

Bill Pay Overview

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Version 20.8

About

OP is excited to offer Bill Pay functionality for practices that use the IntelliChart Patient Portal and InstaMed Merchant Services. This feature ensures that accurate, updated patient balances from OP are displayed in both the IntelliChart Patient Portal as well as the InstaMed Payment Portal on a daily basis.

Payments made on the Patient Portal, using Bill Pay, are posted to OP near real-time as credits. The payments sent in the daily file, from InstaMed, are cross-checked against the near-real-time payments and deduplicated at the point of import into OP.

For practices that currently use both IntelliChart Patient Portal and InstaMed Merchant Services, Bill Pay allows parents/patients to make payments to their outstanding patient balances directly from within the IntelliChart Patient Portal.

Things to Know About InstaMed Patient Balance Updates

- A new file is sent to InstaMed every 12 hours between 6:00 AM and 6:00 PM, as long as there is new data to be sent. If there is no new data, no file will be generated during the time interval.
- The file sent to InstaMed will only include new data and patients, this includes the following changes:
 - Information has been added and/or updated in the patient's register record
 - Any change to the patient's outstanding balance
- There will not be a backload of patient balances when the Bill Pay feature is enabled. Patient and balance updates will be sent during the next time interval.

How to Implement Bill Pay

To implement Bill Pay on the IntelliChart Patient Portal, the following steps must be completed.

- OP Implementation and IntelliChart must first configure this feature for the practice.
- The practice needs to review the Page Templates listed below. You may make changes to the Page Templates to make them practice-specific. Click [here](#) for instructions.
 - Navigate to **Portal Management > Patient Interface > Page Templates > Notifications > Forms**
 - FormNotificationNonPortalUserEmail > System Templates > Portal Non User Form Notification
 - FormNotificationPortalUserEmail > System Templates > Portal User Form Notification
 - Navigate to **Portal Management > Patient Interface > Page Templates > Confirmations > Bill Pay**
 - BillPay Payment Confirmation > System Templates > BillPay Payment Confirmation
- Review the Billing Reminder Consent Form available in the Practice Portal.
 - Navigate to **Portal Management > Patient Interface > Forms Management** For information on modifying the form, see [OP Notify: Modify Billing Reminder Consent Form](#)
- Once OP and IntelliChart have configured Bill Pay and the above steps have been completed, a member of the practice must enable the feature on the Practice Portal by following the below steps:
 1. Log in to the Practice Portal.
 2. Navigate to Patient Interface: **Main Navigation Panel > Portal Management > Patient Interface**
 3. In the **Portal Features** section, confirm the Bill Pay toggle is **ON**.

Once enabled, parents will be able to see the **Pay My Bill** tile on their Patient Portal homepage.

Important: The Bill Pay feature can only be implemented for the following clients. Bill Pay **MAY NOT** be implemented if

your practice only uses the IntelliChart Patient Portal.



- **Instamed Merchant Services:** The Bill Pay feature will be available if your practice uses Instamed Merchant Services. It is not required to have the IntelliChart Patient Portal.
- **Instamed Merchant Services and the IntelliChart Patient Portal** If your practice uses both Instamed Merchant Services and IntelliChart Patient Portal, patient balances may be sent to both. This will allow your parents the flexibility of where they will make a payment.