User Manual – SelfPay Works 4.7

Overview

Welcome to SelfPay Works 4.7 (SPW 4.7)

Acryness continues to enhance our suite of online revenue cycle solutions. SelfPay Works is an application platform for the access, deployment and management of a wide range of payment and billing support tools.

There are enhanced features and a cleaner visual look to this application in order to be more user friendly. Acryness, SPW version 4.7 release continues to enhance the user experience as we prepare for a credit card present method of payment.

Purpose

To provide step by step instructions and helpful hints needed by client specific users for all features and functionality within the SPW 4.7 website interface.

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Website User Interface Login

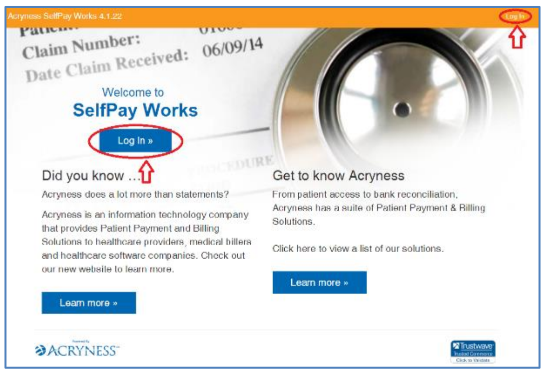
I. Login to Client Portal SPW 4.7

A. Client User Login

At this step, this login is specific to the user that has already been setup by the Acryness or Client administrator. The User must confirm their email address and set a password when the administrator completes the Add New User function in the next section of this manual

i. Navigate to http://selfpayworks.acryness.com/

ii. Select Log in



iii. Login requirements will appear on the screen

iv. Enter your username which is your email address

v. Enter password

- If you do not remember your password, select forgot password.
- If you enter the wrong password 4 times, your account will be locked. If you are locked out, you can contact Acryness to unlock your account, and then use forgot password in order to reset.

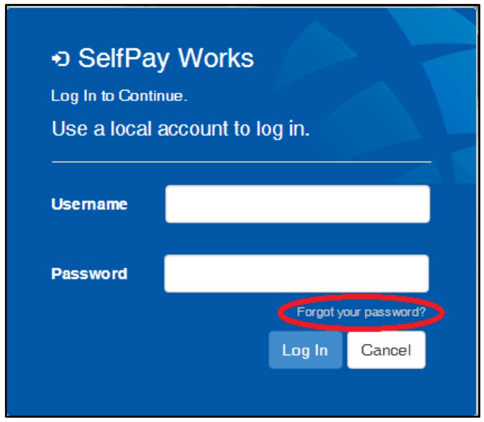
vi. Select login

vii. Redirected to the landing page with all user features available

Website User Interface Login

B. Forgot Password Reset Instructions

i. Navigate to the SPW website
ii. Select Log in
iii. Select “Forgot your password?”



iv. Enter your email and select email link
v. Go to your email and follow the instructions provided
vi. You are redirected to a page to reset your password
vii. Enter all required information

Password requirements: must include upper and lower case letters, at least 1 numeral and 1 special character

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Administrative Menu Options and Features

Step 1: Create a User

a. Once created, the User will receive an email to validate their access and set a password in the login screen of SPW 4.7

Step 2: Assign the User to the Client

Step 3: Create a Role – 2 methods

a. Name the role based on the user's job title, and assign permissions for all of the specific job responsibilities

   EXAMPLE: **Role: CSR1**

   Permissions: Search Accounts, Payments, Recurring Payments & Statements; Create Payments & Recurring Payments; Edit & Cancel Recurring Payments

b. Name the role based on a group of permissions

   EXAMPLE: **Role: View & Search**

   Permissions: View Role & Statement; Search Statement, Accounts, Payments, Recurring Payments & Transactions

   Role: Create, Edit & Reverse

   Permissions: Create Payments & Recurring Payments; Edit Recurring Payment; Reverse Payment; Delete Recurring Payments

Step 3: Assign the Role to the User

a. Assign the specific job title role to the User with these job responsibilities
b. Assign several roles to a User based on their job responsibilities

Administrative Menu Options & Features

I. Users

Only the users who have been assigned the permissions to create, view & edit users will utilize this feature and follow these steps through the Administrative Menu by selecting Users from the drop down.

A. Add New User

i. Click

ii. Fill in ALL fields and click Create

When this step is completed, an email will be sent to the address provided during this setup to complete the new user system access.

B. Assign New User to Client(s)

i. Locate the new user by entering information in the name field. **NOTE: Do not select your client name from the drop down menu.**

ii. Click next to the user name

iii. Select the Client Association tab

iv. Select the client(s) that the new user should have access to. There may be more than 1 selected by holding the **Ctrl** key.

v. Click Save

Please refer to **II. Roles, section C** for instructions of how to assign permissions to your new user. **NOTE: If you don't assign a role to the new user, they will not be able to perform any functions within the system.**

C. Edit Existing Users

i. Locate the new user by entering information in the fields provided.

- It is recommended that you select a client from the dropdown box in order to obtain more exact results for a User Search
- If you leave the other fields blank, you will receive results of all users assigned to this client

ii. Select next to the user name that needs editing

(Steps are continued on the next page)

- iii. Make any changes needed in each tab
  1. Demographics: update contact information
  2. Client/Department: update client and department assignments
     - Results here are based on selections in the Client Association tab. At least 1 selection is recommended but not required in order to have complete user metrics available.
     - Departments are only available if a client has them setup
- iv. Client Association: add or remove access to specific client information

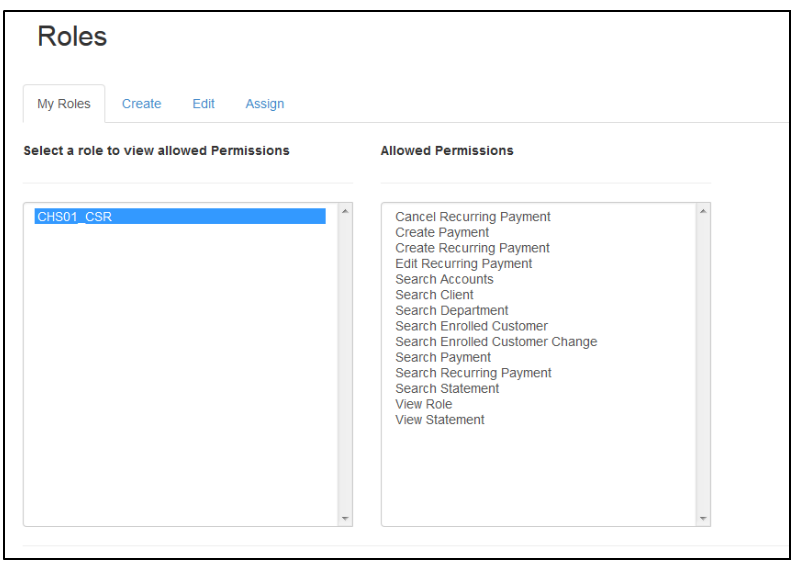
II. Roles

Only the users who have the assigned permissions to create, edit or delete roles will use this feature and follow these steps through the Administrative Menu by selecting Roles from the drop down.

