



## April 2022 TOS PATIENT LIABILITY MODULE

April is here and with it Spring's arrival. Along with the flowers, we've got a new billing feature in bloom called the TOS (Time of Service) Patient Liability and a new look for the Client Chart in Desktop!

The TOS Patient Liability module was developed to meet the high efficacy and speed demands of the admin team. We've built this with ease of use in mind, omitting the requirement of having to go through the SAL, one client at a time, ultimately saving you clicks and more importantly, TIME!

Payment	SAL #	Client	Client #	SAL Date	Time	Performed By	Billing Code	Upfront Charge To Client	Full Session Charge	Amount Paid By Client	Remaining Balance for Session	Card on File	Location	Remarks
Payment	SA-6W-25939	Winchester, Sam	W-C-2332	Friday, February 4, 2022	1:00 PM	Administrat...	90832 psychothera...	\$0.00	\$79.00	\$0.00	\$0.00	<input type="checkbox"/>	Healing House	
Payment	SA-EA-26455	Acosta, Emily	E-C-A15	Thursday, February 3, 2022	2:15 PM	Administrat...	H2012 Day Treatm...	\$38.00	\$76.00	\$0.00	\$38.00	<input checked="" type="checkbox"/>	Healing House	
Payment	SA-EA-26456	Acosta, Emily	E-C-A15	Friday, February 4, 2022	3:15 PM	Administrat...	H2012 Day Treatm...	\$38.00	\$76.00	\$0.00	\$38.00	<input checked="" type="checkbox"/>	Healing House	
Payment	SA-6W-25938	Winchester, Sam	W-C-2332	Thursday, February 3, 2022	1:00 PM	Administrat...	H2012 Day Treatm...	\$0.00	\$76.00	\$0.00	\$0.00	<input type="checkbox"/>	Healing House	
Payment	SA-3A-26482	Abanch, Jimmy	A-C-2064	Friday, February 4, 2022	11:00 AM	Administrat...	H2012 Day Treatm...	\$25.00	\$76.00	\$0.00	\$25.00	<input checked="" type="checkbox"/>	Parker House Recovery	
Payment	SA-3A-26447	Abanch, Jimmy	A-C-2064	Thursday, February 3, 2022	11:00 AM	Administrat...	H2012 Day Treatm...	\$25.00	\$76.00	\$22.00	\$3.00	<input checked="" type="checkbox"/>	Parker House Recovery	

Additionally, this module was designed to be quick, featuring auto-syncing capabilities. That means users from various locations can simultaneously identify charges and take payments, without fear of undoing other team members' hard work.

Upon accessing the module, users will first notice the report is organized into multiple columns. Some columns of note are:

- Upfront Charge – What the client is expected to pay when they arrive (Co-pay or co-pay + Co-insurance or the full amount for clients full self-pay)
- Full Session Charge – The expected amount if the client has 3rd party insurance (the allowed amount if self-pay)
- Remaining Balance for Session – Remaining balance of any unpaid patient responsibility from the Upfront Charge amount
- Last Statement Balance – The client's total due from the last compiled statement. This column won't show if they don't have a compiled statement
- Identifies at-a-glance if there is a credit card stored on the chart

Furthermore, users are able to see in real time if the provider or client made a payment on a session. It also links to the new Client Portal where clients can pay services ahead of time. Talk about a win-win situation!

One last thing to mention before we part; Be sure to check out the renovations we made on the Client Chart in desktop! The Client Details tab has been divided into five drop-down sections which include: Basic information, Administration Information, Insurance, Demographics, Demographics Q&A.

As always, thank you for your continued patience and understanding during this time of accelerated growth. PIMSY Strives towards the goal of exceptional patient care, and are proud to assist you as you assist the nonstop demands of your local communities.