

Phreesia: Payment Workflow

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About

Phreesia will be working with your practice, during implementation, on a decision of how the practice wishes to retrieve financial balances. The practice can choose between retrieving an **Individual** patient responsible balance and unapplied credits from OP or a **Family** responsible balance and unapplied credits from OP. Your practice's decision on which one of these options you wish Phreesia to utilize from OP will impact the balance/credit amount that is presented to your patients/parents on the Phreesia Financial Responsibility screen during the Phreesia patient intake for that individual patient.

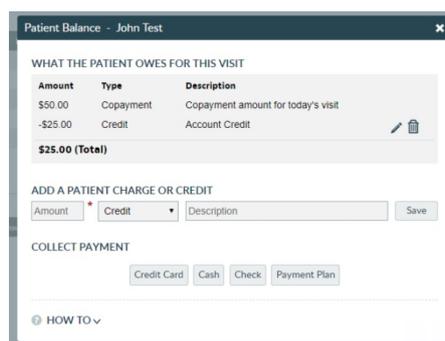


Important: When a payment is made in advance of the patient's scheduled visit, Phreesia has a pre-pay workflow. The payment is authorized and held until the patient shows on the date of the visit. This workflow is used to avoid refunding copays when a patient is a no-show or reschedules the appointment. Phreesia always posts copays and balance payments on the date of visits with a one-click action that occurs on the Phreesia dashboard.

Payments and Payment Posting

During the intake process:

- Phreesia will import and display either the patient individual responsible (net) balance or the family responsible (net) balance. The balance displayed was determined with Phreesia during implementation.
- The patient/parent will have the opportunity to pay the displayed amount in full or set up a recurring automated payment plan.
- The entire payment will appear in OP, on the patient account the patient/parent was completing at the time of intake.
- All payments that post to a patient's OP account will post as a credit on the account.
 - Non-RCM practices will be required to manually apply any credits not successfully applied by the auto-posting logic as is determined by your auto-post setting in System Preferences.
 - RCM practices will have to manually apply any credits not successfully applied by the backend automation logic and OP's RCM team.



The screenshot shows a window titled "Patient Balance - John Test". It contains a table with the following data:

Amount	Type	Description
\$50.00	Copayment	Copayment amount for today's visit
-\$25.00	Credit	Account Credit
\$25.00 (Total)		

Below the table, there is a section "ADD A PATIENT CHARGE OR CREDIT" with input fields for Amount, Type (set to Credit), and Description, and a Save button. At the bottom, there is a "COLLECT PAYMENT" section with buttons for Credit Card, Cash, Check, and Payment Plan, and a "HOW TO" dropdown menu.



Note: For additional information review the section for Auto-Posting setting found on the [Phreesia: Setup in OP](#) article on the Help Center.

Reconcile Phreesia Payments

1. Navigate to the Credits tab of the Billing Center: **Billing tab > Billing Center button > Credits tab**
2. Group and/or filter the data to display and isolate payments by Deposit Source or Staff columns.
3. If grouping, select the **expand grid** checkbox located at the bottom of the window to expand the grid and display the

payment details.

Date	Patient Name	Patient Credit	Patient Debit	Insurance Credit	Insurance Debit	Pay Method	Check #	Note	Staff	Prov	Location
Deposit Source : Balance via External											
		1192.00	0.00	0.00	0.00						
Deposit Source : Copay via External											
		470.00	0.00	0.00	0.00						

- Reconcile the totals, by the method of payment, against Phreesia.
- (Optional) Click the **Print Grid** button to print the grid as it is displayed.

Phreesia Credits from a Patient Chart

All unapplied credits will need to be manually applied to the patient or family balance. You may use the above credit report, as a guide, to applying payments to patient/family accounts.

- From the Chart, search for and select a patient.
- Click **Credits** to view the patient credits window.
- The below Deposit Source are payments received from Phreesia. All payments, received from Phreesia, will have Web Portal User as the user in the Entered by field.
 - Copay via External** Payment was intended to be applied as a copay but can also be applied towards a patient's (individual or family) outstanding balance.
 - Balance via External** Payment was not intended as a copay and should be applied to a patient's (individual or family) outstanding balance.

#	Date	Patient Credit	Patient Debit	Ins Credit	Ins Debit	Insur Carrier	Dep Meth	Deposit Source	Check/Approvals	Payment Trx #	Note	Entered by	Posted Date	Prov	Location	Credit Card Trans ID	Cardholder Name
	03/15/2021	3.00					CC	Balance via External	367			Web Portal User	3/16/2021	Happy OP	K tr5999		Christopher Gipi
	03/15/2021	3.00					CC	Balance via External	367			Web Portal User	3/16/2021	Happy OP	K tr5999		Christopher Gipi
	03/15/2021	50.00					CC	Copay via External				Web Portal User	3/15/2021	Happy OP	K tr41426177		Sam Elliot
	03/15/2021	100.00					CC	Balance via External				Web Portal User	3/15/2021	Happy OP	K tr41426177		Sam Elliot
	03/15/2021	50.00					CC	Copay via External				Web Portal User	3/15/2021	Happy OP	K tr41426177		Sam Elliot
	03/15/2021	100.00					CC	Balance via External				Web Portal User	3/15/2021	Happy OP	K tr41426177		Sam Elliot
	03/15/2021	50.00					CC	Copay via External				Web Portal User	3/15/2021	Happy OP	K tr41426177		Sam Elliot
	03/15/2021	100.00					CC	Balance via External				Web Portal User	3/15/2021	Happy OP	K tr41426177		Sam Elliot
	03/15/2021	50.00					CC	Copay via External				Web Portal User	3/15/2021	Happy OP	K tr41426177		Sam Elliot
	03/15/2021	100.00					CC	Balance via External				Web Portal User	3/15/2021	Happy OP	K tr41426177		Sam Elliot
	03/12/2021	50.00					CC	Copay via External				Web Portal User	3/12/2021	Happy OP	K tr41426177		Sam Elliot
	03/12/2021	100.00					CC	Balance via External				Web Portal User	3/12/2021	Happy OP	K tr41426177		Sam Elliot
	03/12/2021	50.00					CC	Copay via External				Web Portal User	3/12/2021	Happy OP	K tr41426177		Sam Elliot
	03/12/2021	100.00					CC	Balance via External				Web Portal User	3/12/2021	Happy OP	K tr41426177		Sam Elliot
	03/12/2021	50.00					CC	Copay via External				Web Portal User	3/12/2021	Happy OP	K tr41426177		Sam Elliot

Note: If you have set up Family responsible balances with Phreesia, from the Patient Chart you will transfer credits to sibling accounts. For additional information review the [Transfer Credits Between Siblings](#) article on the Help Center.