

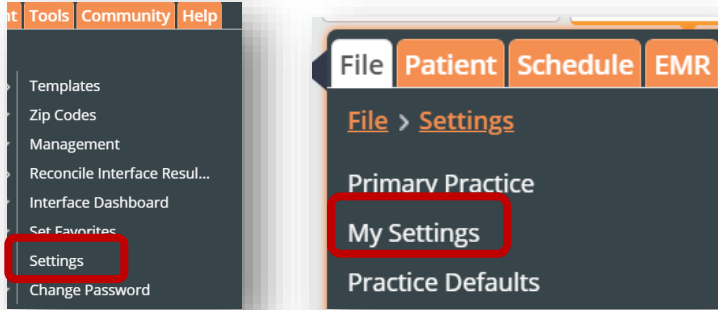
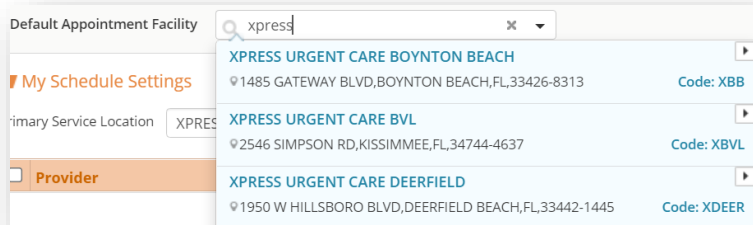


**ECLINICAL WORKS SETTINGS (ADJUST AS NEEDED)**

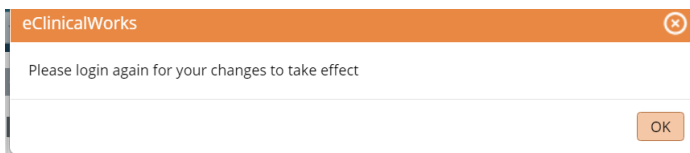
1. Open left side panel  and click on “Menu” 
2. In the Menu section, select “Settings” then “My Settings”



3. In your Settings, in the center “Default Appointment Facility” section search **XPRESS** & always select the physical **Xpress Urgent Care location** where you are physically working.



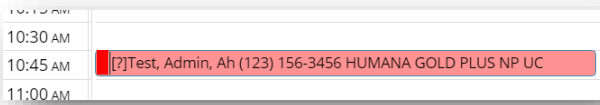
4. Click “OK” then log out and log back in to save all changes



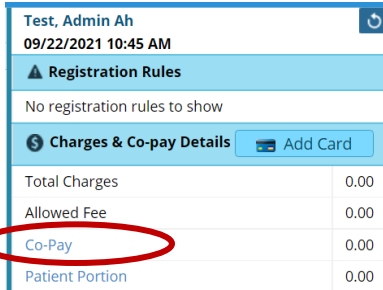
5. Please repeat Steps 1- 4 every time you switch location **ASAP!** This will ensure all daily posted payments are properly documented.