A. View Role

- i. Go to Administrative menu and select Roles
- ii. Select the My Roles tab

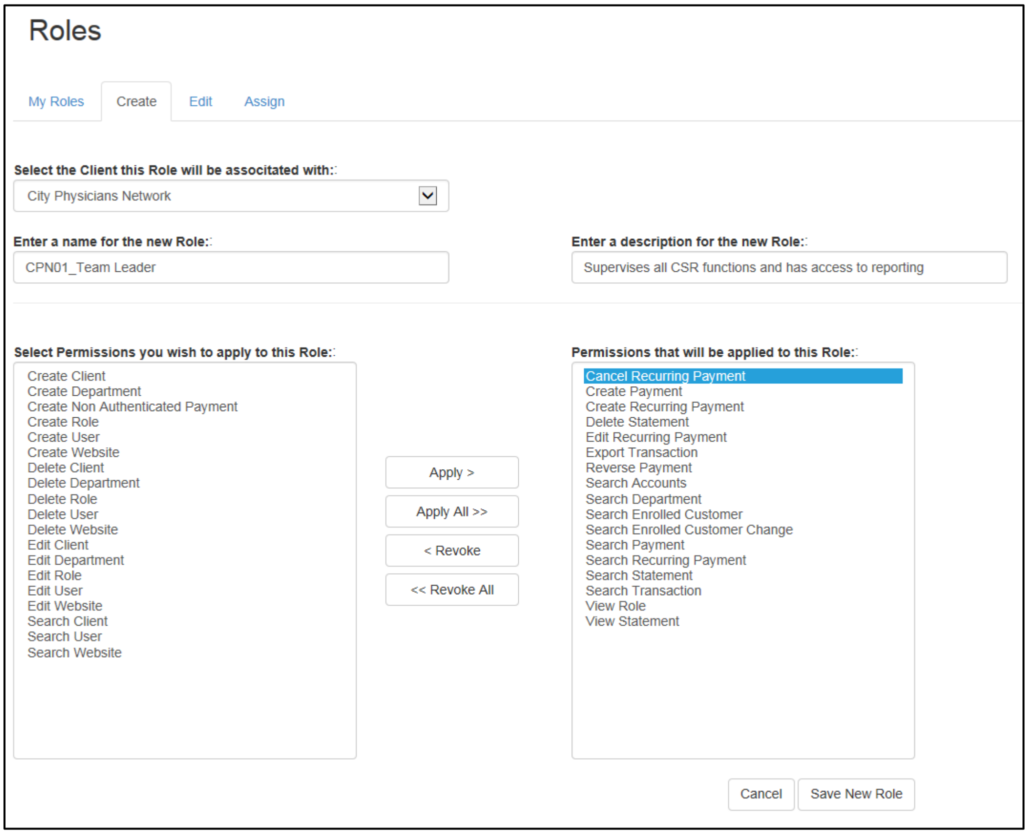
  There should only be 1 option listed here to view. This is the role that was assigned to the user as set up by an Administrator.
- iii. Select the role in the left information box
- iv. Verify that the permissions are shown in the right Allowed Permissions box

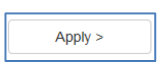


(Steps are continued on the next page)

Administrative Menu Options & Features

B. Create New Role
   i. Select the Create Tab
   ii. Select the client name
   iii. Enter a name for the role
   iv. Enter a description of the role (job duties as assigned)
   v. Select the allowed role permissions.



   vi. Click 

 and verify the permissions have transferred to the "Permissions that will be applied to this Role" box and select Save New Role.
   vii. Click Save New Role

Administrative Menu Options & Features

Examples for roles with permissions

1. Manager
   - View, Create, Edit, Delete & Search Users, Roles & Departments
   - Search Accounts, Enrolled Customers & Changes
   - Create, Reverse & Search Payment
   - Create Non-Authenticated Payment
   - Create, Edit, Cancel & Search Recurring Payments
   - Search & Export Transaction
   - Search & View Statement
2. Team Leader
   - View Role
   - Search Accounts, Enrolled Customers & Changes
   - Create, Reverse & Search Payment
   - Create, Edit, Cancel & Search Recurring Payments
   - Search & Export Transaction
   - Search & View Statement
3. Customer Service Rep / Take Payments
   - Search Accounts
   - Create,& Search Payment
   - Create, Edit, Cancel & Search Recurring Payments
   - Search & View Statement

(Steps are continued on the next page)

Administrative Menu Options & Features

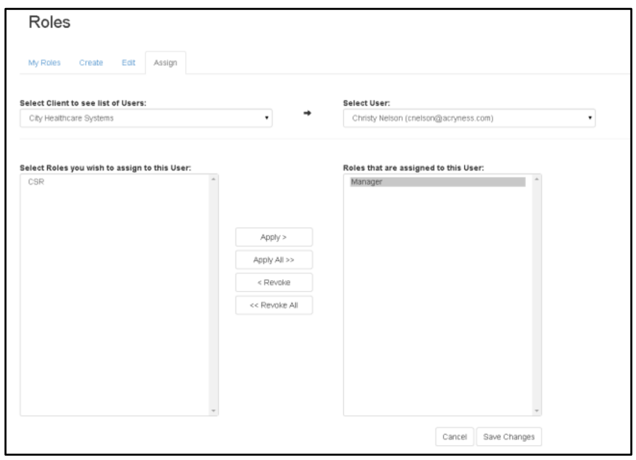
C. Assign Roles

i. Select the Assign Tab
ii. Select the client name
iii. Select the User that needs the role assigned to them

If the user you are looking for is not listed, check the Client Association settings for that user (See **I. User, section B** above)

iv. Click on the Role you wish to assign to the User from the menu box on the left
v. Click Apply > and verify the Role moved to the menu box on the right
vi. Select Save Changes

To remove a role, select the role in the right menu box and use the < Revoke icon.



D. Edit Roles

i. Go to Administrative menu and select Roles
ii. Select the Edit Tab
iii. Select the client name (the only option in dropdown box should be your organization)
iv. Select the Role to Edit from the dropdown box
v. Update any changes needed

To add new permissions, select them in the left menu box and use the Apply > icon. To remove permissions, select them in the right menu box and use the < Revoke icon.

vi. Select Save Changes

III. Departments

Only the users who have the assigned permissions to create, edit or delete roles will use this feature and follow these steps through the D by selecting Departments from the drop down.

A. Add, Edit & View Departments
   i. Select to add new department
   ii. Fill in ALL fields and Save
      1. Select Client name in the drop down box
      2. Provide the department name to appear in all search results
      3. Write a brief description of the department responsibilities
   iii. The department should now be listed on the departments home screen
   iv. Select to make any updates or edit to the department information

IV. Clients

THIS MENU FEATURE IS NOT CURRENTLY AVAILABLE TO CLIENTS. ALL FUNCTIONALITY, AT THIS TIME, WILL BE INITIATED BY ACRYNESS ADMINISTRATORS ONLY.

V. Statement Import

THIS MENU FEATURE IS NOT CURRENTLY AVAILABLE TO CLIENTS. ALL FUNCTIONALITY, AT THIS TIME, WILL BE INITIATED BY ACRYNESS ADMINISTRATORS ONLY.

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Customer Accounts

I. Search Accounts
   A. Create Search
   B. Account Actions
      - Icon Functions
      - Pay Multiple Accounts
   C. Make A Payment
   D. Create a Recurring Payment

II. Customer Enrolled Accounts
   A. Create Search
   B. View Details

III. Customer Enrolled Changes
   A. View all change history for OBO patient portal registered users

Customer Accounts

I. Search Account

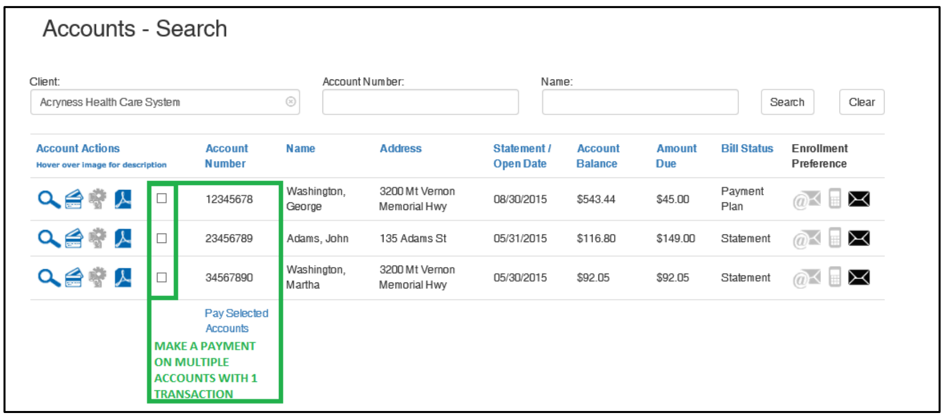
A. Create Search

i. Go to Customer Accounts menu and select Search Accounts

1. Select the client name (the only option in dropdown box should be your organization)
2. The Account Number and Name fields are filters for more exact results. Account number if available is the recommended field to use
3. These fields are not required to have completed information. Partial entry will provide a wider range of results

ii. Select Search

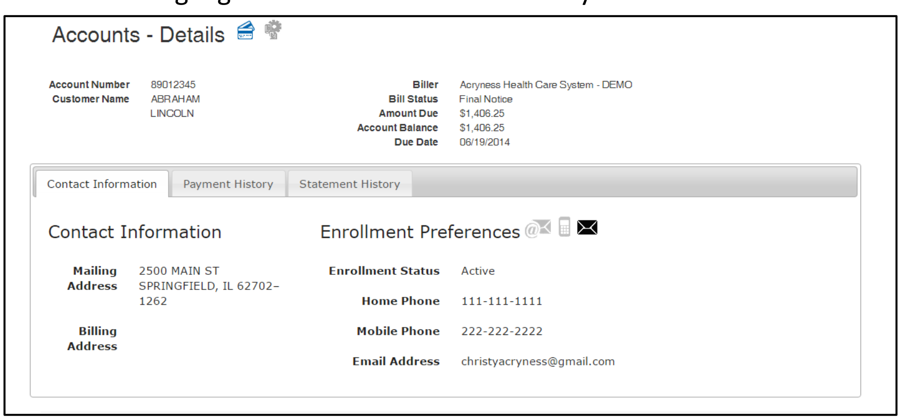
iii. List should be populated below with results from the search



