

CGM webPRACTICE™ Information for CGM eMEDIX® Payment Portal Payments







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NOTICE

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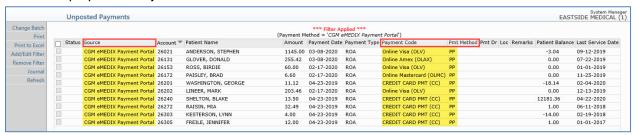


PROCESSING & VIEWING CGM EMEDIX PAYMENT PORTAL PAYMENTS

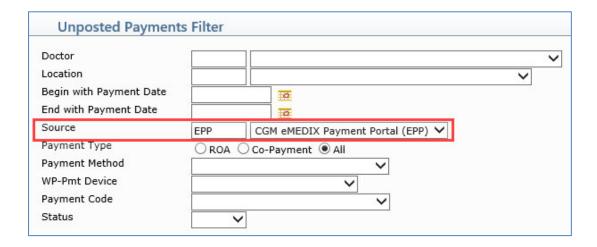
Unposted Payments - Processing Payment Portal Payments

If you have been activated for the *CGM eMEDIX Payment Portal*, any payments received from the CGM eMEDIX Payment Portal will be stored in the *Unposted Payments* function.

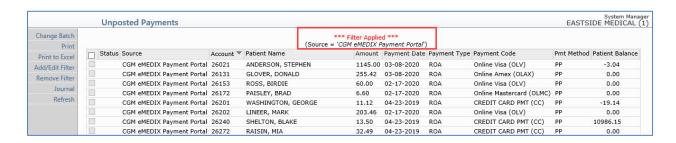
- CGM eMEDIX Payment Portal will display in the Source-column
- PP for Payment Portal will display in the Pmt Method column
- The Payment Codes entered in the CGM eMEDIX Payment Portal Integration function will display in the Payment Code column



You can use the **Add/Edit Filter** Action Column button in *Unposted Payments* to view only Payment Portal payments by selecting the **CGM eMEDIX Payment Portal** option for the **Source** field.



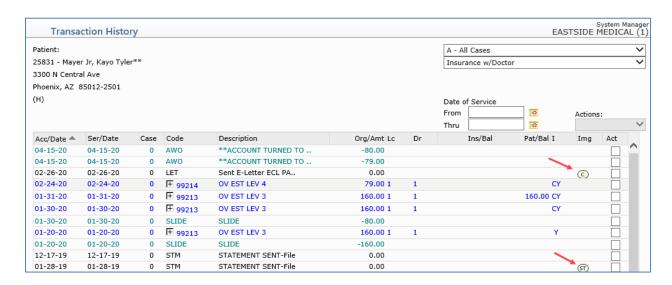
The Filter settings will display at the top of the *Unposted Payments Summary* screen.



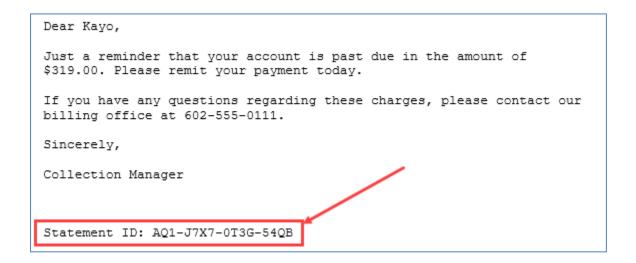


Patient Transaction History - Viewing Payment Portal Payments

The **Payment Portal Statement ID** prints on *Electronic Patient Statements* or *Electronic ECOLLECTIONS*Letters and is required for patients to make an online payment. If the patient happens to misplace their statement or letter and calls the office to ask for the Statement ID, you can look it up from within their Transaction History (*Patient > Change Patient Data > Transaction History*).



You can view the patient's statement or letter that was sent to CGM eMEDIX by clicking on the **ST** icon for a statement or the **C** icon for a collection letter. The Statement ID will display on the bottom of the statement or collection letter.



