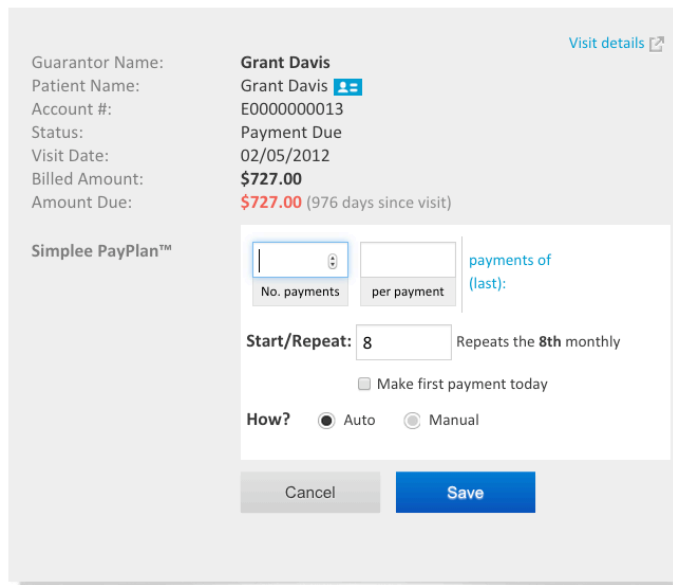


6. Payment Plans

- Simplee PayPlans are already programed to follow your Revenue Cycle Guidelines so you can easily set up a plan.
- Click the link “Set up Simplee PayPlan” to define the terms of the plan.
- You can always edit the terms of the plan or card saved at any point in the future.



The screenshot shows a web interface for setting up a Simplee PayPlan. At the top right, there is a link "Visit details" with an external link icon. The patient information is as follows:

Guarantor Name:	Grant Davis
Patient Name:	Grant Davis
Account #:	E000000013
Status:	Payment Due
Visit Date:	02/05/2012
Billed Amount:	\$727.00
Amount Due:	\$727.00 (976 days since visit)

Below this is the "Simplee PayPlan™" section. It contains a form with the following fields and options:

- "No. payments" and "per payment" input fields, with "payments of (last):" text to the right.
- "Start/Repeat:" field with the value "8" and the text "Repeats the 8th monthly".
- A checkbox labeled "Make first payment today".
- "How?" section with radio buttons for "Auto" (selected) and "Manual".
- "Cancel" and "Save" buttons at the bottom.

- Currently, PayPlans can only be set up for credit/debit cards, not check/ACH transactions.
- If a patient accrues an additional balance after a PayPlan is set up, this balance will remain outside the payment plan.
- After a payment plan is set up, you'll be able to view the terms in the patient's account in Simplee. To edit the terms, click the “Payment” button in the top right corner.
- The patient will receive an email two days before a payment is due. For Auto PayPlans, the email will notify the patient that there card will be charged. For Manual PayPlans, the email will remind them to make a payment in two days.

7. Manual Payments

- The manual payment feature allows you to collect a payment any time a patient account cannot be found or does not exist yet. This feature can be used for pre-service or point-of-service payments.
- After a manual payment is completed, Simplee will match the account number with a new patient account, so it is important that the number is entered accurately.
- Manual payments can be taken for card, check, or cash.
- You can also set up PayPlans for manual payments, in the same way as you would for any other payment.

The screenshot shows a software interface with a top navigation bar containing 'ACH Transfers', 'Accounts', and 'Reports'. Below the navigation bar, there are three radio buttons for search criteria: 'by Account #' (selected), 'by Name', and 'by Social Security #'. A search input field labeled 'Account #' is followed by a 'Find' button. To the right, there is a 'Payments: Cart (0)' button. Below the search area, there is a blue link 'Add manual payment'. The main content area is titled 'Add a manual payment' and contains a form with the following fields: 'Patient Name:' with an empty text box, 'Account #:' with an empty text box, 'Payment Amount:' with an empty text box, and 'Phone Number:' with an empty text box and the word 'Optional' in italics. Below the 'Phone Number' field is a blue link 'Set up a Simplee PayPlan™'. At the bottom of the form are two buttons: 'Add to cart' and 'Proceed to payment'.

8. ACH Transfers

- The ACH Transfer reports allow you to see all payments that have been made and wired to the clinic or hospital on any particular day.
- After a payment is collected, it takes a few days for the payment to settle and the transaction to appear in the ACH report.
- The report is organized by clinic. Within each clinic, you will find a list of every payment or refund (debit) by account number.

Last day

Last 7 days

All

Find a transfer

Last 7 days : Sep 09, 2014 - Sep 16, 2014

\$318,813.41

Total Payments

\$316,979.41

Settled amount

\$1,834.00

Total Debit

\$0.00

Cash payments

Batch Transfers #2891-#3010

Print

Batch #	Date	Total Payments	Total Credit	Total Debit
3010	09/15/2014 00:00AM	\$63,627.17	\$63,627.17	\$0.00
2986	09/12/2014 00:00AM	\$35,800.58	\$37,574.58	-\$1,774.00
2959	09/11/2014 00:00AM	\$67,589.91	\$67,589.91	\$0.00
2927	09/10/2014 00:00AM	\$64,083.46	\$64,083.46	\$0.00
2891	09/09/2014 00:00AM	\$85,878.29	\$85,938.29	-\$60.00

9. Reports

- The reports tab shows a variety of reports that can be customized for your needs, including
 - ✓ Payments Summary
 - ✓ Payments Detailed
 - ✓ Operational
 - ✓ Payment Plans
 - ✓ Payments by User
 - ✓ Paper Statements
 - ✓ Collection Placement Report
 - ✓ NCOA - change of address updates (note this is a premium feature)
- All reports can be exported as a CSV file.