B. Account Actions

i. View Account Details

1. Highlight the tab to view data history related to the account



(Steps are continued on the next page)

2. Basic Information: Validate the general patient account information here including Mailing & Billing address, Account Balance and Amount Due.
   - No information can be edited in this tab
3. Payment History: History of the payments posted for this account.
   - You can reverse charges in this tab by selecting Reverse
4. Statement History: History of statements related to this account
   - You can view any statement in this tab by selecting

ii. Make a Payment

1. Highlight and select to be redirected to the Make A Payment page
   - Please refer to the Make A Payment section for further instruction

iii. Initiate Enrollment

1. Engage the Patient
2. Setup eBill and edit enrolled account details
3. Drive Down Costs

eInitiate

For more information about this product contact Acryness Support

iv. View Latest Statement

1. Highlight and select to view the most recent statement produced for this account

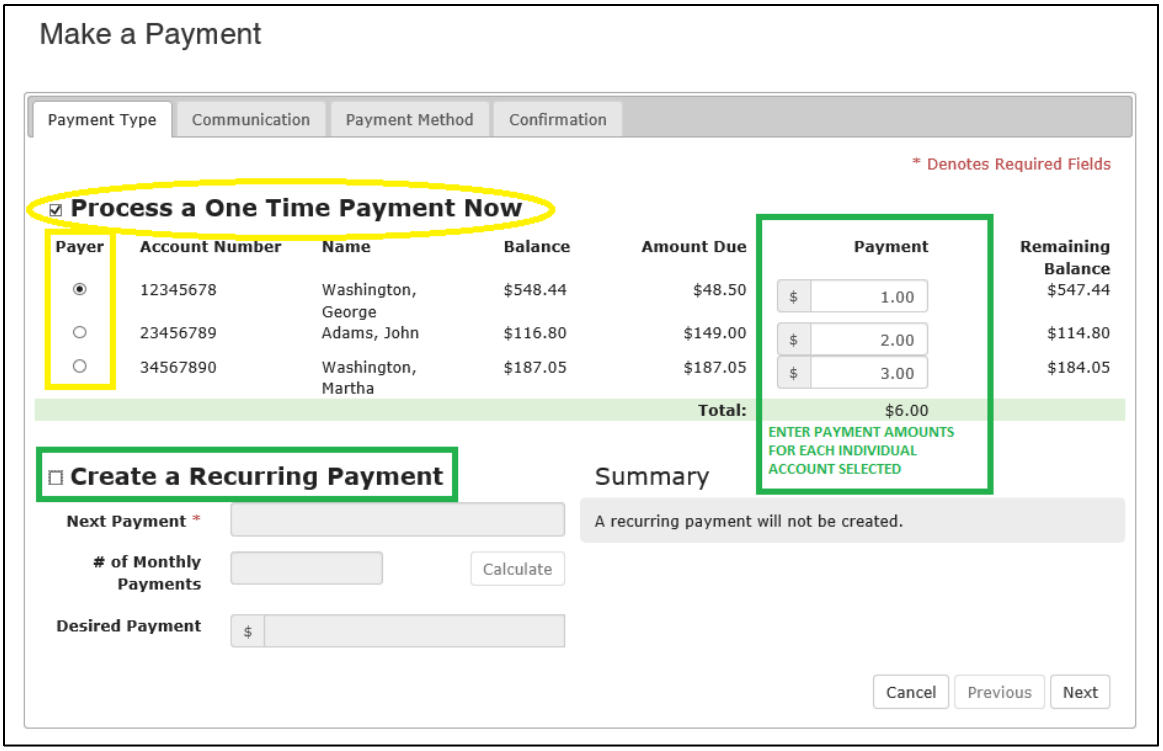
v. Pay Selected Accounts

1. Mark the check box for the multiple accounts that you wish to complete with 1 transaction and click Pay Selected Accounts at the bottom of the list of results
2. You will be redirected to the Make A Payment screen
   - Automatically selected for you is Process a Payment Now
   - Users have the option to setup recurring payments if selected. Refer to instructions for this feature in the next section
3. Select the payer account that is responsible for the payment
   - Selection should match the card holder and billing information

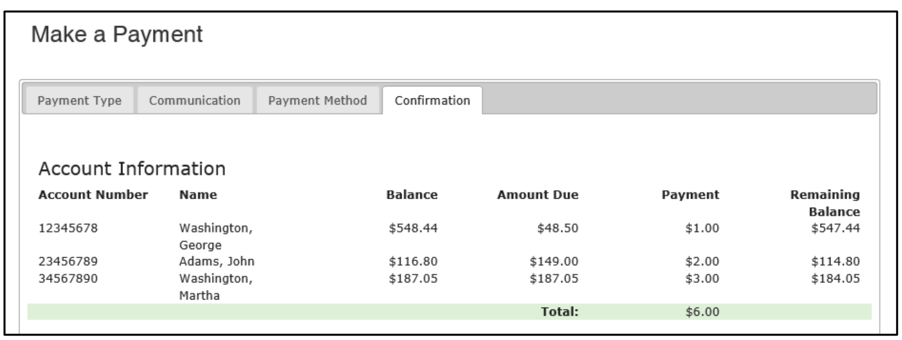
(Steps are continued on the next page)

Customer Accounts

4. Continue by following all steps to complete Make A Payment



5. The top of the confirmation page should reflect all accounts being paid with that transaction



(Steps are continued on the next page)

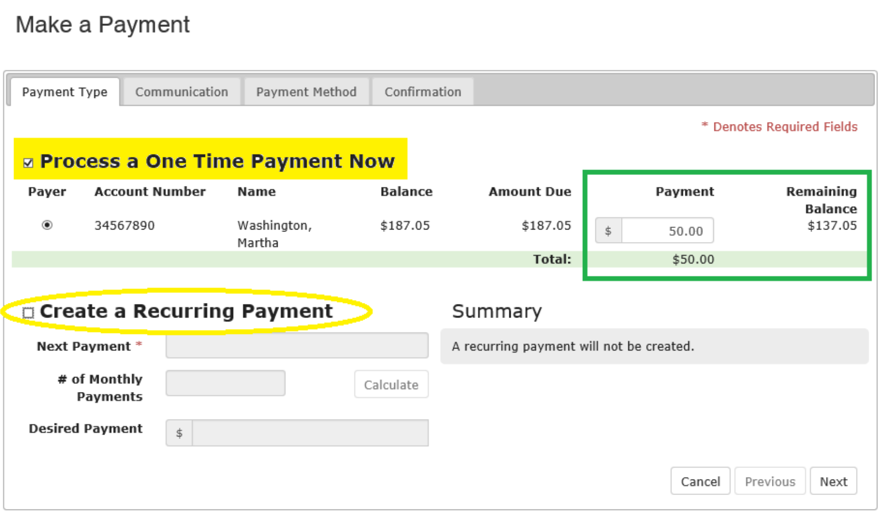
Customer Accounts

C. Make a Payment

i. In any menu with this icon, highlight and select the icon to be redirected to the Make A Payment page

1. Automatically selected for you is Process a Payment Now

   - If selected, you can setup recurring payments (instructions are in the next section)



2. Payment Type

   a. Validate all account information is correct

   b. Payer button is automatically selected unless paying multiple accounts. **Make sure to select the Payer account that is responsible for making the payment(s)**

   c. Enter the amount of the payment(s)

      - validate that the remaining balance is reduced by this amount
      - validate the total amount of the payment meets expectation

(Steps are continued on the next page)

