Using the Time of Service Portal

Quick Guide

The Time of Service Portal is an easy to use guided portal to collect payment on today's service and on prior balances.

The following quick reference guide provides instructions for the most common actions in the Time of Service Portal. Based on how your system was configured, some of the features mentioned in this guide may not be used or you may have additional features not mentioned.

Logging In

Once the registration process is complete, you can take a payment for today's service.

1. Open your browser and type the following web address https://tos.zotecpartners.com
2. Enter your Username and Password.

After 15 minutes of inactivity in the Time of Service portal, you are logged out and must log in again to use the portal.

3. Do you have access to more than one location?
   - No, skip to the next step.
   - Yes, if this is your first time logging in, select the appropriate location by typing it in the location box, or by clicking it from the list.
   - Yes, if you have previously logged in and selected a location, the system defaults to the previously selected location.

Finding an Existing Patient

1. In the search field, enter the patient's name, account number, date of birth, or MRN. As you start typing a list of matching patients appears.
2. Select the appropriate patient.

You are guided through the steps with the progress bar shown on the bottom of the screen.

Adding a New Patient

1. Click ADD NEW PATIENT.
2. Enter the patient's information:
   - First Name, Last Name
   - Medical Record Number (if applicable)
   - Gender and Date of Birth
   - Street Address 1 and Street Address 2 (if applicable)
   - Zip Code (automatically completes the city and state fields)
3. Click Next.
4. Enter the patient's mobile phone number and email address, if the patient wishes to provide it.
5. Click Next.
6. If there are additional contact number(s), click Yes and input the additional phone number(s).
7. If there are no additional contact number(s), click No to skip.

Entering the Service Amount and Collecting a Payment

1. If a payment amount appears for the services, click Next to take a payment.
2. If a payment amount does not appear, do one of the following:
   - Select the appropriate Appointment Type from the list and the Payment Amount displays the amount associated with the selected appointment type. Click Next to take a payment.
   - Type a value for the Payment Amount and click Next to take a payment. A minimum payment amount of $1.00 is required.
3. Ask what payment method the patient would like to use for the estimate for today's services.
4. Select a payment method. Refer to the section on the selected payment method for information on completing the payment.

Working with a Prior Balance

If the patient has any open prior balance, the Pay Prior Balance Only button appears. You may collect on the prior balance only, or you can collect on the prior balance and the amount for today's service.

1. Click Pay Prior Balance Only to continue to the payment screen to pay only the prior balance.
2. Or click Next to continue to the payment screen to pay the prior balance amount and the estimate for today's service.

3. Select a payment method. Refer to the section on the selected payment method for information on completing the payment.

A payment on a prior balance amount cannot be changed or refunded in the TOS Portal.

Cash/Money Order Payment

1. Collect the cash or money order from the patient.
2. Enter any required notes and click Next.
3. On the receipt screen, do one of the following:
   - If the patient wants an electronic receipt via text message or email click SEND ELECTRONIC RECEIPT. The patient's phone number, if known, is automatically selected. If the patient prefers another contact method, enter a different phone number or email address. If there is no mobile number or email address this option is not available.
   - If the patient does not want an electronic receipt, click GENERATE PRINTED RECEIPT.
4. Click COMPLETE ENCOUNTER.

eCheck or Check Payment

1. For eCheck, enter the patient's first and last name. Using the patient's check, type the bank routing number and account number. Enter any required notes and click Pay With eCheck.
2. For Check, using the patient's check, type the check number. Enter any required notes and click Next.
3. On the receipt screen, do one of the following:
   - If the patient wants an electronic receipt via text message or email, click SEND ELECTRONIC RECEIPT. The patient's phone number, if known, is automatically selected. If the patient prefers another contact method, enter a different phone number or email address. If there is no mobile number or email address this option is not available.
   - If the patient does not want a text, click GENERATE PRINTED RECEIPT.
4. Click COMPLETE ENCOUNTER.

Credit/Debit Card Payment

1. Do you have a credit card machine?
   - Yes, what type of credit card machine is available?
     - Chip reader: Once the card reader is detected click next and follow the prompts on the screen.
     - Card swiper: Click SWIPE CARD and swipe the card.
   - If no credit card machine is available, enter the following information:
     - Credit card number
     - Name on the credit card
     - Expiration date (month and year)
     - CVV code
2. Enter any required notes and click Pay With Credit Card.
3. On the receipt screen, do one of the following:
   - If the patient wants an electronic receipt via text message or email click SEND ELECTRONIC RECEIPT. The patient's phone number, if known, is automatically selected. If the patient prefers another contact method, enter a different phone number or email address. If there is no mobile number this option is not available.
   - If the patient does not want a text, click GENERATE PRINTED RECEIPT.
4. Click COMPLETE ENCOUNTER.

Automatic Payment After Insurance

You may or may not have the ability to perform After Insurance payments. Refer to your Zotec Partners contact.

