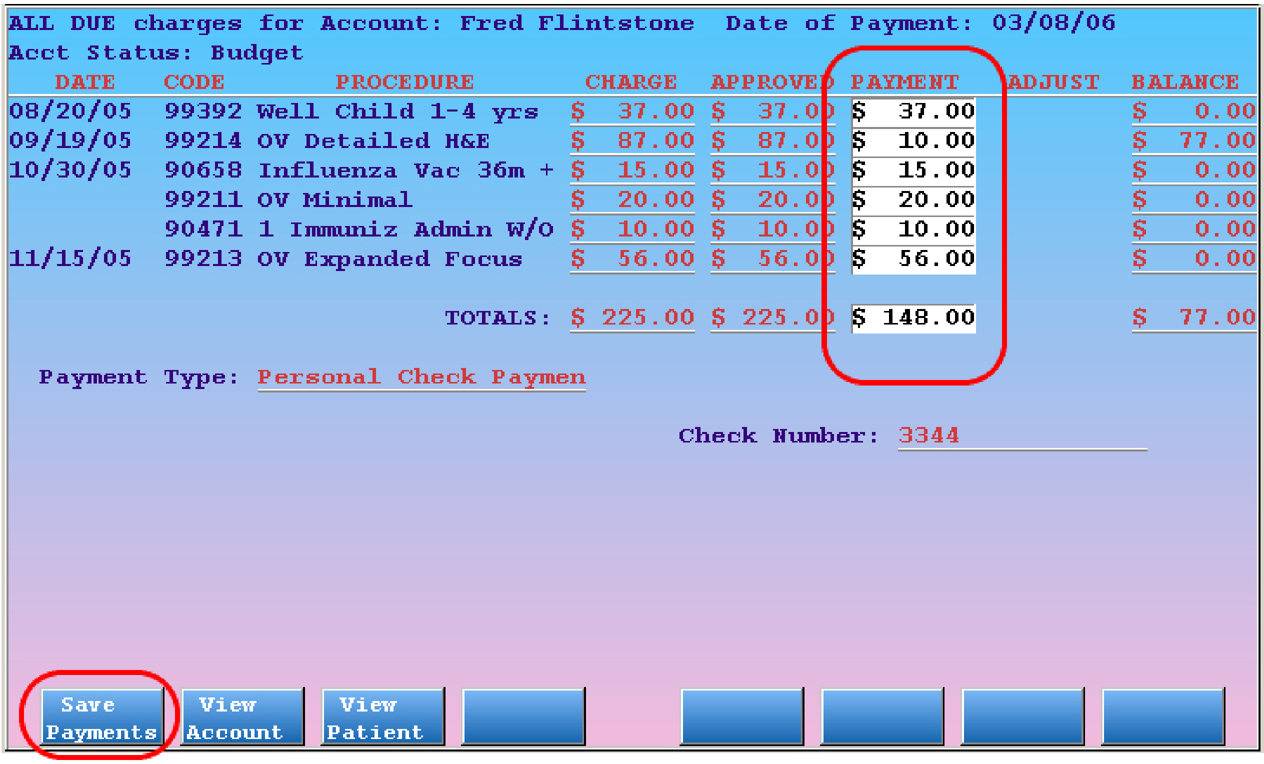


You can use a range of numbers or commas to select specific charges. Press **Enter** to continue.

> **Where is the Charge I Need?:** The screen will only show unpaid charges that are at least partly personal. Paid charges or charges that have no personal balance will not appear. If you can not find the charge you expected to see, press [**F8** -- *Show Insurance*] to view both insurance and personal charges. You can also press [**F6** -- *Correct Mistakes*] or [**F7** -- *Family Editor*] (from which you can run a Collection report or Family History report) to analyze the account and find out when the charge was paid off.

5. If Necessary, Indicate How to Apportion the Payment

   If you selected charges that exceed the value of the payment, you can use the next screen to indicate how much of the payment should be applied towards each charge.



