

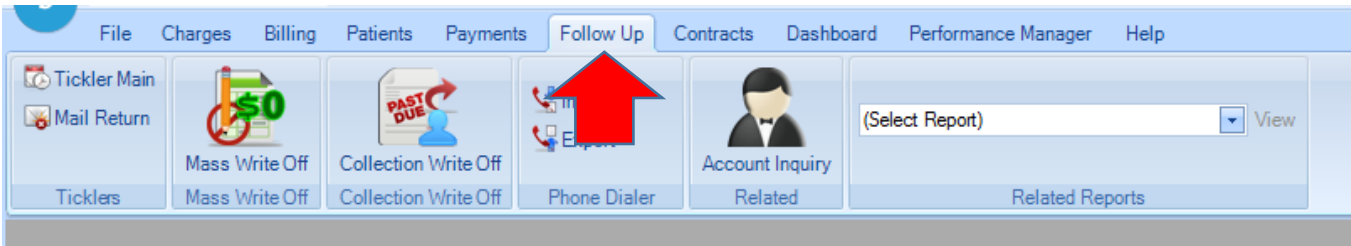
## Imagine Training: Collecting Patient Balances

Due to high deductible insurance plans, it's increasingly important for practices to collect on patient balances at check-in. This handout will discuss the most efficient ways for staff to locate patient balances in Imagine .

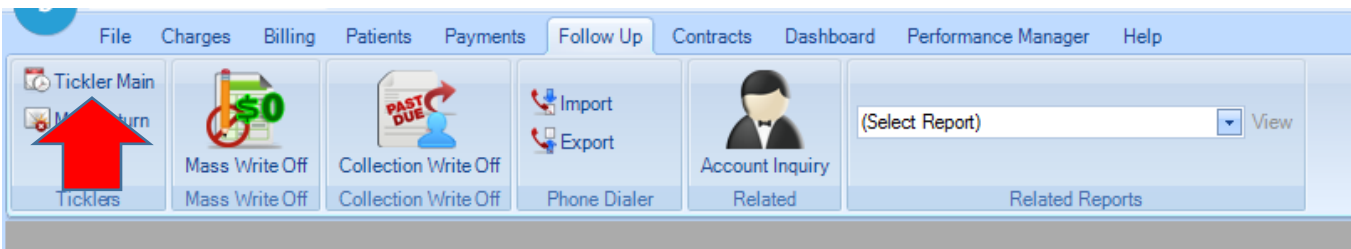
### Locating Patient Balances Based on the Provider Schedule:

Front desk and billing staff can quickly review all patient balances in Imagine against the following day's office schedule by following the steps below.

After logging into Imagine, click the Follow-Up menu.



Choose Tickler Main from the sub menu.



In the Tickler Main tab that appears, choose "Patients" from the Tickler Type drop-down menu. Then choose "All" from the Representative drop-down and "All" from the Tickler View drop-down.

The screenshot shows the 'Ticklers' window with the following settings: Tickler Type: Patient, Representative: (All), Tickler View: All Charges. The table below shows 73 patients with 103 assigned charges and a total balance of \$4,257.88. A red arrow points to the 'Patient' dropdown, another to the '(All)' dropdown, and a third to the 'All Charges' dropdown.

Pat	Patient First Name	Balance Amount	Statement Type	Charges	Max Date Of Service Age	Max Statement ...	Max Initial	Age	Last Patient Payment Dat
15	JERRIE ANN	4.21	Statement 1	2	50	6	6		
17	CURTIS	\$15.36	Statement 1	1	50	22	22		
18	DEBORAH	\$30.00	Statement 1	1	50	27	27		
23	GWENDOLYN	\$10.76	Statement 1	2	48	27	27		
38	DEBRA	\$30.00	Statement 1	1	47	9	9		
45	KIMBERLY	\$25.00	Statement 1	1	48	13	13		
48	ELIZABETH	\$107.59	Statement 1	2	48	18	18		
55	CHRISTINE	\$225.60	Statement 1	1	48	9	9		
63	MARY	\$179.75	Statement 1	1	44	20	20		
64	ROBERT	\$107.59	Statement 1	2	44	2	2		

Below the patient list, there is a summary for 2 charges with a total balance of \$114.21. The table below shows the details for these charges:

Visit Number	Date Of Service	Procedure	ICD9 - Diagnosis	ICD10 - Diagnosis	Balance Amount	Date Of Service Age	Last Statement Date	Refer
1309907	1/3/2017	93000 - ELECTROCARDIOGRAM, ...		I49.1	\$15.36	50	2/16/2017	1833
1309907	1/3/2017	99214 - OFFICE OUTPATIENT VISIT		E11.22, Z86.010, 11...	\$98.85	50	2/16/2017	1833

Click the Patient First Name or Patient Last Name column headers to sort by name. Use the “.....” in the middle and right of the screen to manage your view in order to see as many names as possible at one time.

