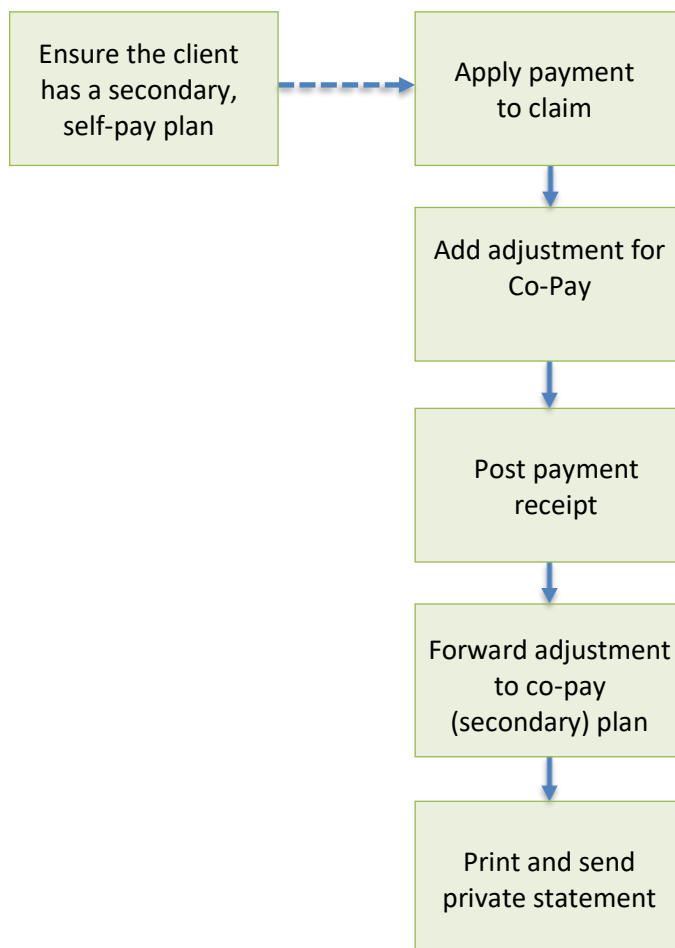


## Reference Guide:

### 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.



## 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.

The screenshot shows the 'Edit Patient Plan' window with the 'Plan' tab selected. A green box highlights the 'Plan Priority\*' field set to 'Secondary' and the 'Relationship\*' field set to 'Self'. Other visible fields include Payer\* (Self Pay), Plan\* (Monthly Billing - Visit & Hour), Member ID, Group Number, Medicare Part D checkbox, Coverage Start Date (10/01/2019), Coverage End Date, Subscriber Name\* (First, Middle (Optional), Last), Address\* (City, State, Zip), and three User Defined fields.

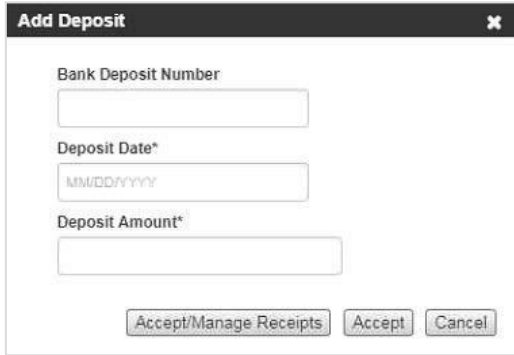
**Set Plan Priority to Secondary.**

**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**.

Adjustments Add

Adjustment Category	Adjustment Type	Group Code	Reason Code	Amount	Details	Actions
Claim	Co Pay	PR	3	\$4.00		<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Apply</a> <a href="#">Review</a>
Claim		CO	45	(\$2.01)		<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Apply</a> <a href="#">Review</a>

1 / 1 | 5 items per page | 1 - 2 of 2 items

Delete Accept Cancel

**Edit Adjustment** ✕

Adjustment Category\*

Claim Adjustment  
 Service Adjustment

Group Code\* PR - Patient Responsibility ▼

Reason Code\* 45

Amount\* 4.00| ▼

Adjustment Type\* Co Pay ▼

Accept Cancel

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.

▼ Claim Number	▲ Invoice Number		
000000000455	000000000761		
000000000361	000000000628		

		▼ Number
<a href="#">Print</a>	<a href="#">Resubmit</a>	000000000761
		000000000737

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.

The image shows two screenshots. The left screenshot shows a 'Services' page with a dark navigation bar containing 'Actions', 'Forward', 'Payments', and 'Adjustments'. A red arrow points to the 'Forward' button. The right screenshot is a 'Forward Claim' dialog box. It has a title bar with a close button. Below the title bar, there is a 'Patient Plan\*' dropdown menu with 'Self Pay - Self Pay (12/01/2016 - )' selected. A red arrow points to this dropdown. At the bottom right of the dialog, there are two buttons: 'Accept' and 'Cancel'. The 'Accept' button is highlighted with a red box.

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.