Once insurance adjudicates the patient's card is charged up to the amount entered. If the amount is less, the patient is charged the amount remaining after the insurance adjudicates. If it is more, the patient is charged the amount entered and billed for the remainder. When a card is declined the patient is billed.

1. Refer to the steps in the Credit/Debit Card Payment section for completing an After Insurance payment.
2. Inform the patient that the card will be charged up to the estimated amount once insurance adjudicates.

Pay on Patient Device

Patients can choose to pay for today's services on their own device. A text or email is sent to the patient with a link to complete their payment.

1. Click PAY ON PATIENT DEVICE.
2. The patient's phone number, if known, is automatically selected. If the patient prefers another contact method, enter a different phone number or email address.
3. Click NEXT.
4. The patient is sent a real-time text or email to complete their payment. The status of their progress is shown on the Waiting for Patient screen.
   - If the patient wishes to change their contact method or the link times out, click Resend Payment Link to return to the contact method selection.
   - If the patient wishes to change their payment method, click Cancel Payment Request to return to the payment screen.
5. After the patient completes their payment, you can continue with the encounter.
   - The patient cannot change the payment amount on their device. If the patient requests a different payment amount, click Cancel Payment.
6. The patient will automatically be sent an electronic receipt.

Creating a Payment Plan

When a payment plan is created, the plan is created with equal payments with the first payment being today. Today's charges and prior charges cannot be combined and included in a new payment plan. If a patient has prior balance charges and NEW PAYMENT PLAN is selected, the prior balance is not included in the new payment plan.

A patient may only have one payment plan for a client or billing group. When a patient already has a payment plan set up, the existing payment plan details will show and the ADD TO EXISTING PAYMENT PLAN button will show.

1. From the payment screen, click NEW PAYMENT PLAN.
2. If the patient has an outstanding balance, process a payment for today's services and click COMPLETE ENCOUNTER. Click YES to the message that asks if you want to set up a payment plan. When no outstanding balance exists, skip to the next step.
3. Review and adjust the number of payments, monthly payment amount, and/or duration. The current balance amount is the payment plan amount and cannot be changed. The plan start date defaults to the current date. Changing the start date, updates the end date.
4. Select a payment method. Refer to the section on the selected payment method for information on completing the payment.
5. Click ESTABLISH PLAN.
6. On the receipt screen, do one of the following:
   - If the patient wants an electronic receipt via text message or email, click SEND ELECTRONIC RECEIPT. The patient's phone number, if known, is automatically selected. If the patient prefers another contact method, enter a different phone number or email address. If there is no mobile number or email address this option is not available.
   - If the patient does not want an electronic receipt, click GENERATE PRINTED RECEIPT.
7. Click COMPLETE ENCOUNTER.

Creating a New Payment Plan With a Prior Balance

1. Process a payment for today's services and click COMPLETE ENCOUNTER.
2. Click YES to the message that asks if you want to set up a payment plan.
3. Refer to the steps in the Creating a New Payment Plan section.

Creating a Payment Plan and Paying on Patient Device

When creating a payment plan, patients can choose to make the initial payment on their own device. A text or email is sent to the patient with a link to complete their payment.

1. From the payment screen, click NEW PAYMENT PLAN.
2. Review and adjust the number of payments, monthly payment amount, and/or duration. The current balance amount is the payment plan amount and cannot be changed. The plan start date defaults to the current date. Changing the start date, updates the end date.

3. Click PAY ON PATIENT DEVICE.
4. The patient's phone number, if known, is automatically selected. If the patient prefers another contact method, enter a different phone number or email address.
5. Click NEXT.
6. The patient is sent a text or email to complete their payment. The status of their progress is shown on the Waiting for Patient screen.
   - If the patient wishes to change their contact method or the link times out, click Resend Payment Link to return to the contact method selection.
   - If the patient wishes to change their payment method, click Cancel Payment Request to return to the payment screen.
7. After the patient completes their payment, you can continue with the encounter.
   - The patient cannot change the payment amount on their device. If the patient requests a different payment amount, click Cancel Payment.

Adding Charges to an Existing Payment Plan

A patient may only have one payment plan at a time. When a patient already has a payment plan set up, the ADD TO EXISTING PAYMENT PLAN button appears. Prior balances and today's services can be added to an existing plan.

NOTE: If the patient is set up for a manual payment plan where payments are mailed in, the ADD TO EXISTING PAYMENT PLAN button will not appear and the patient must contact Zotec billing.

NOTE: Today's services can only be added to an existing payment plan when DFT is received prior to checkout.

Click ADD TO EXISTING PAYMENT PLAN to display the current amount due, the balance on the existing payment plan, and the balance, amount due, and duration on the new payment plan. Refer to the steps in the Creating a Payment Plan section for the steps on updating the existing payment plan.

NOTE: An initial payment can be made, but is not required, when adding charges to an existing plan.

The payment method or account utilized for the payment plan can be updated when adding charges to an existing payment plan.

Canceling a Payment Plan

When a payment plan is set up with an electronic check, or if a refund is issued on a credit card payment that is associated with a payment plan, you can cancel a payment plan. This option is only available for one day after the date of service for electronic checks and one day after the last refund for credit cards.