The screenshot shows the 'Ticklers' application interface. At the top, there are filters for 'Tickler Type' (Patient) and 'Representative' (All). The main table displays 73 patients with 103 assigned charges, totaling a balance of \$4,257.88. The table columns include Patient ID, Patient First Name, Balance Amount, Statement Type, Charges, Max Date Of Service Age, Max Statement Age, Max Initial Statement Age, and Last Patient Payment Date. A red arrow points to the 'Patient First Name' column header. Below this, a detailed view shows 2 charges with a total balance of \$154.21. The columns here include Visit Number, Date Of Service, Procedure, ICD9 - Diagnosis, ICD10 - Diagnosis, Balance Amount, Date Of Service Age, Last Statement Date, and Referral. A red arrow points to the 'ICD9 - Diagnosis' column header. At the bottom, there are buttons for 'Messaging', 'Reassign', 'Patient', 'Notes', and 'Actions', and a 'VPN Client' label.

Patient ID	Patient First Name	Balance Amount	Statement Type	Charges	Max Date Of Service Age	Max Statement ...	Max Initial Statement Age	Last Patient Payment Date
15	JERRIE ANN	\$114.21	Statement 1	2	50	6	6	
17	CURTIS	\$15.36	Statement 1	1	50	22	22	
18	DEBORAH	\$30.00	Statement 1	1	50	27	27	
23	GWENDOLYN	\$10.76	Statement 1	2	48	27	27	
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Visit Number	Date Of Service	Procedure	ICD9 - Diagnosis	ICD10 - Diagnosis	Balance Amount	Date Of Service Age	Last Statement Date	Referral
1309907	1/3/2017	93000 - ELECTROCARDIOGRAM, ...		I49.1	\$15.36	50	2/16/2017	1833
1309907	1/3/2017	99214 - OFFICE OUTPATIENT VISIT		E11.22, Z86.010, I1...	\$98.85	50	2/16/2017	1833

This view is showing all patient balances in Imagine for your practice. User can now review the list and search for balances against the provider’s schedule. Balance amount and Statement Stage can also be seen in this view.

This screenshot is similar to the first one, showing the 'Ticklers' application. The main table shows 73 patients with 103 assigned charges, totaling a balance of \$4,257.88. Red arrows point to the 'Balance Amount' and 'Statement Type' columns. The detailed view below shows 2 charges with a total balance of \$114.21. The columns are the same as in the first screenshot. The interface includes the same filters, buttons, and 'VPN Client' label at the bottom.

Patient ID	Patient First Name	Balance Amount	Statement Type	Charges	Max Date Of Service Age	Max Statement ...	Max Initial Statement Age	Last Patient Payment Date
15	JERRIE ANN	\$114.21	Statement 1	2	50	6	6	
17	CURTIS	\$15.36	Statement 1	1	50	22	22	
18	DEBORAH	\$30.00	Statement 1	1	50	27	27	
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## Exporting Patient Balances:

