Telehealth Copay Collection

Expected Go Live	June 2020
Impacted Locations	All Locations
Intended Audience	Front Desk Staff

Copays for Telehealth visits can now be collected via phone. The transaction should be done within 4 hours or less prior to their scheduled appointment time. The patient will also have the option to save their credit/debit card information for future payments. Credit card information is being entered directly thru encrypted credit card devices in a PCI Compliant manner and will not be stored in Epic. If the patient entered their credit/debit card information in MyChart, continue to obtain verbal consent to process the pre-authorized card.

Processing a credit card payment over the phone.

When collecting a copay, contact the patient within 4 hours or less prior to their appointment time.

1. From the Department Appointment Report (DAR) sort the Telehealth visits by clicking the procedure header. This will easily identify these visits and verify if a copay is due.

| Appt Time	Status	MRN	Pt Info	Procedure
11:00 AM	Sch	0004	Mo	televidret
11:40 AM	Arrived	1110	Test, Patient	televidret
12:40 PM	Sch	0005	West	telephret

Note: If no copay is due, select the patient from the DAR, click Check In and complete all necessary registration information, if necessary call the patient to obtain missing registration items. Click Continue Check In.

Scripting: _My name is _____, I'm calling from Northwestern Medicine. You have a co-pay of _____ for your Telehealth appointment today at _____, "I'm calling to obtain payment over the phone"._

2. Select the patient, Click Check In and complete all necessary registration.
3. Click Continue Check In.
4. Verify the amount is correct in the Collecting box and click Collect Payment.
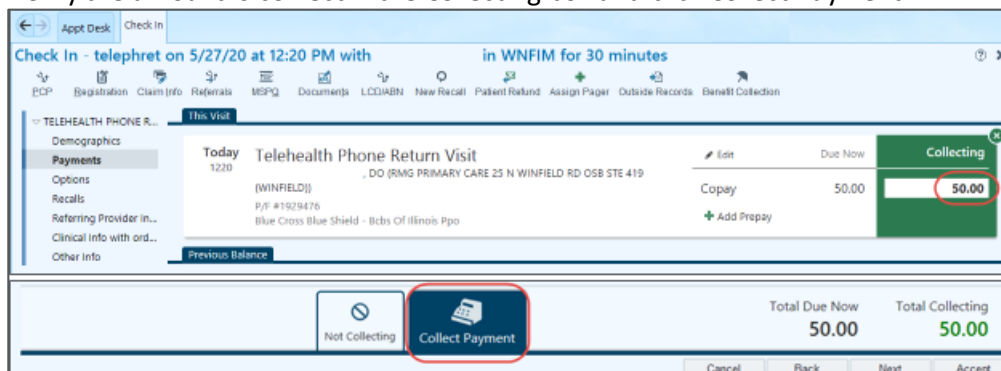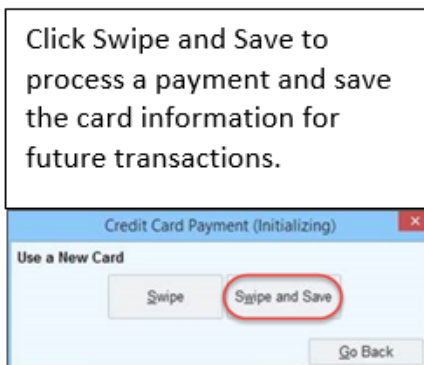
5. Select Card as the payment source. Ask the patient if they want a receipt, if yes, proceed to generate a receipt. If not, proceed to next step.
6. Select the receipt type, Email or Print Receipt. If email option is not listed, you will need to mail a paper receipt. You can manually enter the email address provided by the patient.
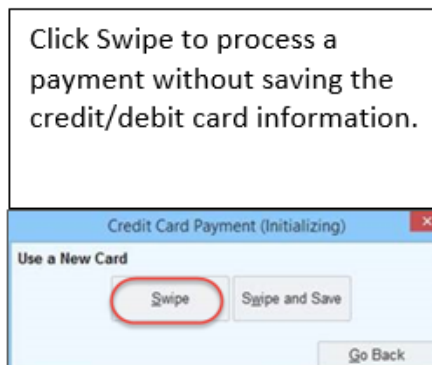7. Click Collect Payment.
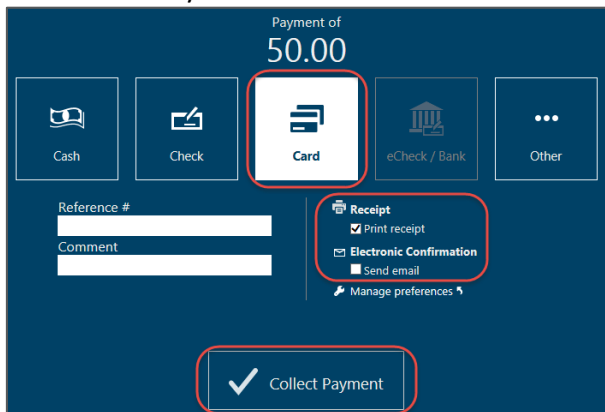
Scripting for saving a credit card for future payments: *Our secure patient accounting system allows for NM to maintain your payment information for future transactions. The information is secure and NM will never take a payment from you without your consent. This is both a convenient option for you, and allows for touchless transactions. May I opt you in?"*
Note*: Patients can also update their payment preferences in MyChart.*

8. The registrar can process and save credit/debit card information for future payments or process a onetime payment using one of the following steps:

Saving Card Information	**Without Saving**
Click Swipe and Save to process a payment and save the card information for future transactions.	Click Swipe to process a payment without saving the credit/debit card information.

9. The registrar will be prompted to swipe the card, Select Manual.

10. The following information will need to be entered manually into the credit card terminal at your workstation when collecting over the phone.
- Enter the credit/debit card number
- Expiration date
- CVV code.

Trust Commerce software is on all computers with the Ingenico credit card devices.

4.1 version software will not be prompted to have the registrar enter the zip code. Registrars will see the screen below.	4.3 version software will prompt you to enter the zip code. NM will be installing 4.3 software to all computers with devices after 6/1/20.

FYI- If a card has been saved, the next time the registrar takes a payment from the patient they will verify with the patient whether they would like to use the credit card that is saved or if the patient would like to add a new card.
- To use the card on file, registrar will click Process.
- To add a new card, registrar will click Swipe or Swipe and Save.

FYI – If a card is declined, inform the patient that the payment did not go through and that they will receive a bill in the mail.

11. Inform the patient that someone from the Clinical Care team may call them to collect medical history prior to their appointment with their provider.