Customer Accounts

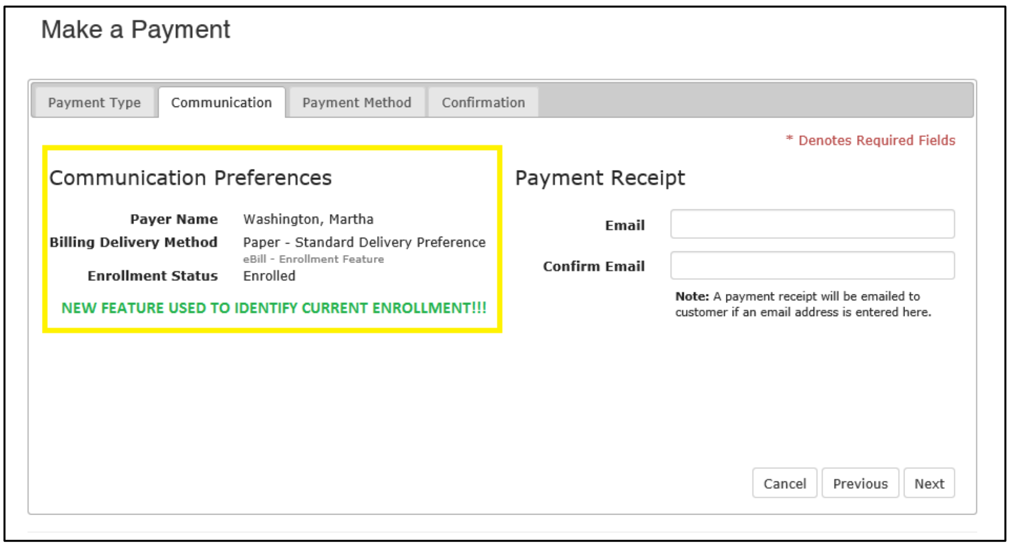
3. Communication
    a. Communication Preferences

    - Payer Name is automatically populated based on the Payer account selected in the previous screen

    - Billing Delivery Method: Options available for statement delivery: highlighted with the current selection based on the Payer account selected in the previous screen

    - Enrollment Status: shows if the Payer account is currently enrolled

    b. Payment Receipt – used to identify an email address for e-receipt



4. Payment Method

    Options for payment method are based on your currently contracted services

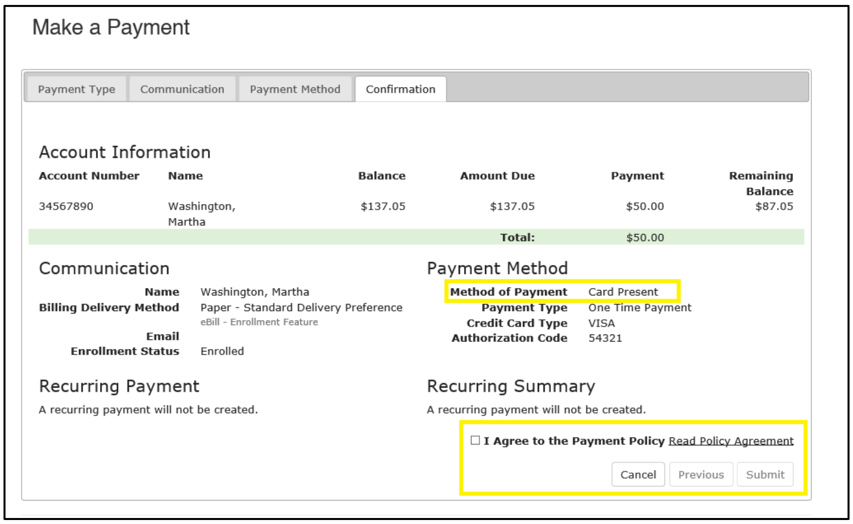
    a. Options for method of Payment:
        - Credit Card – entering card information through the application
        - Card Present or Echeck – **these payment methods are available upon request with setup of Acryness Merchant Services**
        - Cash or Check – these payment methods require further action by the client user, but will update the account details

(Steps are continued on the next page)

Customer Accounts

   b. Fill in all required fields and select Next

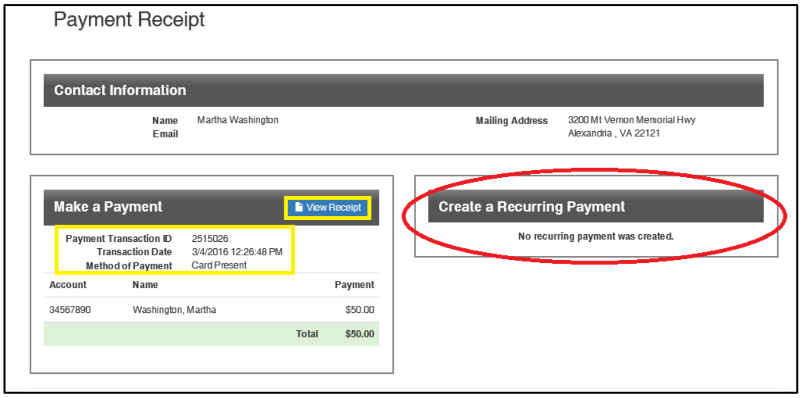
5. Confirmation
   a. Validate all information entered on previous screens is correct
   b. Select Agree to the Payment Policy
   c. Select Submit Payment



(Steps are continued on the next page)

Customer Accounts

6. You are redirected to a page that provides payment information and gives you the option to print the receipt for your records
   - If selected, you would also see the recurring payment summary here (instructions are in the next section)



D. Create a Recurring Payment

i. In any menu with this icon , highlight and select the icon to be redirected to the Make A Payment page

1. Automatically selected for you is Process a Payment Now
   - If you do not wish to make a payment now and only want to create a recurring payment setup, remove the check mark in the box and select the check box next to Create a Recurring Payment only.
   - If you wish to make a payment now and create a recurring payment at the same time, you should leave this box checked and fill in the payment information as instructed in the previous section. Then select the check box next to Create a Recurring Payment.

(Steps are continued on the next page)

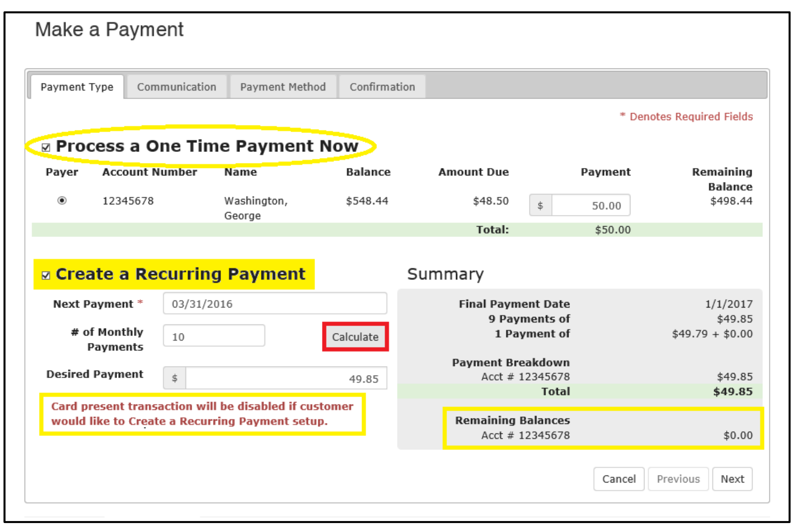
2. Payment Information

If you choose to setup a recurring payment, you will not be able to use Card Present as a method of payment

The data entered here is interactive. Required information is marked with an asterisk (*). You must select the Calc button when any changes are made in order for the summary to update.

Pay attention to the remaining balances in the summary section to ensure your results are as expected

   a. First Payment – date requested by the customer for when the first payment for the recurring setup will process
      - **This date will be the same on each recurring month and is used for the calculation of the final payment date**
   b. # of Monthly Payments – how many payments does the customer want to make
      - **You may leave this field blank and enter the Desired Payment requested by the customer and allow this to calculate for you**
   c. Desired Payment – payment amount requested by the customer
      - **You may leave this field blank and enter the # of Monthly Payments requested by the customer and allow this to calculate for you**
   d. Summary – breakdown of the terms of the recurring payment setup



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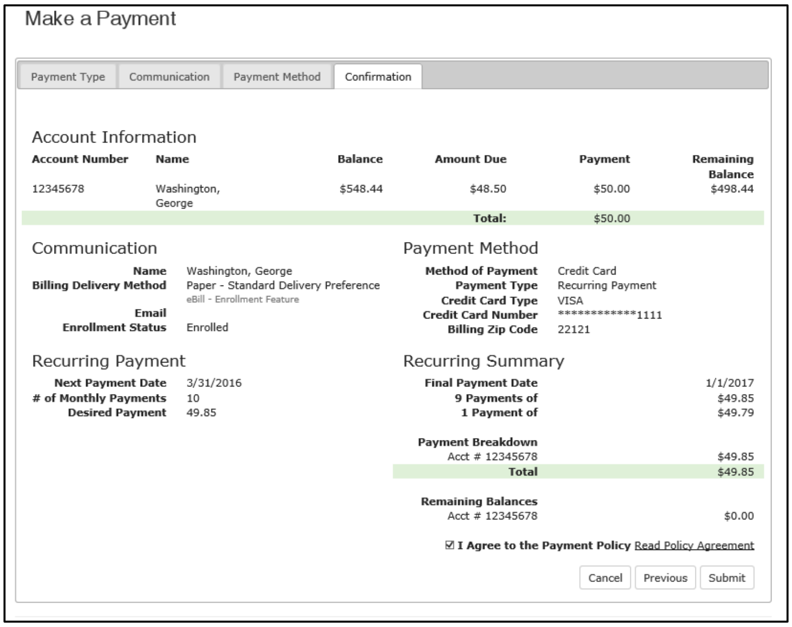
Customer Accounts

