

Update Credit Card Information

PURPOSE

- 1. Address patient requests promptly.
- 2. Avoid charges to incorrect or expired credit cards.
- 3. Move orders quickly and efficiently through the flow of the practice.
- 4. Create continuity with processing.

PROCEDURE

Expected time frame: As needed

When there is an encounter open that has charges:

- 1. Open the patient's chart.
- 2. In the navy Admin Notes box on the right side of the patient's dashboard, click the pencil to edit the box.
- 3. Delete the old CC listed, then put the following in this exact format: [today's date]: [V/MC/ D/AE if known] ([exp date as two-digit month/two-digit year]) ([security code])

Example: 05-01-15: V 0437 (08/17) (437)

- 4. Click the disk icon to save your changes to the box.
- 5. Click the pencil in the black Patient Information box. Update shipping/billing address or billing name (if different from patient's) if needed.
- 6. Open the Admin Notes associated with the encounter. Put your date/initial stamp, whatever notes are needed about the estimate or charges, then add "New CC: [full card number] ([two-digit month/two-digit year]) ([security code]), same billing address." Save and close note. Example below, outlined in orange:

04/30 Initial consult (AN) 04/30 Admin Notes			
Admin Notes	04/30/2015		Admin Note
ADMIN: ====================================			Assessment Diagnosis
======================================	437 (08/17) (437).		No Diagnoses Found
			Plan Rx/ Orders/ Vaccines
			Charges / Payments
		- 1	No charges currently



- 7. From the Patient Dashboard, hover on "tasks," then click "show patient's task and schedule history."
- 8. Open the task that matches this encounter. Put your date/initial stamp, followed by your message about the estimate or order, then add the same message from the Admin Note (i.e., "New CC: [full card number] ([exp date as two-digit month/two-digit year]) ([security code]), same billing address) then a line. Assign the task to the biller (or appropriate staff member) and "accept edits to this task." Example below outlined in orange:

Modify Task	
John Doe Follow-Up 4-25-15 (AN)	Subject
5-5-15 (LM) Pt approves estimate. New CC: 1234 1234	1234 437 (08/17) (437).
04-29-15 (NJ) done. pts wants CR date for April or Ma	y
	Associated Patient (Opt)
Leave Due Date Blank if you don't want a specific due date Due Date Nudge Due Time -1 hr +1 hr Tack is far Diago Millo	Reminder: 15 minutes before \$
Task is for Diane Mills	Normal -
Accept Edits to the	s Task Mark this task as complete?
rask added by Arriy Nett on January 19, 2015 ; Last edited by I	Natalie Jackson at 01/29/2015 11:01

9. In the PPQ, click to respond to the patient. After your message about the estimate or charge, add the following note: "We have also updated your credit card on file."

When there is no encounter open that has charges:

- 1. Open the patient's chart.
- 2. In the navy Admin Notes box on the right side of the patient's dashboard, click the pencil to edit the box.
- 3. Delete the old CC listed, then put the following in this exact format: [today's date]: [V/MC/ D/AE if known] ([exp date as two-digit month/two-digit year]) ([security code])

Example: 05-01-15: V 0437 (08/17) (437)

- 4. Click the disk icon to save your changes to the box.
- 5. Click the pencil in the black Patient Information box. Update shipping/billing address or billing name (if different from patient's) if needed.
- 6. Click "edit patient" to close the box when finished.
- 7. Click on "tasks," then "+add new task."
- 8. Subject: [patient name] CC Update [date]



9. Task details: put your date/initial stamp followed by "New CC: [card number] ([exp date as two-digit month/two-digit year]) ([security code]), same billing address." Assign the task to the biller and "add new task." Example below:

Schedule New Task	8			
John Doe CC Update 5-1-15	Subject			
5-5-15 (LM) New CC: 1234 1234 1234 0437 (08/17) (437).				
	Associated Patient (Opt)			
Leave Due Date Blank if you don't want a specific due date Due Date Nudge Due Time -1 hr +1 hr	Reminder: 15 minutes before 🛊			
Task is for Diane Mills	Normal + Priority			
+ Add New Task				

Note: If pt also updated billing/shipping address, add this to your message: Subject: [patient name] CC & Address Update [date]

Task details: put your date/initial stamp followed by "New CC: [card number] ([exp date as two-digit month/two-digit year]) ([security code]). New billing address: [full address]."

10. In the PPQ, click like to respond to the patient with the following message:

Thank you, [patient name]. We have updated your credit card on file.

[your signature]