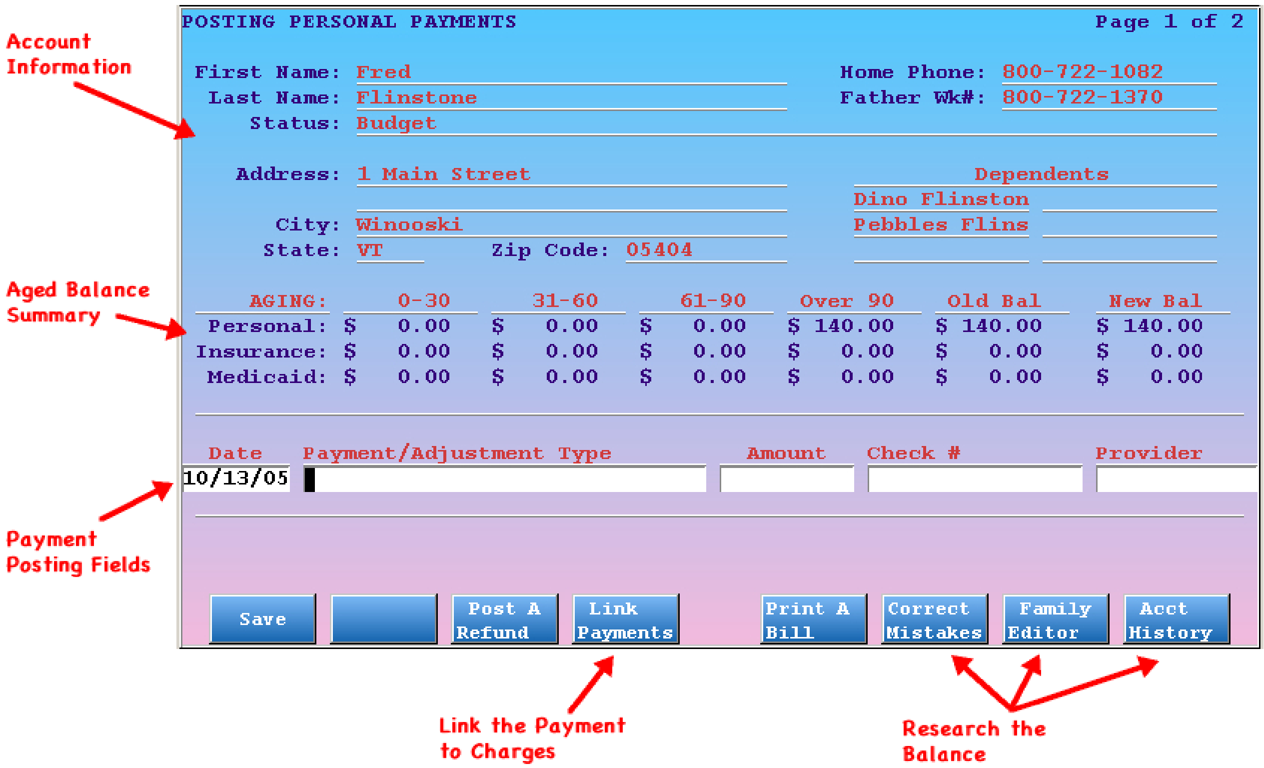
Customized Behavior: You can configure Partner to automatically distribute the payment among the charges or to apply the money towards the oldest charge first. Contact PCC for more information.

6. Press [**F1** -- *Save*]

   Press **F1** to save your payment and return to the main **pam** screen. Your payment has been posted, and you will see the updated "New Balance" column.

3. The Posting Payment Screen

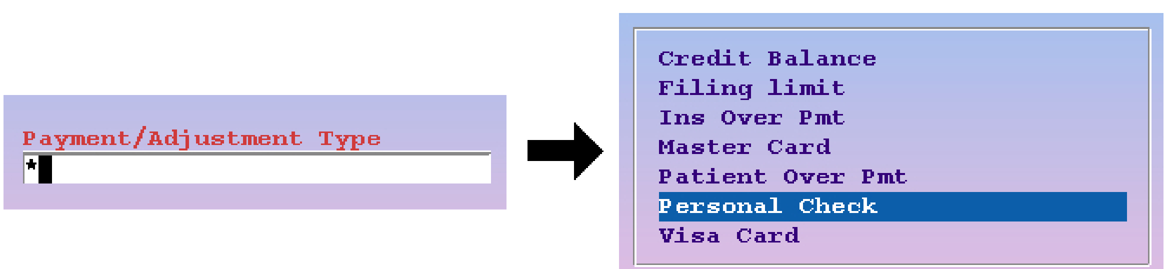
When you first run **pam**, it asks you for an account name. Once you have found an account, you are presented with the payment-entry screen:



This screen contains useful demographic information for the account, provides links to several other Partner programs, and allows you to begin posting a payment by entering information in the available fields.