3. Complete the process as instructed for Make A Payment above


Make a Payment

Payment Type | Communication | Payment Method | Confirmation

Account Information

Account Number	Name	Balance	Amount Due	Payment	Remaining Balance
12345678	Washington, George	$548.44	$48.50	$50.00	$498.44
			Total:	$50.00	

Communication

Name: Washington, George
Billing Delivery Method: Paper - Standard Delivery Preference (eBill - Enrollment Feature)
Email:
Enrollment Status: Enrolled

Payment Method

Method of Payment: Credit Card
Payment Type: Recurring Payment
Credit Card Type: VISA
Credit Card Number: ************1111
Billing Zip Code: 22121

Recurring Payment

Next Payment Date: 3/31/2016
# of Monthly Payments: 10
Desired Payment: 49.85

Recurring Summary

Final Payment Date: 1/1/2017
9 Payments of: $49.85
1 Payment of: $49.79

Payment Breakdown
Acct # 12345678: $49.85
Total: $49.85

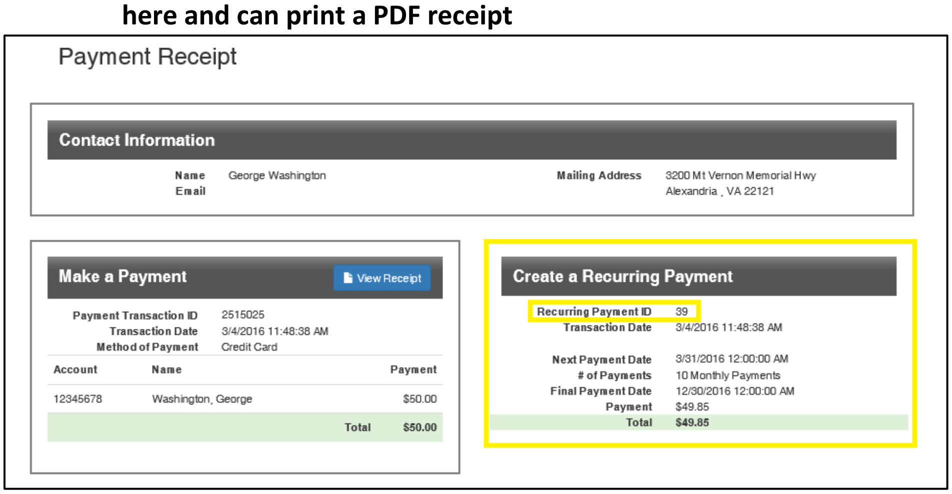
Remaining Balances
Acct # 12345678: $0.00

☑ I Agree to the Payment Policy Read Policy Agreement

Cancel | Previous | Submit

   a. Select Agree to the Payment Policy
   b. Select Submit Payment

4. Payment Receipt
   a. You can view a short summary of the recurring payment setup here
   - If you selected to process a payment now, you will see the results here and can print a PDF receipt


Payment Receipt

Contact Information

Name: George Washington
Email:
Mailing Address: 3200 Mt Vernon Memorial Hwy, Alexandria , VA 22121

Make a Payment — View Receipt

Payment Transaction ID: 2515025
Transaction Date: 3/4/2016 11:48:38 AM
Method of Payment: Credit Card

Account	Name	Payment
12345678	Washington, George	$50.00
	Total	$50.00

Create a Recurring Payment

Recurring Payment ID: 39
Transaction Date: 3/4/2016 11:48:38 AM
Next Payment Date: 3/31/2016 12:00:00 AM
# of Payments: 10 Monthly Payments
Final Payment Date: 12/30/2016 12:00:00 AM
Payment: $49.85
Total: $49.85

Customer Accounts

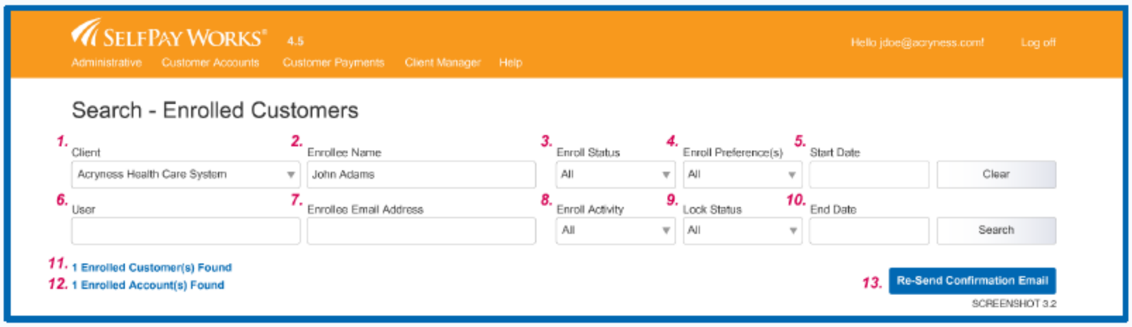
II. Enrolled Customers

A. Create Search

i. Go to Customer Accounts and select Enrolled Customers

ii. Fill in any applicable filters to obtain search results

New fields added to increase types of searches and to refine search results.



1. **Client** – Select the applicable client name from the drop down
2. **Enrollee Name** – First or Last name of the enrolled account holder as entered at the time of enrollment
3. **Enroll Status** – sort by enrollment status *All, Inactive, Active or Pending* enrollment
4. **Enroll Preference(s)** – sort by *All, Paper or eBill*
5. **Start Date** – filter activity search results by beginning date
6. **User** – First or Last name of the person that created the enrollment
7. **Enrollee Email Address** – email address as entered at the time of enrollment
8. **Enroll Activity** – sort by All, eInitiate (client portal enrollment) or Enrollment (customer portal enrollment)
9. **Lock Status** – is the enrolled account locked out? Note: 5 or more failed login attempts will lock Customer Portal access for this enrollee for 4 hours
10. **End Date** – filter activity search results by end date
11. **Enrolled Customer(s) Found** – enrollment counter to display total number of search results
12. **Enrolled Account(s) Found** – enrollment counter to display total number of unique accounts represented in search results
13. **Re-Send Confirmation Email** – Select (check box) one or all search results and re-send the most recent confirmation email sent to the enrollee email address associated with enrollment

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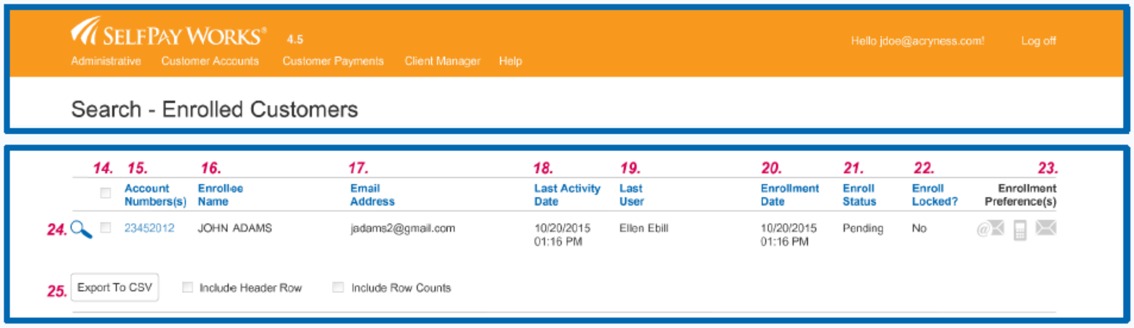
Customer Accounts

iii. Select Search

New columns added to display enrollment activity and status.