**POSTING PAYMENTS ON ECLINICALS**

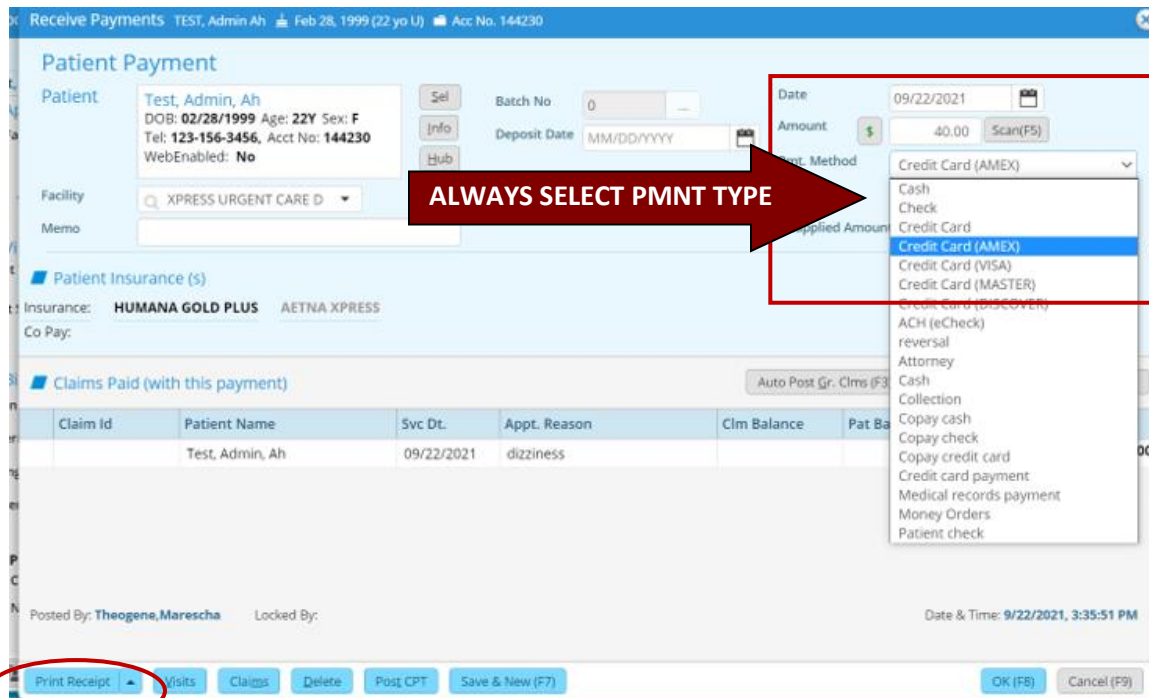
1. Double click patient's name to open appointment window



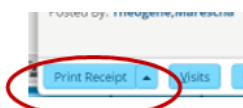
2. On the right-side panel, click "Copay" to post the patient's payment to today's visit



3. Add the amount (\$5 / \$10/ \$50 etc...) / Pmt. Method (CASH/VISA/AMEX/MASTER etc...) **EVERY patient, EVERY payment!**

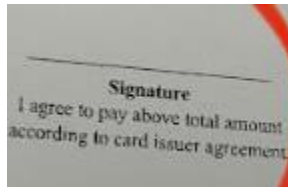
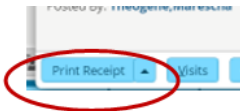


4. **CASH PAYMENTS:** Enter correct amount & pmt. Method, click "Print Receipt" bottom left of window. Print 2 copies: COPY 1- Front Desk will scan in chart / COPY 2- Patient will keep.



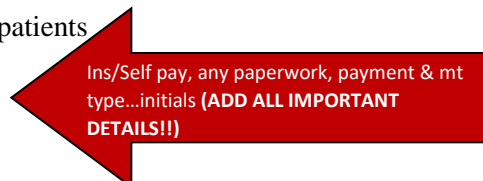
5. **CARD PAYMENTS:** enter correct amount & pmt. Method,
- Click **Green \$ sign** on the left of the amount
  - Select **SWIPE CARD** then swipe the patient's card then click **PROCESS**

- Print 2 copies of the receipt: **COPY 1-** Patient **MUST SIGN** and Front Desk will scan in chart / **COPY 2-** Patient will keep



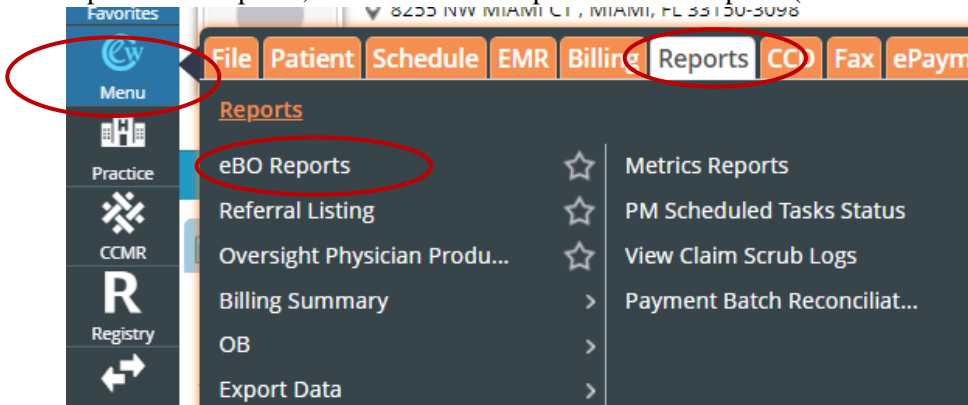
6. When completed, this will create a link in the appointment window.