To cancel a credit card payment plan:

1. On the Receipts & Refunds screen, search for the credit card payment with the payment plan you want to cancel. To cancel a payment plan created with a credit card, the payment for today's services must first be refunded.
2. Click ISSUE FULL REFUND to the right of the payment you want to refund. Enter the Refund Amount and any Notes and click CONFIRM to refund the initial payment.
3. If a payment plan is found, the Cancel Payment Plan screen displays.
4. Click YES to cancel and delete the payment plan.
5. When the second message displays to confirm that you want to cancel the payment plan, click YES.
6. A message will display at the top of the Receipts & Refunds screen to confirm that the payment plan was canceled.
7. Click NO if you do not want to cancel and delete the payment plan. If you do not cancel the payment plan, the patient will continue to be billed for monthly payments.

To cancel an electronic check payment plan:

1. On the Receipts & Refunds screen, search for the electronic check payment with the payment plan you want to cancel. Since electronic check payments can't be refunded, the button in the Refund/Payment Plan column displays as CANCEL PAYMENT PLAN.
2. Click CANCEL PAYMENT PLAN to display a message confirming that you want to cancel the payment plan.
3. Click YES to cancel the payment plan, and a message will display at the top of the Receipts & Refunds screen to confirm that the payment plan was canceled.

After canceling a payment plan, a line will print on the original receipt, and on the refund receipt for credit cards, showing the payment plan amount and date that was canceled.

Processing a Time of Service Refund

If the original payment was made via credit card, the refund is applied to the credit card. Refunds for all other payment types must be handled by the front desk.

1. In the upper left-hand corner, click Receipts & Refunds.
2. Enter the transaction date and patient ID or MRN and click SEARCH.
3. The screen displays results based on your search criteria.
4. Click ISSUE FULL REFUND for the appropriate payment to display the payment details.

   If you do not have permission to perform a refund, an administrator must enter an override code.

5. Leave the defaulted refund amount. This will refund the entire transaction.

   Only Today's Service payments can be refunded. Payments made toward prior balances cannot be refunded through the TOS Portal.

6. Enter a comment to document why the refund is occurring.
7. Click CONFIRM.
   - When a refund successfully processes, the message Refund Successful displays.
   - If the refund fails to process, the message Refund Failed displays.

Patient Reporting

1. To display the Patient Payments Report, click the Reports menu.
2. To specify the details to include in the report, complete the following fields:
   - Date Filter defaults to Deposit Date. Click the Date Filter arrow and select Transaction Date to generate the report data based on the transaction date.
   - To include all users, leave the default of blank. Otherwise, to print the report for a specific user, select either User ID or User Email and type the appropriate user information.
   - To include all locations, leave the default of All Locations. Otherwise, to report on a specific location, click the Location arrow and select the appropriate location.
   - To include all Payment Methods, leave the default of All Payment Methods. Otherwise, to report on a specific payment method, click the arrow and select the appropriate payment method
   - The Start Date and End Date default to the current date. To run the report for a different date range, type the beginning and ending dates for the transactions to include in the report. Transactions included are from midnight of the start date t to 11:59 PM of the end date.
   - To change the report type from the default type of PDF, to an Excel spreadsheet, click the Export option arrow and choose Excel. Otherwise, skip this step.
3. Click GENERATE REPORT.

   Use the table below to understand the fields in the report.

Resources

Click the "?" icon in the bottom left corner to view resources such as videos and quick guides.

Links

Links to other information are available under the patient's name, date of birth and MRN number at the top of the screen.

- Inquiry – Access Patient Investigations and view information about the patient's charges including original fees, Time of Service payments, insurance payments, payments made by the guarantor, and remaining balance.

  Please review the PATIENT INQUIRY GUIDE for additional information.

- Itemized Bill – Enter a date range to see a statement that includes all charges for the specified date range.
- Statement – View the most recent statement sent to the patient.

Patient Payments Report Fields

Field Name	Field Description
Location	This is the Location the Time of Service payment was taken
Patient ID	This is the PersonID for the patient
Patient Name	Name of the patient associated with the payment
Transaction Date	Date the payment was taken in the Time of Service portal
Trans Code Description	Payment method used
Refund Payment Method	Payment method used for refund
Deposit Date	Date the payment was posted in the Electronic Billing Center to the patient's account
Check Number	Number for the check entered in the Time of Service Portal when the payment type is check. If another payment type was used, it is blank
Today's Services CPT(s)	Procedure codes utilized in TOS estimate
Amount	The dollar amount paid for the service
Posted	Yes, the payment is posted to the patient's account
Paid In Full	Yes/No; corresponds to if the paid in full checkbox was selected or not on the Services screen
Remote Payment	Yes/No; corresponds if the Pay on Patient Device pay method was utilized
User ID / User Email	ID or email (login) of the user who completed the payment in the Time of Service Portal
Notes	Anything that was typed in the Notes field while taking the payment in the Time of Service Portal