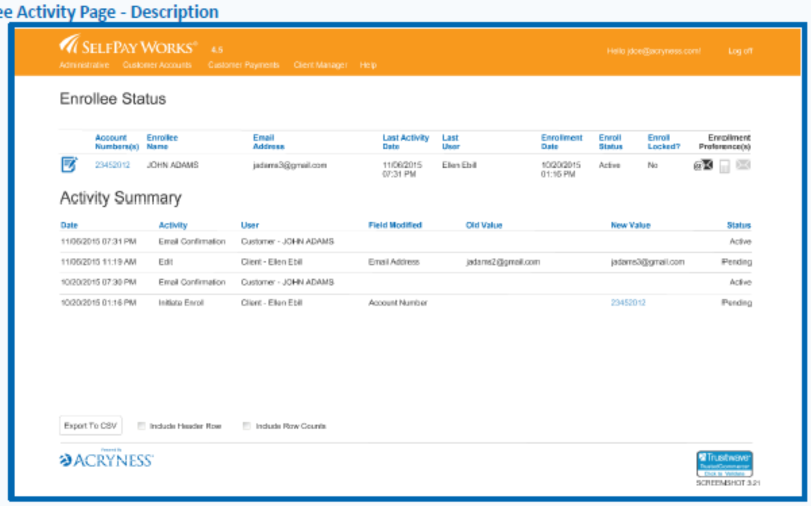
14. **Select All – Check Box** – when checked, auto selects all search results for resending confirmation email to multiple enrolled accounts
15. **Account Number(s)** – lists all accounts, oldest first, associated with this enrollee; click the account number to view **Account Details** for that account.
16. **Enrollee Name** - First and Last name of the enrolled account holder entered at the time of enrollment
17. **Email Address** – email address associated with this enrolled account
18. **Last Activity Date** - record of the last activity date and time enrollment activities were saved by users
19. **Last User** – name of last user submitting the last activity
20. **Enrollment Date** – Date and time enrollment was initiated (saved) in the client portal or customer portal
21. **Enroll Status** – *Pending, Active,* or *Inactive* based on the current status of the enrolled account
22. **Enroll Locked?**- Is this enrolled account locked? Yes or No; Note: users must contact Support in order to unlock the account
23. **Enrollment Preferences(s)** – communication delivery icons eBill, cell phone (*text, IVR*), envelope (*paper*);icons display dark gray for active and light gray for inactive based on the enrolled account preferences at the time of search
24. **Spyglass Icon** – links to activity page for that enrollee
25. **Export to CSV** – when clicked, user may create and save search results

4

B. View Enrollment Activity

i. Select Spyglass next to the account you wish to view

Enrollee Activity Page - Description



Enrollee Status:
The enrollee's line item on the Search page is also displayed on the Activity page for quick reference.

Activity Summary columns are:

1. **Date and Time** – moment task was saved/submitted
2. **Activity** - defines the activity that is taking place
3. **User** – person preforming the activity
4. **Field Modified** – defines the fields of the enrollment account being updated
5. **Old Value** – last record before activity
6. **New Value** – record of new activity
7. **Status** – lists enrollment and edit confirmation status
8. **Export to CSV** – when clicked, user may create and save enrollee activity 13

Customer Payments

I. Non-Authenticated Payment
    A. Create Payment – detailed required information
II. Search Payments
    A. Create Search
III. Transaction Reconciliation
    A. Create Search
    B. New Features Available
    C. Export Search Results
IV. Account Posting
    B. Create Search
    C. Export Search Results
V. Recurring Payment Summary
    D. Create Search
    E. Export Search Results

Customer Payments

I. Non-Authenticated Payment

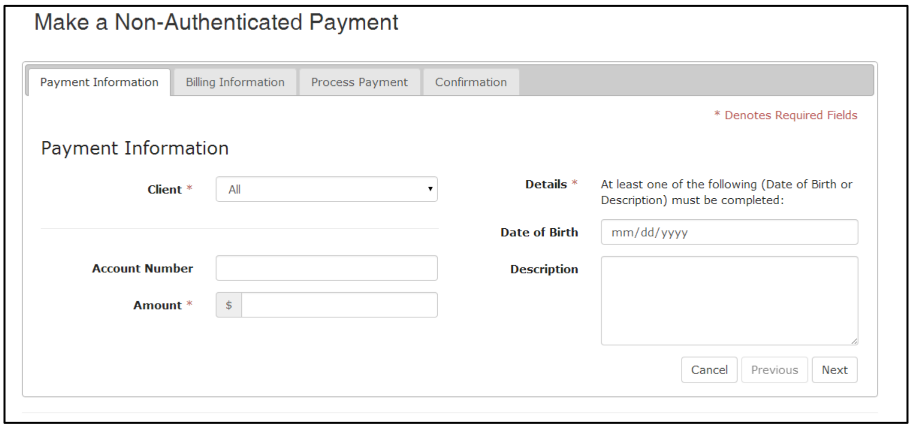
Only the users who have been assigned the permissions to search payments will utilize this feature and follow these steps.

A. Create a Non-Authenticated Payment

i. Go to Customer Payments menu and select Search Payments

ii. Fill in the fields as needed and information is available

iii. Payment Information



1. Fill in the required information shown with an asterisk (*)
2. Client name in the dropdown box should be your organization
3. The account number is not a required field, but if you have one available this is the best identifying information for the account posting record
4. Details: You must provide at least one of the two options: DOB or Description

The account description field is used to list the account number(s) if this is an insurance payment in order for account posting to be accurate. If you do not know the account number(s), use this field to describe the department or the service provided that the payment is being posted for with reference to the customer's name.

iv. Billing Information

1. Fill in the required information shown with an asterisk (*)
2. Enter the name according to the information this is on the credit card being used for payment
   - If you are posting a guarantor, insurance company, or any type of bulk payment, use the insurance company name and split it between first and last name fields

(Steps are continued on the next page)

Customer Payments

3. Enter Patient Phone number and capture patient email address
4. Confirm and enter the Billing Address if different from Mailing

   Mailing Address & Billing Address can be populated with the same information by selecting ☐ Use Mailing? feature

v. Process Payment
   1. Fill in the required information shown with an asterisk (*)
   2. All Credit Card information is required

vi. Confirmation
   1. Validate all information entered on previous screens is correct
   2. Select Agree to the Payment Policy
   3. Select Submit Payment

vii. Payment Receipt
   a. You can select view receipt and view the receipt in a printer friendly version (PDF)

II. Search Payments

Only the users who have been assigned the permissions to search payments will utilize this feature and follow these steps.

A. Create Search

i. Go to Customer Payments menu and select Search Payments

ii. Fill in the fields as needed and information is available
   1. Select the client name (the only option in dropdown box should be your organization)
   2. The Account Name and Number fields are filters for more exact results. Account number if available is the recommended field to use. These fields are not required to have completed information. Partial entry will provide a wider range of results.
   3. Payment Transaction ID: If available, this is the recommended field to use

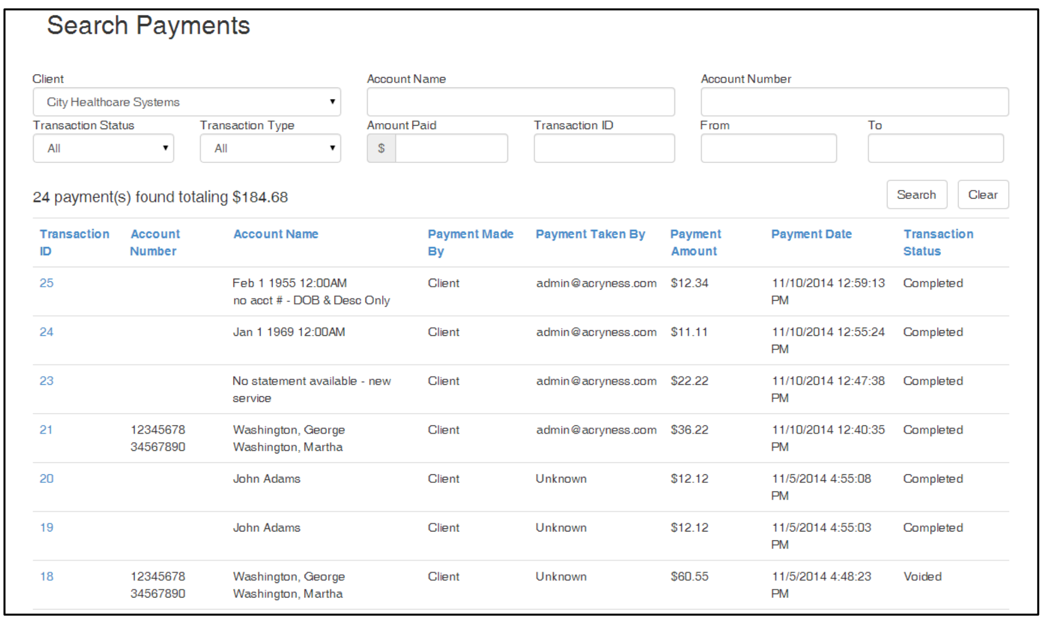
(Steps are continued on the next page)