7. Always add **BILLING NOTES** before checking in patients

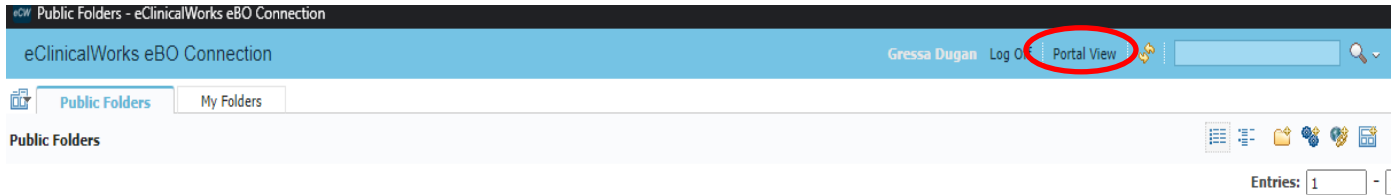


**HOW TO RUN AND PRINT DAILY EBO REPORT**

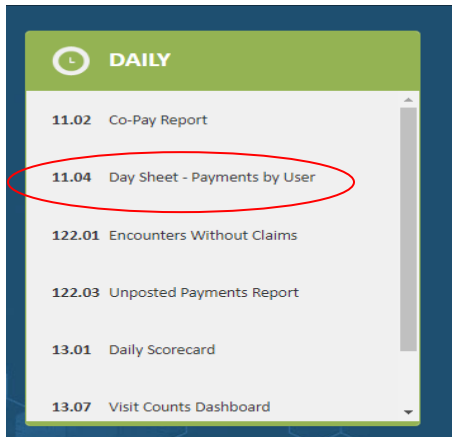
1. Open left side panel, select Menu -> Reports -> eBO Reports (click the star to add to FAVORITES)



2. Click on Portal View

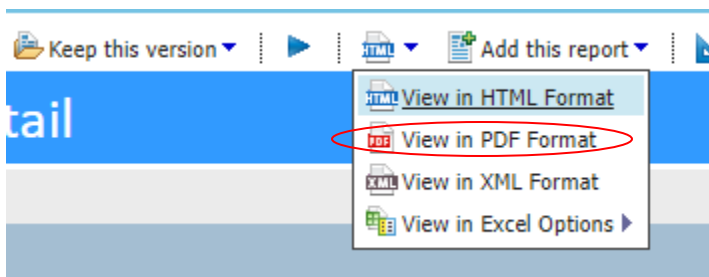


3. Click on DAY SHEET – PAYMENT BY USER



- Change both dates to today's date, make sure SUMMARY and ALL DETAILS are checked
  - On the right side click on **payment facility**
  - Search for your xpress location
  - Click **"insert"** in the center and it will transfer to the right side under **"choice"**
  - Press **"ok"** to run the report

- Once open, view report in PDF format for clearer details



- Print Report to Verify all **Payer** payments are posted with for the correct **total payment** and correct **payment type**

Payment Facility	Payer Type	User Name	Batch ID	Payer	Payment ID	Memo / Notes	Transaction Patient / Guarantor Acct No	Payment Received Date	Payment Type	Total Payment
XPRESS URGENT CARE BOYNTON BEACH	Patient / Guarantor Payment		0		290837		163316	Sep 30, 2021	Credit Card (MASTER)	\$100.00
			0		290793		178564	Sep 30, 2021	Cash	\$100.00
			0		290828		178617	Sep 30,	Credit	\$25.00