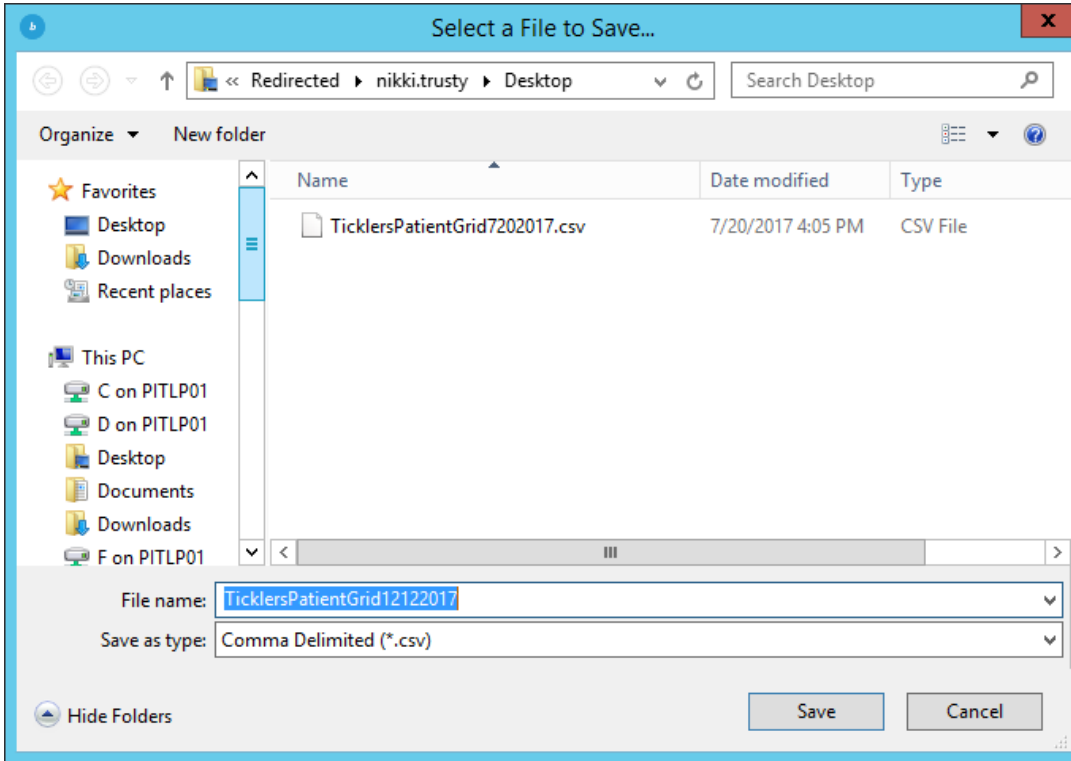
To export the complete list of patient balances, click the “Options” button at the top right of the window.

The screenshot shows the 'Ticklers' application window. At the top, there are filters for 'Tickler Type' (Patient) and 'Representative' ((All)). The 'Tickler View' is set to 'All Charges'. A table displays patient data with columns: Patient ID, Patient First Name, Balance Amount, Statement Type, Charges, Max Date Of Service Age, Max Statement ..., Max Initial Statement Age, and Last Patient Payment Date. The table shows 73 patients with a total balance of \$4,257.88. A red box highlights the 'Options' button in the top right corner of the table. Below the main table, there is a section for '2 Charges - Total Balance \$114.21' with columns: Visit Number, Date Of Service, Procedure, ICD9 - Diagnosis, ICD10 - Diagnosis, Balance Amount, Date Of Service Age, Last Statement Date, and Referral. The bottom of the window shows 'Insurance \ Resp. Party Info' with buttons for 'Messaging' and 'Reassign', and a 'Patient' dropdown menu.

In the drop-down that appears, click the “Export” option and then choose “CSV”.

This close-up shows the 'Options' menu that appears when the 'Options' button is clicked. The menu items are: Goto, Column Manager, Export, and Print. The 'Export' option is highlighted, and a sub-menu is open showing 'To CSV File' and 'To File'. A red arrow points to the 'To CSV File' option.

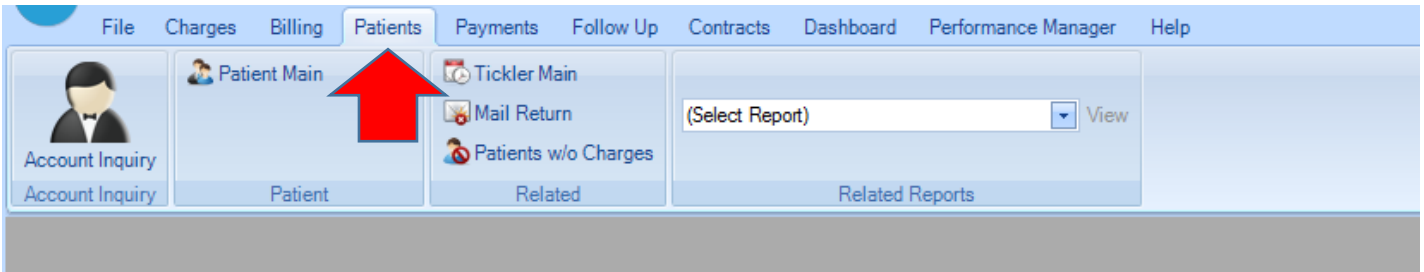
A “Save As” window will appear. When exporting files while in the remote computer it is important to choose the correct folder or desktop option so that the file is sent to your desktop instead of the remote computer’s desktop. See the example below. In the left side of the window we see two options for “Desktop”, one at the top of the list and another under the “This PC” section. To export to our own computer, we should choose the “Desktop” under “This PC”. Then name the file and click Save. The exported list of patients and balances should then be found on your computer’s desktop.



