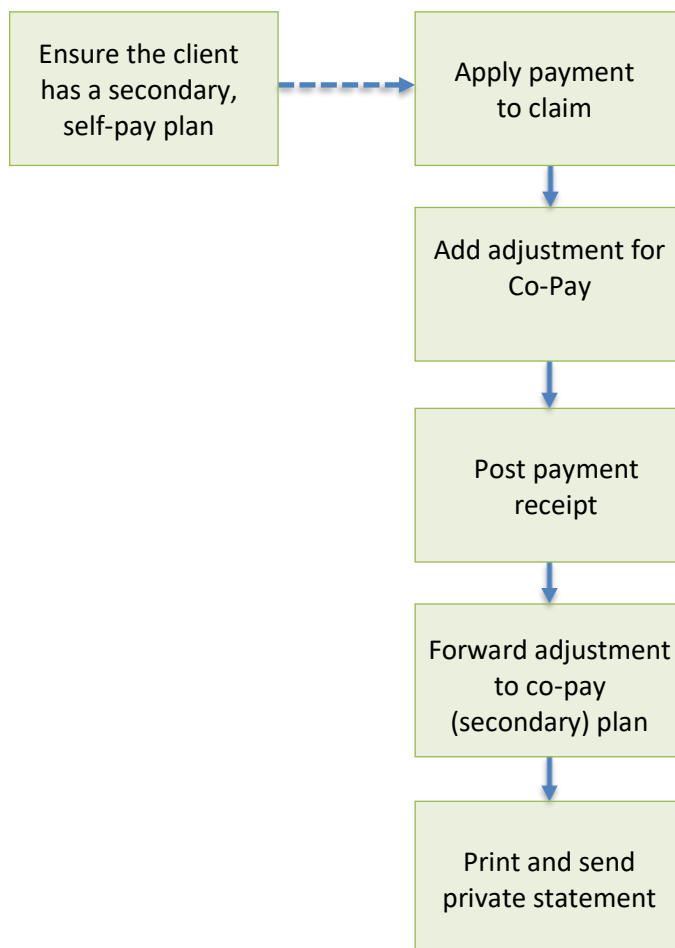# Home Health Care

PointClickCare®

Reference Guide:
Creating a copay/coinsurance invoice from a FFS claim

Overview

Many payer plans include co-pays that are the patient's responsibility. To handle a co-pay for a client, you will need to make sure the client has a Self-Pay payer/plan set as a secondary payer. When posting a payment from the client's primary plan, add a co-pay adjustment and indicate that you want to forward the adjustment to the secondary self-pay payer/plan. Home Care then creates a self-pay statement for the co-pay. This workflow only works on payers that have the same reimbursement type (ex: FFS to FFS). If you need to create a copay for a payer with differing reimbursement types (ex: PDGM to FFS), please follow our additional guide on this topic.

```
┌─────────────────┐        ┌─────────────────┐
│ Ensure the client │─ ─ ─▶│  Apply payment  │
│ has a secondary,  │       │    to claim     │
│  self-pay plan    │       │                 │
└─────────────────┘        └─────────────────┘
                                    │
                                    ▼
                           ┌─────────────────┐
                           │ Add adjustment for │
                           │     Co-Pay      │
                           └─────────────────┘
                                    │
                                    ▼
                           ┌─────────────────┐
                           │  Post payment   │
                           │    receipt      │
                           └─────────────────┘
                                    │
                                    ▼
                           ┌─────────────────┐
                           │ Forward adjustment │
                           │   to co-pay     │
                           │ (secondary) plan │
                           └─────────────────┘
                                    │
                                    ▼
                           ┌─────────────────┐
                           │ Print and send  │
                           │ private statement │
                           └─────────────────┘
```

Set up a Secondary Payer for Self-Pay

1. Navigate to the client's chart and select **Financial Record > Payers** and click **Add**.

2. In the **Plan** tab, select Self Pay in the **Payer** field and complete details, being sure to set the **Plan Priority** to Secondary.
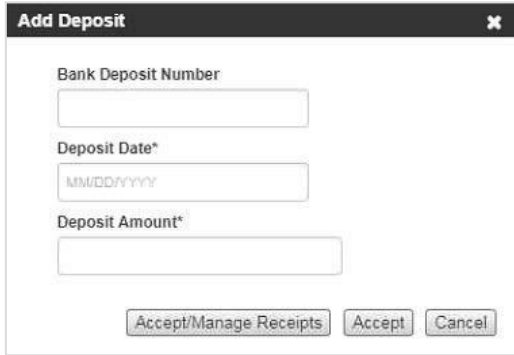

Set **Plan Priority** to Secondary.

Note: Relationship refers to the person responsible for the payment. Subscriber Name and Address identify the address that appear on the private-pay statement. If Self is selected for Relationship, subscriber name and address are not required because the information is already in the system.

3. Click **Accept**.

Apply the Payment from the Primary Payer

1. Go to **Agency>Payments>Deposits**.

2. Click **Add** Deposit and enter deposit details.

3. **Click Accept/Manage Receipts** to add receipts to the deposits. (If you need to save your work and finish the receipts at another time, click **Accept.**)

4. Click **Add** next to **Receipts**.

5. Enter receipt details.

6. Click **Accept/Apply Payments** to choose a claim and apply payments to the claim. (**Accept** saves the entry to complete later.) When you click **Accept/Apply Payments**, the **Payment** interface appears. You can begin applying payments.

7. Click **Add** next to **Payments**. The **Add Payment** dialog appears.

8. Click **Select Claim** from the **Add Payment** dialog. From the **Select Claim** dialog, click on the Claim you want to apply the payment to, click **Accept**

9. Enter the amount of the payment.

10. Under the adjustments within the payment of the claim click **Add** to add a patient responsibility if it is not present. If the adjustment is present, click **Apply** to enter the adjustment type and apply it to the claim balance, click **Accept**.

11. On the **Deposit** screen, click **Post Receipt**.

Forward Co-Pay to Secondary Payer

12. Navigate to the claim by selecting the **claim hyperlink** within the deposit, this will bring you to the claim screen where you will select the **claim hyperlink** again.

13. Navigate to the **Actions** button within the page and select **Forward**, in the **Forward Claim** dialog, select the secondary payer that is responsible for the co-pay and click **Accept**. This generates a self-pay statement for the co-pay.

14. Go to either the **Client > Financial Record >New Claims** queue or the **Agency > Billing > New Claims** queue to view and print the self-pay statement.