7. Verify Total balance on the last page of the report and no payments are left unposted

Payment Facility	Payment Type	Patient / Guarantor Payment	Payer Payment	Total Payment
XPRESS URGENT CARE BOYNTON BEACH	Cash	\$100.00	\$0.00	\$100.00
	Credit Card (AMEX)	\$50.00	\$0.00	\$50.00
	Credit Card (MASTER)	\$125.00	\$0.00	\$125.00
	Credit Card (VISA)	\$220.00	\$0.00	\$220.00
<b>Payment Facility : XPRESS URGENT CARE BOYNTON BEACH</b>		<b>\$495.00</b>	<b>\$0.00</b>	<b>\$495.00</b>
<b>Overall</b>		<b>\$495.00</b>	<b>\$0.00</b>	<b>\$495.00</b>

<b>Total Payment</b>	<b>Payments Posted to Claims</b>	<b>Payments Without Claims</b>	<b>Unposted Payments</b>
\$495.00	\$100.00	\$395.00	

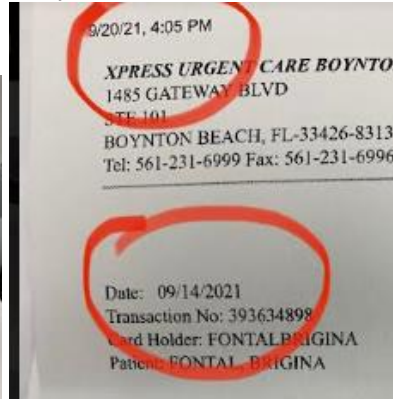
8. **Report any discrepancies to Office Manager ASAP** so that they can be corrected. If payments are not balanced, investigate why! Do not leave for another time. All payments must be captured ACCURATELY EVERY TIME

**DAY TO DAY WORKFLOW**

Upon opening the office, correct your EcW settings- change location (as needed) and all petty cash must be counted (\$100 per location). **Report any discrepancies to Office Manager ASAP.**

eBO Reports will be run three (3) times a day by Front Desk: **11am/ 3pm / 8pm or at closing**

- Verify all payments have been posted correctly (RIGHT patient/ RIGHT amount/ RIGHT pmt method)
- All payments are posted in the correct XPRESS facility **on the date of visit**



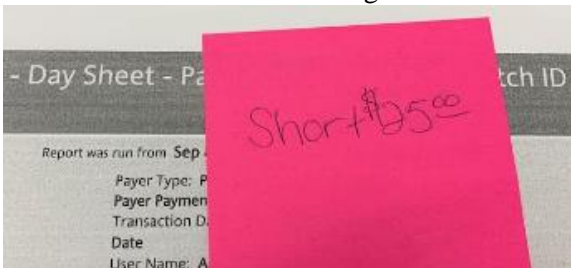
- **BE AWARE!** The Billing Department may post charges in your office from previous patients that will cause your reconciliation to be unbalanced. That is fine as long as that's the only unbalanced quantity, call Billing to confirm chargeback
- **WEEKEND COLLECTION ERRORS-** Write DETAILED Billing Notes so office manager is aware of the issue and can make the right corrections

All billing notes are correctly documented for EVERY patient

- All receipts are scanned in the correct patient's chart right away

Cash Payments must be verified for counterfeit bills with correct counterfeit pens (Not sharpie!)

- All collected amounts including cash is accounted for (INVESTIGATE!)



ALL office managers will DROP OFF reports and cash collection **every Monday (MON-SUN)** in the **Deerfield-Corporate Office to Ambar Batista** and must include:

- Cash Collection in 1 zipped bag, no need to separate each day as long as the amount is the total for the days being submitted
- Weekly **Balanced** Report
- Any discrepancies should have already been fixed by Office manager and/or billing
- All loose cash must be accounted for or credited to patient accordingly