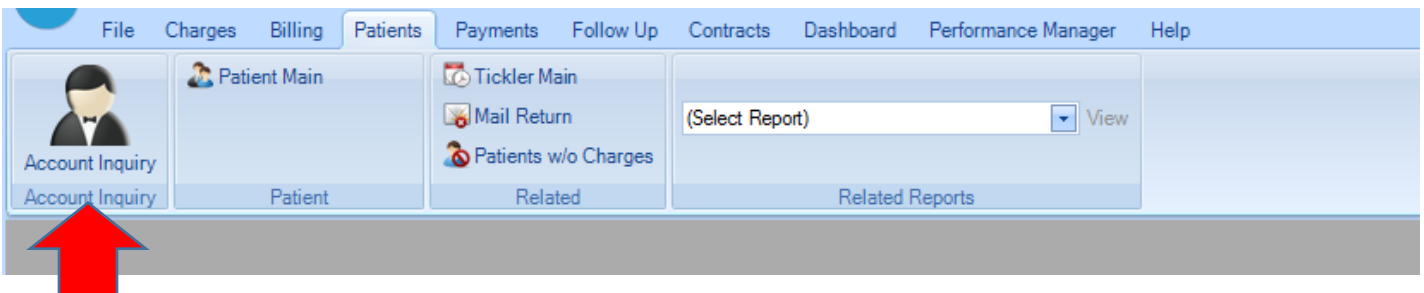
## Locating Individual Patient Balances:

In some cases the practice staff may want to review individual patient accounts for balance information.

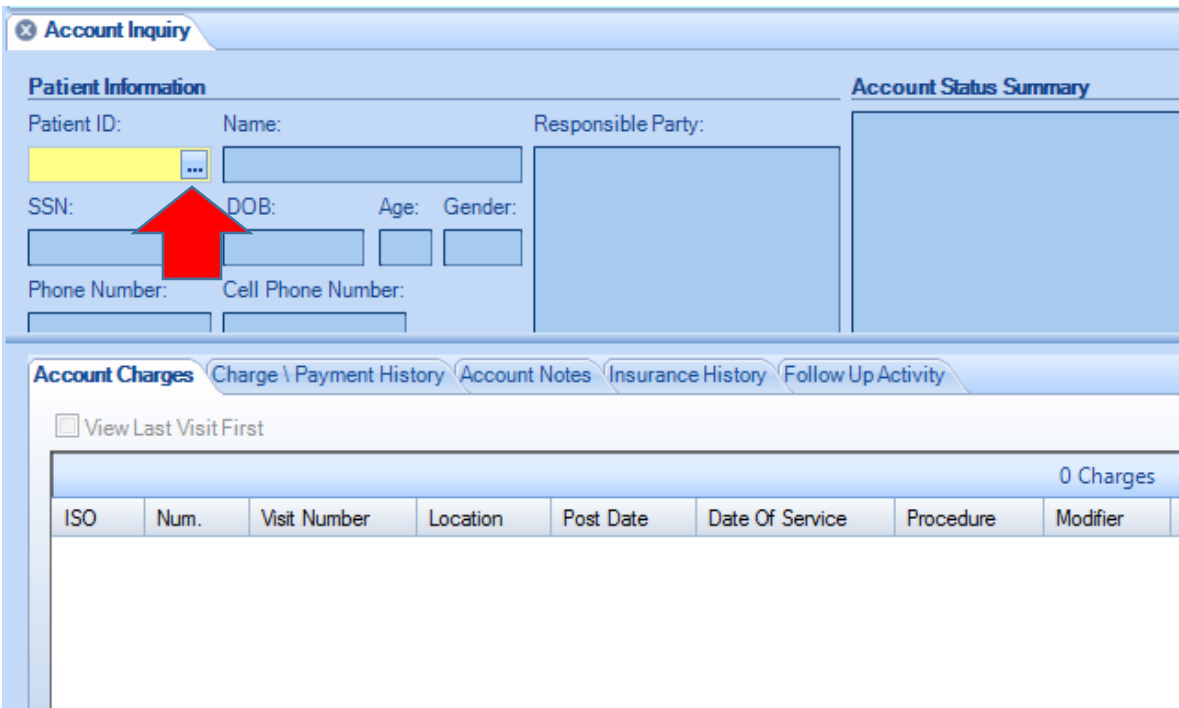
After logging into Imagine, click the Patients menu.



Then choose Account Inquiry from the sub menu.