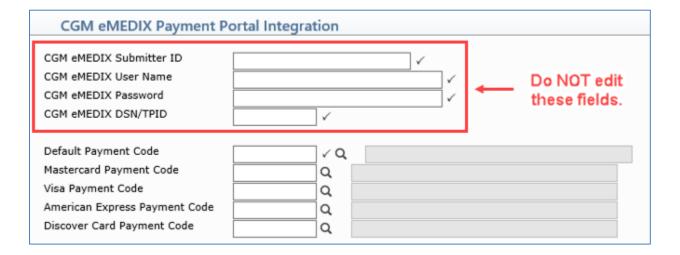


CGM WEBPRACTICE SETUP FOR PAYMENT PORTAL PAYMENTS

CGM eMEDIX Payment Portal Integration

During the Activation process, you indicated which payment codes to use when a payment portal payment is received and the Implementation Team stored those codes in the *CGM eMEDIX Payment Portal Integration* function, located on the *System, Database Maintenance Menu, Integrations* menu.

If you need to edit those codes later, access the function and edit the Payment Codes as needed. You should NOT edit any of the CGM eMEDIX fields in the top portion of the screen as this could prevent payments from processing. Patients will not be able to make payments via the CGM eMEDIX Payment Portal unless all of the required fields have been completed.



Notes

- If multiple databases have been activated, the *CGM eMEDIX Payment Portal Integration* function must be completed in each database.
- If you want to track Payment Portal payments separately from other payments in CGM webPRACTICE, you should create new Payment Codes specifically for Payment Portal.



CGM WEBPRACTICE REPORTS FOR PAYMENT PORTAL PAYMENTS

The reports available to identify Payment Portal payments include:

- Unposted Payments Journal
- Unposted Payments Print to Excel
- Daily Register to Excel
- Transaction Journals to Excel (Payment)

The examples provided show just a few of the printing and sorting options available.

Unposted Payments Journal

With the *Unposted Payments Journal* (*Transactions > Transaction Journals > Unposted Payments Journal*), you can print a report that lists the Payment Portal payments for electronic patient statement payments or collection payments, that have been *stored* but have not been *posted* to the patient account.

After accessing the function, select the **Print in Payment Method Order** check box so the report will provides totals for each payment method.

Unposted Payments Jo	urnal
Print in Patient Order	
Print in Payment Code Order	
Print in User Code Order	
Print in Date Order	
Print in Location Order	
Print in Resp Doctor Order	
Print in Dr Assigned to Pmt Order	· <u> </u>
Print in Payment Method Order	✓
Summary Only	
Print From Date	07-30-2020
Print Through Date	07-30-2020



Unposted Payments Journal (cont.)

All Payment Portal payments are identified by 'PP' in the Payment Method column in addition to listing the Payment Codes entered in the CGM eMEDIX Payment Portal Integration function.

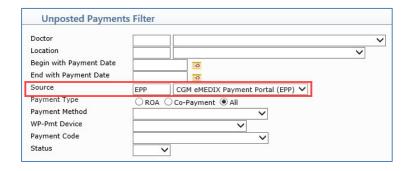
Sep 23,	2020	EASTSIDE MEDICAL Unposted Payments Journal Sorted by Patient From 02-17-2020 Through 03-08-2020			Page 1
Acct	Patient Name	Pmt Date Pmt Type Pmt Method Pmt Cod	le Amount	Loc	Pmt Dr Resp Dr
26021	Anderson, Stephen	03-08-2020 ROA <mark>PP</mark> OLV Total Payments for 26021 - Anderson, Stephen	1145.00 1145.00*		1
26131	Glover, Donald	03-08-2020 ROA PP OLAX Total Payments for 26131 - Glover, Donald	255.42 255.42*		1
26153	Ross, Birdie	02-17-2020 ROA <mark>PP</mark> OLV Total Payments for 26153 - Ross, Birdie	60.00 60.00*		1
26172	Paisley, Brad	02-17-2020 ROA <mark>PP</mark> OLMC Total Payments for 26172 - Paisley, Brad	6.60 6.60*		1
26202	LINEER, MARK	02-17-2020 ROA <mark>PP</mark> OLV Total Payments for 26202 - LINEER, MARK	203.46 203.46*		1
		Grand Total of Payments	1670.48**		
	Report. Transactions/Jour ed by MGR and completed at	rnals/Unposted Payments Journal : 12:13PM on Sep 23 2020			



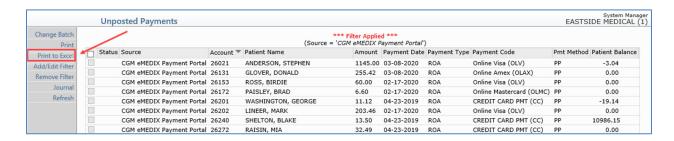
Unposted Payments - Print to Excel

Upon accessing the *Unposted Payments* function, you can filter and print the Payment Portal payments to Excel using the **Print to Excel** Action Column button. There are multiple options to extract and filter the data, but the simplest method is shown below.

