Overview

Availity Revenue Cycle Management is your single source to manage patient payments—integrate claim status, payment, claim detail and history information into a single database. With this patient payments service, you can:

• Give patients the option to pay online using a branded website.
• Process payments for co-pays at the point of service in real-time using a USB card reader or via keyboard entry.
• Integrate your payments directly into Availity Revenue Cycle Management, removing the need to use separate standalone batch terminals.

This service is powered by TransFirst.

NEED ACCESS?

For more information on this module, contact your Client Account Manager (CAM) or Availity RCM Client Services.

WHAT’S NEXT?

Searching and navigating (page 2)
Working with icons (page 3)
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Accessing the Payment Management module

In Availity Central, click the PAYMENTS tab. The Payment Management screen displays (see page 2).

Use the Payment Management module to:

• View real-time credit card, automated clearing house (ACH), and cash transactions performed by an office.
• See payments made by a patient through the Patient Payment Portal.
• View total transactions and dollars processed at the end of each day.
• Use information to balance funds with transactions on a daily, weekly, or monthly basis.

NOTE: At the end of each day, TransFirst automatically completes settlement of all transactions and routes the funds for deposit into your bank account.
Using the Payment Management screen

**SEARCHING**

1. Enter data and make selections in the **Payment Fields** section.
2. Enter data and make selections in the **Followup Fields** section.
3. Click the binoculars icon. Results display in the grid below (b).

**NAVIGATING**

a. Action icons help you work with results in the grid and initiate new transactions. (see next page for details)
b. Results from a search display in the grid. You can click a row to activate applicable icons for that row.
c. Use the options at the bottom to return to Availity Central or navigate through more pages of results.
d. If you have merchant account login information, click **Payment Administration** to display the log in page in a separate window.

**TIP:** Click the vertical bar next to some fields to select from a list of options for that field.

**TIP:** To view more rows (results) at a time, click the arrow next to the word Search. It collapses the search area. Click it again to expand the Search area.
Working with icons

In this module, we refer to records as transactions. Some action icons in this module require you to select a transaction (row) in the results grid before you can use the icon. Other action icons work without a selection. If an icon is not available, it is grayed out.

Click **Refresh** to update results on the screen.
(Keyboard shortcut = F5)

Reduce details in the results by clicking **Hide Second Line** and **Hide Comment Line**. Once hidden, the icons change to show options.

**TO CREDIT OR VOID... WHICH ONE DO I PICK?**

You can credit (refund) and void (cancel) transactions with this tool.

- After a transaction has cleared, select the transaction row and click **Credit Transaction** (c) to issue a refund.
- On the same day a transaction is made, select the transaction row and click **Void Transaction** (b) to cancel it.

Once you select the row and click the icon, the Credit Transaction dialog box displays to help guide you through the process.

**ICON INFORMATION**

a. Click **New Transaction** to enter credit card, ACH, or cash information. See next page for more information.

b. Select row and click **Credit Transaction** to initiate a refund.

c. Select row and click **Void Transaction** to cancel a transaction.

d. Select row and click **View Receipt** to see a receipt for a transaction that was previously processed.

e. Select one or more rows and click **Followup**. The Followup dialog box displays for you to flag transaction(s) for follow-up, mark complete, or clear a flag. You can also designate a user to do the follow-up and add notes.

f. Select row and click **Notes** to view or create notes for the transaction.

g. Select row and click **History**.

h. Click **Payment Report** to generate a report of all payment transactions currently displayed.

i. Select row and click **Support Ticket** to request help for the transaction.

HELP! | Revenue Cycle Management Support | 1.877.927.8000
**Interpreting transaction data**

You can view and print the transaction data in the results grid. Check out these tips:

Each transaction record has three lines of information. To interpret the information contained in lines 1 and 2 of each record, look at the column headers in the green bars at the top of the grid. Line 3 of each record includes comments for that record.

A. Icons display in the first column of each record’s first line when a support ticket, follow-up, or note is associated to the transaction.

B. Once a transaction is submitted, a status will be returned by TransFirst. Status displays in the 1st row in the 4th column.

C. Sort records ascending or descending by clicking a column header. Bright yellow header text indicates a column sorted ascending. Pale yellow means a column sorted descending.

D. The **Origin** column indicates how payment was made by the patient.

E. If someone in your office created the transaction, the **User** field displays the user’s ID.

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**WHAT DO THE STATUSES MEAN?**

<table>
<thead>
<tr>
<th>STATUS</th>
<th>TRANSACTION HAS BEEN…</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approved</td>
<td>Approved for payment to the merchant</td>
</tr>
<tr>
<td>Credited</td>
<td>Credited (refunded) by the merchant</td>
</tr>
<tr>
<td>Denied</td>
<td>Denied (declined) by the issuing bank</td>
</tr>
<tr>
<td>Failed</td>
<td>Failed for processing electronically due to technical issue</td>
</tr>
<tr>
<td>Paid</td>
<td>Paid to the merchant</td>
</tr>
<tr>
<td>Pending</td>
<td>Sent to processing partner and awaits response</td>
</tr>
<tr>
<td>Voided</td>
<td>Voided (cancelled) by the merchant</td>
</tr>
</tbody>
</table>
Processing new transactions

RCM users with access to Patient Payments and associated permissions can process new credit card, ACH Debit, and cash transactions.

STEPS TO SUBMIT A NEW TRANSACTION

1. In Availity Central, click the Payments tab.
2. Click the New Transaction icon. The screen displays.
3. Click a payment tab – Credit Card, ACH Debit, or Cash.
   
   TIP: The ACH Debit screen contains your required fields with red asterisks and some fields with yellow asterisks. In addition to the required fields, you only need to complete one of the fields with a yellow asterisk.

4. Complete the form.
5. Click Submit Transaction.
6. In the Submit Payment? confirmation window, click Yes.

HOW DO CREDIT CARD PAYMENTS WORK?

After you click Submit Transaction, the credit card transaction processes immediately and displays a decline or approved message.

WHAT HAPPENS WITH ACH PAYMENTS?

ACH payments are electronic check payments. Like paper checks, ACH payments are not guaranteed funds until the check has cleared.

CAN WE TRACK CASH PAYMENTS?

Users can manually enter cash payment information, print receipts, and send payment confirmation e-mails. Users can also generate a Payment Report detailing all payments, including cash, received in the office.

The Payment Information section includes fields for the type of payment you need to enter.

For credit card payments, you can click Scan Credit Card to work with a card swipe device to swipe the credit card and auto-populate several fields.

The Patient Statement ID field is an Availity RCM patient statement identifier located on the patient statement coupon. If this field is completed on any payment screen, some fields will auto-populate from the statement. The office must have the patient statements add-on service.

If you scan a credit card, some information auto-populates. If you complete any optional fields, the information can be used for future reporting.