In the Account Inquiry window that appears, open the search window by clicking F3 or the “...” in Patient ID.



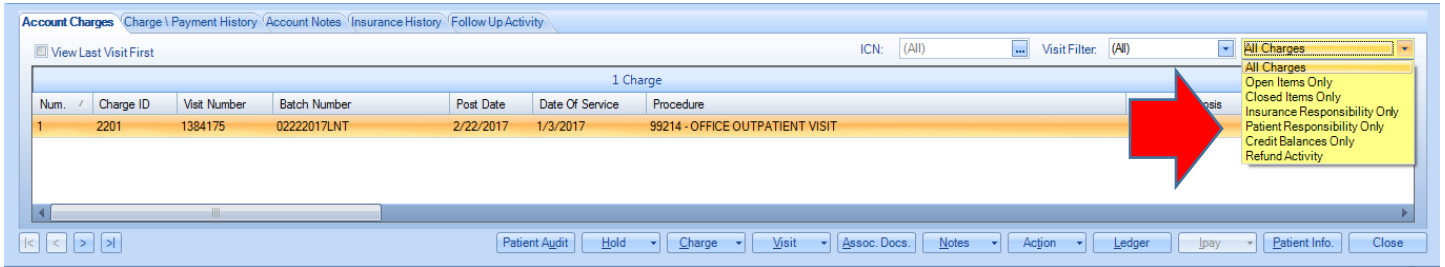
Enter the patient details and Select the patient to open their Account Inquiry.

Patient ID	Middle Name	Last Name	First Name	Account Balance Amount	SSN	Address
10	TEST	NIKKI	NIKKI	\$225.60	423-19-8527	123 Main Street

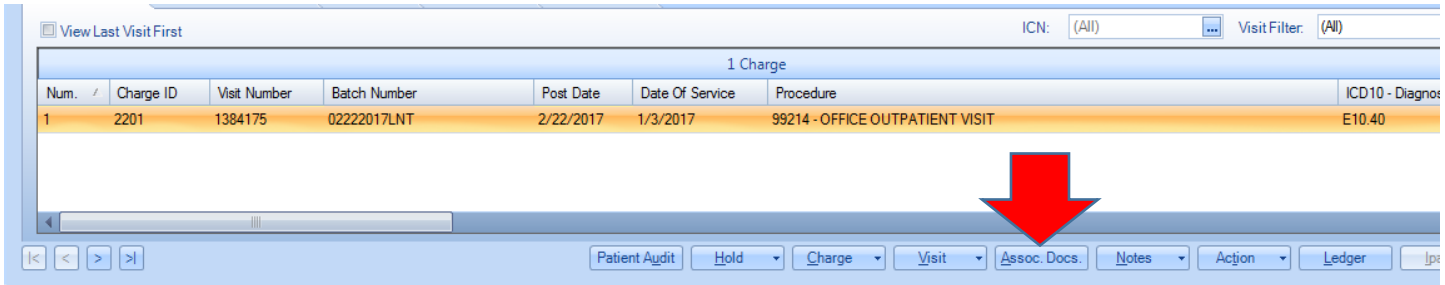
The current balance information can be found in the top section of the window under Account Status Summary. Balance details are divided into Insurance, Patient, and Total.

Patient Information		Account Status Summary		Insurance Information	
Patient ID:	Name:	Status:	Open	Last Statement:	Statement
10	TEST, NIKKI	Ins. Last Payment:	N/A	Date:	\$
SSN:	DOB:	Ins. Balance:	\$0.00	Next Statement:	Statement 1
423-19-8527	02/01/1986	Pat. Last Payment:	N/A	Date:	In Review
Age:	Gender:	Pat. Balance:	\$225.60	Primary Plan:	1008 - MEDICARE PART A B
31	F	In Collections:	\$0.00	Secondary Plan:	2006 - BCBS PREFERRED
Phone Number:	Cell Phone Number:	Collection WO:	\$0.00		
(615)851-6033	(615)476-2553	Bad Debt WO:	\$0.00		
Address:	Employer:	Total Balance:	\$225.60		
123 Main Street Nashville, TN 37203	Larry D. Gurley, MD 300 20th Ave N Suite 102,na (615)851-6033 Ext.				

All posted charges can be seen in the bottom section of the window. Use the filter options to view only charges with patient responsibility.



To view and/or print a copy of the most recent statement, click "Assoc Docs" at the bottom of the window



In the Associated Documents window that appears, Statements will appear in the top middle of the screen. Double click the statement to view and/or print the image.