Customer Payments

4. Transaction Status – this field is used as a filtering tool for results:
   a. Pending are payments not cleared to the account
   b. Completed are payments that are done or can be reversed and show a separate credit transaction with type Reverse
   c. Denied are payments that were declined during transaction
   d. Voided are payments that were reversed prior to the payment being completed
   e. Errored are payments that did not complete during the transaction due to an error in data input or transmission through processing
5. Amount Paid – this field is used as a filtering tool for results
6. From & To Dates – this field is used as a filtering tool for results

iii. Select Search

iv. List should be populated below with results from the search criteria



Search Payments

Client: City Healthcare Systems | Account Name | Account Number
Transaction Status: All | Transaction Type: All | Amount Paid: $ | Transaction ID | From | To

24 payment(s) found totaling $184.68 | Search | Clear

Transaction ID	Account Number	Account Name	Payment Made By	Payment Taken By	Payment Amount	Payment Date	Transaction Status
25		Feb 1 1955 12:00AM no acct # - DOB & Desc Only	Client	admin@acryness.com	$12.34	11/10/2014 12:59:13 PM	Completed
24		Jan 1 1969 12:00AM	Client	admin@acryness.com	$11.11	11/10/2014 12:55:24 PM	Completed
23		No statement available - new service	Client	admin@acryness.com	$22.22	11/10/2014 12:47:38 PM	Completed
21	12345678 34567890	Washington, George Washington, Martha	Client	admin@acryness.com	$36.22	11/10/2014 12:40:35 PM	Completed
20		John Adams	Client	Unknown	$12.12	11/5/2014 4:55:08 PM	Completed
19		John Adams	Client	Unknown	$12.12	11/5/2014 4:55:03 PM	Completed
18	12345678 34567890	Washington, George Washington, Martha	Client	Unknown	$60.55	11/5/2014 4:48:23 PM	Voided

- You can select the transaction ID in this menu to be redirected to the transaction details to review the information provided
- There may be additional information provided with the transaction ID # details
- You can Reverse the transaction in the details screen by selecting

  Reverse this transaction

Customer Payments

III. Transaction Reconciliation

Only the users who have been assigned the permissions to search transactions will utilize this feature and follow these steps.

A. Create Search

i. Go to the Customer Payments Menu and select Transaction Reconciliation

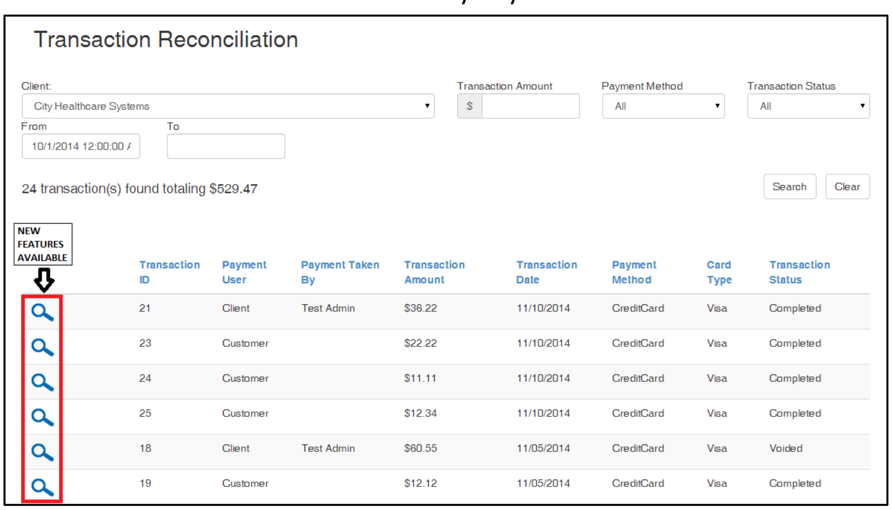
ii. Fill in the fields as needed and information is available

1. Select the client name (the only option in dropdown box should be your organization)
2. Transaction Amount – this field is used as a filtering tool for results
3. Payment Method – The "All" selection is the best practice for this filter
4. Transaction Status – this field is used as a filtering tool for results:
   a. Pending are payments not cleared to the account
   b. Completed are payments that are done or can be reversed and show a separate credit transaction with type Reverse
   c. Denied are payments that were declined during transaction
   d. Voided are payments that were reversed prior to the payment being completed
   e. Errored are payments that did not complete during the transaction due to an error in data input or transmission through processing
5. From & To Dates – this field is used as a filtering tool for results

iii. Select Search

iv. List should be populated below with results from the search

- The list can be sorted by any of the column headers



(Steps are continued on the next page)

Customer Payments

B. New Feature Available

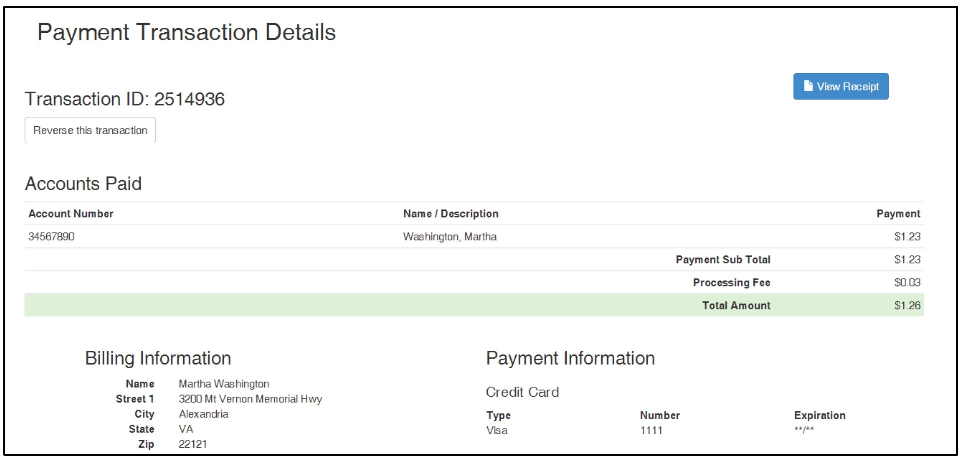
i. Select for Transaction Details

ii. Review information provided

a. There may be additional information provided under the transaction ID #

b. You can Reverse the transaction by selecting Reverse this transaction

c. You can view the receipt in a printer friendly version (PDF)



Payment Transaction Details

View Receipt

Transaction ID: 2514936

Reverse this transaction

Accounts Paid

Account Number	Name / Description		Payment
34567890	Washington, Martha		$1.23
		Payment Sub Total	$1.23
		Processing Fee	$0.03
		Total Amount	$1.26

Billing Information

Name	Martha Washington
Street 1	3200 Mt Vernon Memorial Hwy
City	Alexandria
State	VA
Zip	22121

Payment Information

Credit Card

Type	Number	Expiration
Visa	1111	**/**

C. Export Search Results

i. Select the box for Include Header Row at the bottom of the search results list

ii. Select Export To CSV

iii. Prompt will appear and user should select Open.

iv. Spreadsheet with data from search results will be created

(See next page for definitions of header columns for data)

v. Header Row Definitions
   1. Payment ID – Transaction ID number
   2. User Type – this details if this was a "customer" online payment or if it was a "client" in office initiated payment.
   3. Payment amount – this field is not customized to show as dollars and cents but can be done after export if needed.
   4. Payment Date
   5. First Name, Last Name, Address Lines (5 total), Phone Number, Customer Email – all will reflect as entered at the time of payment for the patient account posting
   6. Payment Type – represents the form of payment used such as credit card, cash or check
   7. Payment Method – represents the credit card type
   8. Client First Name, Client Last Name, Client Email – these fields detail which user input the payment information, if the payment was client initiated (see #2)
   9. Payment Status – provides the status of the payment at the time the report is being generated

IV. Account Posting

A. Create Search

i. Go to the Customer Payments Menu and select Account Posting

ii. Fill in the fields as needed and information is available

iii. Select the client from the drop down (your organization should be the only option available)

iv. Date Range: input according to the intentions of the results output.