The demographic information includes account name and contact information. You can also review the Status field, which may list important billing statuses for the family, such as "Overdue" or "Bad Check." The screen also shows you a list of dependents to the family and a balance summary, aged by transaction date, for Personal, Insurance, and Medicaid balances on the account.

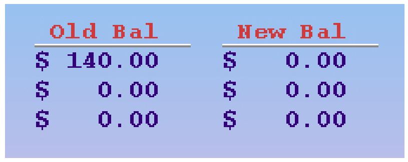
Look-Up Fields: Both the "Payment/Adjustment" field and the "Provider" field are look-up fields. You can enter an abbreviation or use an asterix (*****) to look at a list of possible entries. Common answers for the "Payment/Adjustment" field are "Personal Check," "Cash," or "Courtesy Adjustment."



More Demographic Information: Press **Page Down** to view a quick summary of other account demographic information, including insurance information and recent accout notes. You can press **Page Up** to return to this screen. You can also press [**F7** -- *Family Editor*] to run **fame** and make changes to the account information.

Link Payments: Whenever you post a payment, you should use **pam**'s *Link Payments* feature to link payments to the particular charges they are paying off. In other words, you should *specify* for which charges the payment is intended. If you *don't* press [**F4** -- *Link Payments*], and press **F1** to save the payment, you will be posting an unlinked or open-item payment. Open-item payments are still applied towards the account's oldest personal balance, but they may float around on an account, making it difficult to track and understand an account's history and remaining balance.

New Balance: Once you have posted a payment, the final column in the balance summary, "New Bal" will be updated with the accounts new outstanding balance:



Old Bal	New Bal
$ 140.00	$ 0.00
$ 0.00	$ 0.00
$ 0.00	$ 0.00

Posting Personal Overpayments/Credits: Posting a personal overpayment in Partner is simple. Use **pam** to post a payment and do not press [**F4** -- *Link Payments*]. The account will have a credit, which you can then refund or leave on the account until the next visit. The credit will automatically be applied to any outstanding balances on the account, and you can link it to the charges by running **oops** (http://learn.pcc.com/oops/).

The function keys at the bottom of the screen help you jump to many other Partner tasks.

Function Keys

[**F1** -- *Save*]

Press [**F1**] to save any payments you have entered as open-item payments and quit **pam**. You can then enter a new account name or press **F12** to quit and run a different program. If you have entered a payment amount, you should consider pressing [**F4** -- *Link Payments*] and assigning the payment to specific charges before pressing **F1**.

[**F3** -- *Post a Refund*]

Press **F3** to run the **refund** program. Use **refund** to post refunds or any other adjustments that take money away from an account or increase the balance.

[**F4** -- *Link Payments*]

Press **F4** after entering a payment type (and check number, if desired) to select outstanding charges to which the payment should be applied. If you post a payment without using **F4**, it will be an open-itemed payment that Partner will automatically apply to the oldest unpaid charge.

Function Keys While Specifying Payments: On the first Link Payments screen, function keys are available to batch claims, print paper claims, print bills, run **oops**, and run the Family Editor (**fame**).

[**F5** -- *Print a Bill*]

Press **F5** to print a paper bill, for any desired date range, for the account.

[**F6** -- *Correct Mistakes*]

Press **F6** to run **oops**, the "Correct Mistakes" program. In **oops**, you can change the pending status of charges, delete payments or charges, and adjust various visit information. If you need to link or unlink payments from charges, run **oops**. For full documentation on **oops**, read *Correct Mistakes* (http://learn.pcc.com/oops/).

[**F7** -- *Family Editor*]

Press **F7** to run **fame**, the Family Editor. In **fame**, you can change account demographic information, including mailing address and insurance policy information. The Family Editor also provides access to the *Collection Report* (http://learn.pcc.com/coll/), which can help you understand an account's outstanding balances. For full documentation on **fame**, read *Editing Patients and Accounts* (http://learn.pcc.com/famenotjane/).

[**F8** -- *Acct History*]

Press **F8** to run **tater**, the Account History report. This report, which can be restricted by date and type of transaction, shows you a history of all transactions on an account.