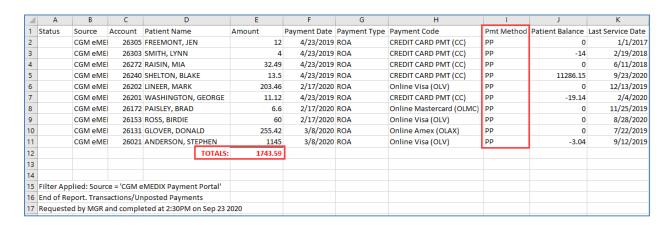
Use the **Add/Edit Filter** Action Column button in *Unposted Payments* to view only Payment Portal payments by selecting the **CGM eMEDIX Payment Portal** option for the **Source** field.



When the filtered payments display, click the **Print to Excel** Action Column button.



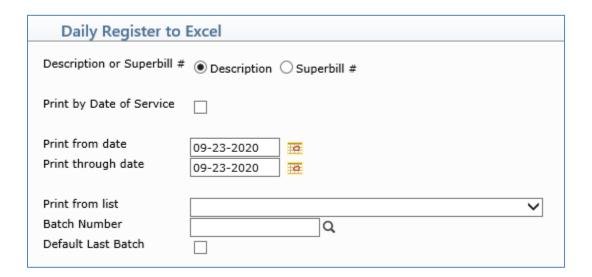
When you have the Excel workbook open, you can total the payment amounts or perform additional sorting or filtering.



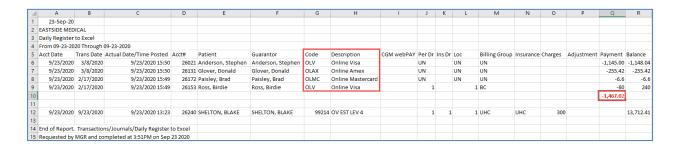


Daily Register to Excel

With the *Daily Register to Excel* (*Transactions > Transaction Journals > Daily Register to Excel*), you can print a report which lists all the transactions posted during a specified range of dates.



When you open the Excel workbook, you can sort by the payment codes (entered in the *CGM eMEDIX Payment Portal Integration* function) and total the payment portal payments.

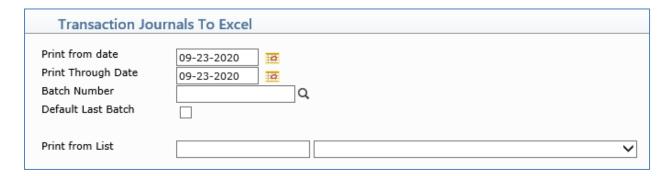




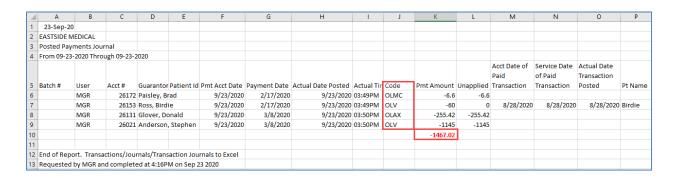
Transaction Journals to Excel (Payment)

With the *Transaction Journals to Excel* (*Transactions > Transaction Journals > Transaction Journals to Excel*), you can print a report which lists all the payments posted during a specified range of dates.





When you open the Excel workbook, you can sort by the payment codes (entered in the *CGM eMEDIX Payment Portal Integration* function) and total the payment portal payments.





CGM EMEDIX REPORT FOR PAYMENT PORTAL PAYMENTS

After payment portal payments have been activated for your practice, you will be able to log on to eMEDIX's website and access the *Statements > Payment Transactions* function to view a listing of all payments received via the payment portal. You will then have options to Copy, Export the payment listing to an Excel, CSV, or PDF file or Print the listing.

For detailed information on the Payment Transactions function, you can access eMEDIX's Online Help: http://online.emedixus.com/static/index.htm#t=Statements%2FPayment_Transactions.htm