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:
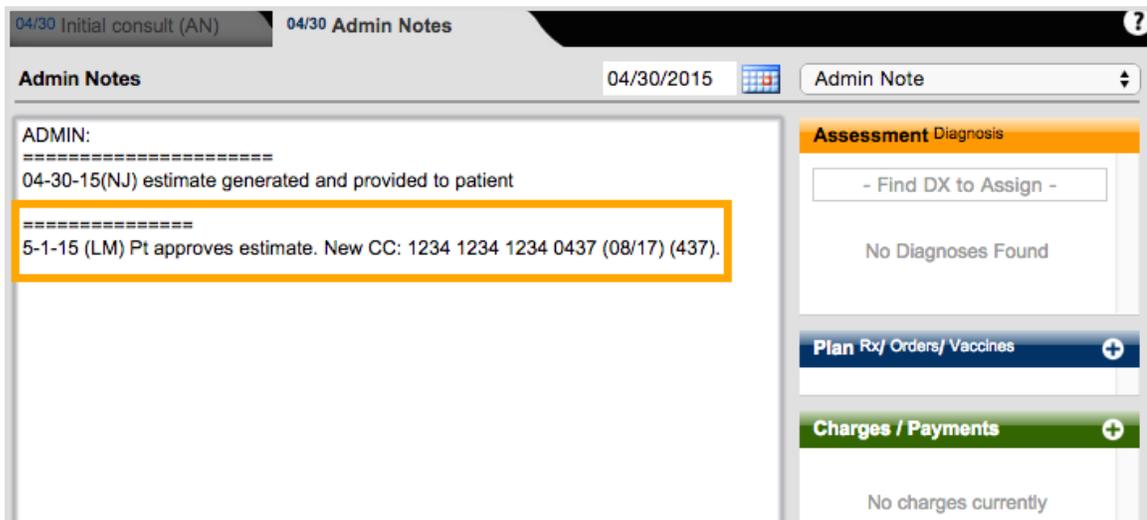
7. From the Patient Dashboard, hover on "tasks," then click "show patient's task and schedule history."

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:

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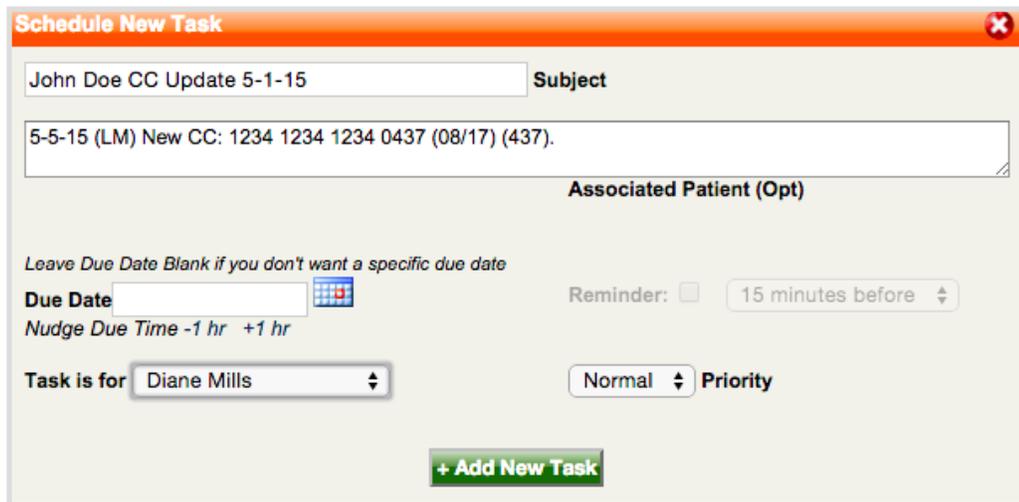
Note: If pt also updated billing/shipping address, add this to your message: Subject: [patient name] CC & Address Update [date]

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 to respond to the patient with the following message:

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

[your signature]