If you do not do this, you may receive results for every transaction that has occurred in the last 24 months

v. Limit your search results by using these specific fields

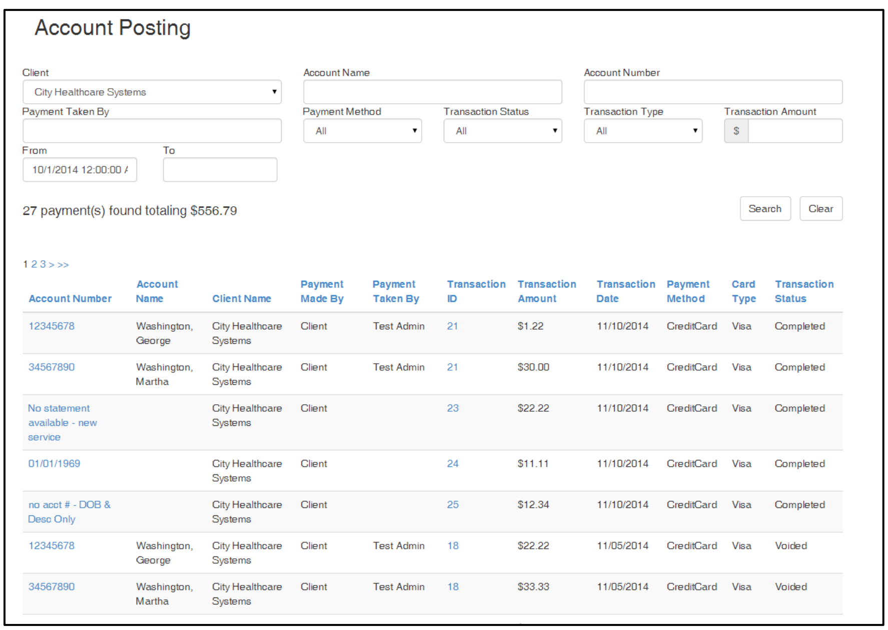
(Steps are continued on the next page)

Customer Payments

1. Transaction Type: select the type of payment you are searching for based on the data input at the time the payment was posted. Default for this field is "All"
   a. Authenticated: this is a payment entered directly through a patient account record for reconciliation
   b. Non-authenticated: this is a payment entered directly through the Non-authenticated feature in that is not directly linked to a patient account record for reconciliation
2. Transaction Status: this field is not required to filter results but can be specified with the drop down menu or left with the category of "All" according to the intentions of the results output
   a. Pending: any payment that has not currently completed the processing for account reconciliation
   b. Completed: any payment that has currently completed the processing for account posting
   c. Reversed: any payment that has been manually reversed and will not reconcile for account posting
   d. Errored: any payment that attempted to complete the processing for account posting but was not successful

vi. Select Search

vii. List should be populated below with results from the search



Account Number	Account Name	Client Name	Payment Made By	Payment Taken By	Transaction ID	Transaction Amount	Transaction Date	Payment Method	Card Type	Transaction Status
12345678	Washington, George	City Healthcare Systems	Client	Test Admin	21	$1.22	11/10/2014	CreditCard	Visa	Completed
34567890	Washington, Martha	City Healthcare Systems	Client	Test Admin	21	$30.00	11/10/2014	CreditCard	Visa	Completed
No statement available - new service		City Healthcare Systems	Client		23	$22.22	11/10/2014	CreditCard	Visa	Completed
01/01/1969		City Healthcare Systems	Client		24	$11.11	11/10/2014	CreditCard	Visa	Completed
no acct # - DOB & Desc Only		City Healthcare Systems	Client		25	$12.34	11/10/2014	CreditCard	Visa	Completed
12345678	Washington, George	City Healthcare Systems	Client	Test Admin	18	$22.22	11/05/2014	CreditCard	Visa	Voided
34567890	Washington, Martha	City Healthcare Systems	Client	Test Admin	18	$33.33	11/05/2014	CreditCard	Visa	Voided

(Steps are continued on the next page)

Customer Payments

- You can select the hyperlink for any account number in the results to view the account details
- You can select the hyperlink for any transaction ID in the results to view the payment transaction details
- If multiple accounts are paid with the same transaction, this is identified here with the same transaction ID number

B. Export Search Results

  i. Select Include Header Rows

  ii. Select Export to CSV

  iii. Data fields are defined as follows:

    1. Client Name – will always reflect your organization's name
    2. Department – represents the department that would have been directly involved with the data input at the time the payment was posted (if applicable)
    3. Account Number – represents the patient account number associated with the statement
    4. First Name, Last Name, Address Lines (5 total), Phone Number, Customer Email – all will reflect as entered at the time of payment
    5. Processing Payment – this details if this was a "customer" online payment or a "client" user payment
    6. Payment Received by and Client Email Address – client user that input the payment information, if the payment was client initiated
    7. Transaction ID – payment record identification number
    8. Transaction Amount
    9. Transaction Date
    10. Payment Method – represents the credit card type such as Visa, MasterCard, etc.
    11. Payment Type – represents the form of payment used such as credit card

(Steps are continued on the next page)

Customer Payments

12. Payment Status – provides the status of the payment if Completed or Errored

	A	B	C	D	E	F	G	H
1	ClientName	Department	Account Number	Blank Field	First Name	Last Name	Address Line 1	Address Line 2
2	Payment Total	5	Line Count	1				
3	City Healthcare System	BST Support	12345678		GEORGE	WASHINGTON	8200 TELEGRAPH RD	

	I	J	K	L	M	N	O
1	City	State	Zip Code	Phone Number	Email Address	Processing Payment	Payment Received by
2							
3	LORTTON	VA	22079-1219	7047993550		Client	Vicki Goetz

	P	Q	R	S	T	U	V	W
1	Client Email Address	Transaction ID	Transaction Amount	Transaction Total	Transaction Date	Payment Method	Payment Type	Payment Status
2								
3	vgoetz@acryness.com	738046	5	5	5/22/2014	Credit	VISA	Completed

V. Recurring Payment Summary

A. Recurring Payment Search

i. Select Recurring Payment Summary from the Customer Payments menu

ii. Select the client from the drop down (your organization should be the only option available)

iii. Use the fields provided to filter your search results

1. Recurring Payment ID – if available, this will provide exact results
2. Account Number & Name
    - If there are multiple accounts being paid with 1 Recurring setup, only enter 1 of the 2 account numbers or names associated. The results will populate information for both.

(Steps are continued on the next page)

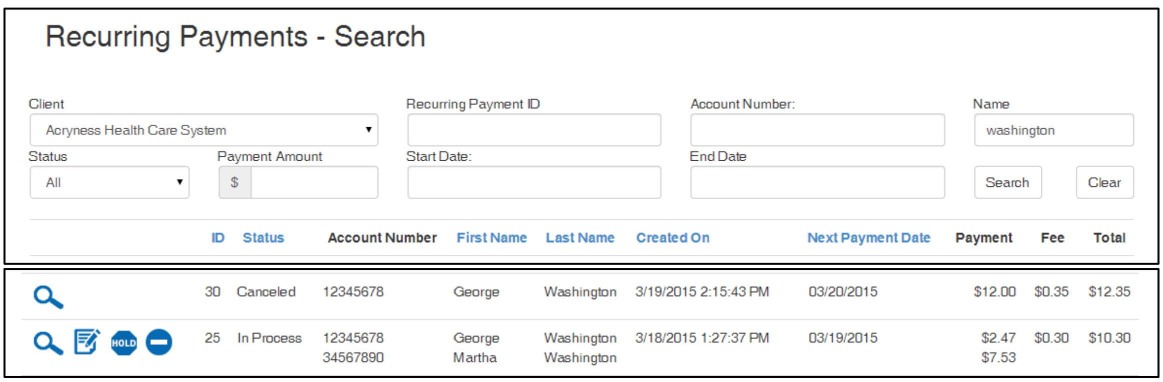
Customer Payments

3. Status
    - In Process – payment plan is not complete and is scheduled for a future date
    - On Hold – setup is placed on hold normally due to an attempt to process and resulted with error or decline transaction
    - Completed – payment plan has finished terms successfully
    - Cancelled – setup was cancelled before terms were successfully completed
4. Date Range: enter the date range of the next expected scheduled payment date

iv. Select Search

v. List of results is presented

- Columns highlighted in blue can be sorted



iv. Select to view the details of the recurring payment setup

v. Select to edit the current payment terms of the recurring payment

- The credit card information is unable to be edited. You must cancel the payment that is currently setup and create a new one

vi. Selecting HOLD will allow you to temporarily suspend the recurring payment

- Status is now "on hold" until it is manually changed
- The icon will automatically change to when HOLD is selected
- To return to status IN PROCESS and release the recurring payment from ON HOLD status, you can select this icon again

vii. Selecting will cancel the recurring payment setup.

- You must confirm the cancellation before proceeding

Client Manager

I. Online Payment Services

THIS MENU FEATURE IS NOT CURRENTLY AVAILABLE TO CLIENTS. ALL FUNCTIONALITY, AT THIS TIME, WILL BE INITIATED BY ACRYNESS ADMINISTRATORS ONLY.

II. Statement Services

THIS MENU FEATURE IS NOT CURRENTLY AVAILABLE TO CLIENTS. ALL FUNCTIONALITY, AT THIS TIME, WILL BE INITIATED BY ACRYNESS ADMINISTRATORS ONLY.

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