

Automated Billing Task for Credit Card Payment Error

Last Modified on 12/10/2021 4:03 pm EST

Version 20.14



Note: This content only applies to Practices that are contracted for Instamed payments. It does not apply to Practice contracted with other clearinghouses or an Instamed instance without the payments module are not affected.

Path: Clinical, Practice Management, or Billing tab > Tasks button

About

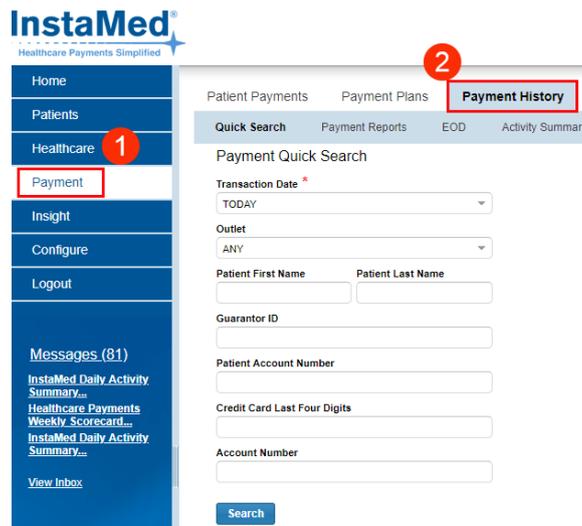
Automated Billing tasks are generated when Instamed credit card payments cannot be posted to a patient's chart due to invalid information. When payment files are processed into OP using the Fetch and Process operation, OP makes an attempt to reconcile Instamed payments. If an invalid patient identification item is detected in a payment, it is not posted to any chart. Instead, a task is created and assigned to the Billing department to indicate to the user(s) that research should be done on the Instamed Portal to reconcile the payment.

7/29/2019		0	Not Started	Bonnie Biller	7/29/2019
Credit card payment error: Could not match Patient () with a \$8.58 credit. (identify patient and post manually)					

Follow the steps below to reconcile the payment and complete the task.

Step 1: Locate the Payment in Instamed

1. Log into your Practice's Instamed Portal.
2. Click the **Payment** tab.
3. Click the **Payment History** tab.



4. Enter the **Transaction Date** or a custom date range to locate the payment.

Step 2: Enter the Credit in the Patient's Chart

After locating the credit in the Instamed Portal, **enter the credit** into the patient's chart and apply it to the open balance. Be sure to select the Pay Method of **Credit Card (on file)**.

Step 3: Complete the Task

After locating the Instamed payment and manually adding the credit to the patient's chart, navigate back to the Task and double-click it to mark it complete.
