

## Take a Payment Quick Guide:

One of the easiest ways to take a payment is from the scheduled appointment in the My SAL Calendar.

Double click on an existing appointment and the **Edit SAL** screen will appear. Click on the highlighted **Take Payment** button.

Subject: **al No Meds (90791), Scheduled, Clyde Hospital, SAL #: SA-aa-4935** Check Availability

Start time: 7/17/2013 10:00:00 AM User Name: System Administrator

End time: 7/17/2013 11:00:00 AM User Group: \*\*\* N/A \*\*\*

Duration: 60 All day event  Status: Scheduled

Client Name: adams, alan Client Group: \*\*\* N/A \*\*\*

Billing Code: Psychiatric Diagnostic Eval No Meds (90791) SAL #: SA-aa-4935

Division: Asheville Note #:

Location: Clyde Hospital Client #: A-C-2126

Room: \*\*\* N/A \*\*\* Group Note #:

Note Group Note Copy Note Client **Take Payment** Statement

Released  Release For Review  Billable  Invoiced  Balance Due: 0.00

Remarks: MU Tracking

Billing Notes: Background: Gray Recurrence

OK Cancel Delete

This pop up window will appear:

What Type of Payment?

What type of payment do you want to create?:

- Take New Payment for This Session (Co Pay, Self Pay, Etc)
- Take New Payment on Client's Account (No Specific Session)
- Bill Client for This Session (No Show, Cancellation, Etc.)
- Open Previous Co Pay/Self Pay for This Session.

Ok Cancel

Select the type of payment and click **Ok** to take a new payment for this session. The **Take a Payment** screen will appear (below). The highlighted areas are required and the **Check/Ref#** is set up for your office. If you know there will be a **Write Off**, the amount can be entered here. Once you have made all entries, click **Save** in the upper left hand corner.

Co-Pay / Self Pay / Take a Payment

Save Copy Attach Existing Note Transaction Summary Receipt Full Receipt Lite Exit

Client: adams, alan (A-C-2126) Session Performed By: System Administrator Service Date: 7/17/2013

Payment Information

Amount Invoiced: 250.00 Invoice Date: 7/17/2013 Printed Remarks:

Amount Paid: 150.00 Paid Date: 7/17/2013 Private Remarks:

Charge Type: 1. Self Pay

Payment Method: Cash

Check / Ref. #: [Redacted]

Billing Code: Psychiatric Diagnostic Eval No Meds (90791) Write Off: [Redacted] Amount Paid for Payroll Purposes: [Redacted]

Invoice #: [Redacted]  
 Note #: [Redacted]  
 SAL #: SA-aa-4935  
 Estimated Charge: 250.00  
 Co Pay: [Redacted]  
 Estimated Co Insurance: [Redacted]  
 Co Pay + Co Ins.: N/A

Primary Insurance Secondary Insurance Tertiary Insurance Totals Payment History Statement Check List

Primary Insurance

Insurance Company: [Redacted] Notes:

Group Number: [Redacted]

Individual Number: [Redacted]

Effective Date: 7/17/2013 Expiration Date: 7/17/2013

Deductible: [Redacted] Co. Pay: [Redacted]

# of Visits: [Redacted] Requires Pre Authorization: [Redacted]

Co. Ins. %: [Redacted] Accepts Assignment: [Checked]

Insured Same As Client: [Redacted] Primary Insured: [Checked]

Name of Insured: [Redacted]

Phone: [Redacted]

Employer: [Redacted]

SSN: [Redacted]

Relationship to Client: Self

Date of Birth: 7/17/2013

Once saved, the **Invoice #** and **SAL #** will populate on the right side of the above screen. You can also print a receipt for the patient. Below is a screen print of the posting for the above transaction.

Today's Totals			
Paid Date:	07/17/2013	Amount Charged Today:	\$ 250.00
Charge Type:	1. Self Pay	Amount Paid Today:	\$ 150.00
Payment Method:	Cash	Today's Balance:	\$ 100.00
Ref #:			

After you finish, click **Exit**, which will take you back to the first screen. Click **Ok** and the payment for the client has been posted for this session.