Payment Summary Report

Eligibility
ACH Transfers
Accounts
Reports

Report Name

Start Date

End Date

Department

Sub Department

Filter By
 transaction date settlement date
 Run Report

Payments Summary Report Export to CSV

Department	Sub Department	Credit Card		Cash		Echeck		Debit		Total	
		#	\$	#	\$	#	\$	#	\$	#	\$
Financial counseling		17	\$9,290.40	2	\$872.00	3	\$2,024.00	19	-\$3,015.63	41	\$9,170.77
Online	Online	4	\$871.00	0	\$0.00	3	\$1,548.00	0	\$0.00	7	\$2,419.00
Payment Plan	Payment Plan	5	\$1,132.00	0	\$0.00	1	\$100.00	0	\$0.00	6	\$1,232.00
Total		26	\$11,293.40	2	\$872.00	7	\$3,672.00	19	-\$3,015.63	54	\$12,821.77

Export to CSV

Payment Detail Report

Eligibility
ACH Transfers
Accounts
Reports

Report Name

Start Date

End Date

Department

Sub Department

Payment Method

User

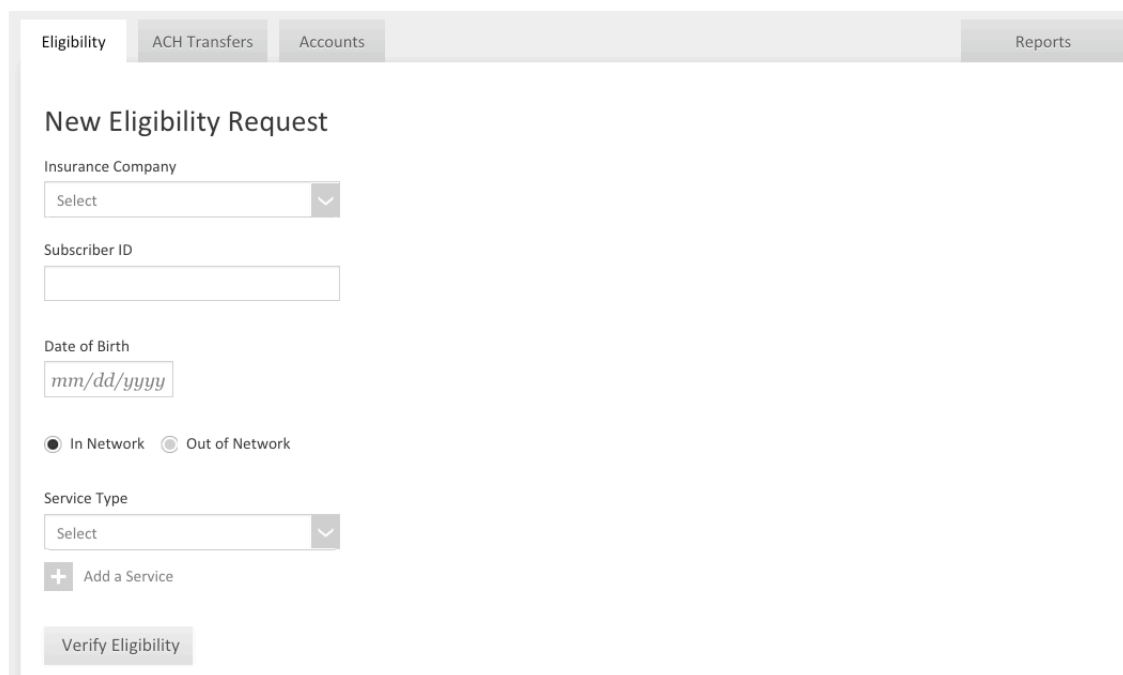
Filter By
 transaction date settlement date
 Run Report

Payments Detailed Report Export to PDF Export to CSV

Sub		Payment Method	Type	Time	Amount	ID	Account #	Guarantor	Username	Billing Name
Department	Department									
Clinic		Credit Mastercard - 0004	Credit	10/07/2014 01:35	\$10.00	9	112117	John Doe	angela@simplee.com	dc asdc
Clinic		Credit Discover - 0004	Credit	10/07/2014 01:35	\$5.26	10	112117	John Doe	angela@simplee.com	dsa sdc

10. Eligibility Requests

- Use the Eligibility tab to run benefits and eligibility checks for any patient.
- The most common payers and services specific to your facility are already programmed in the drop-down menus. If you need additional payers or service types added, please contact support@simplee.com.
- Enter the subscriber ID and patient's date of birth. For Medicare, you will also need to enter the patient's first and last name.
- Choose whether the service is considered in-network or out-of-network.
- Choose one or more service type.
- Click the "Verify Eligibility" button to view results.
- To save the results as a PDF, click the "Save as PDF" button.



The screenshot shows a web interface with a navigation bar at the top containing tabs for 'Eligibility', 'ACH Transfers', 'Accounts', and 'Reports'. The 'Eligibility' tab is active. Below the navigation bar is a form titled 'New Eligibility Request'. The form contains the following fields and options:

- Insurance Company:** A dropdown menu with 'Select' as the current selection.
- Subscriber ID:** A text input field.
- Date of Birth:** A text input field with a placeholder 'mm/dd/yyyy'.
- Network Selection:** Two radio buttons labeled 'In Network' (selected) and 'Out of Network'.
- Service Type:** A dropdown menu with 'Select' as the current selection.
- Add a Service:** A button with a plus sign icon and the text 'Add a Service'.
- Verify Eligibility:** A button at the bottom of the form.

11. Refunds and Voids

Only certain Admins will have refund permissions. However, any SimpleePAY user can void a payment.

Voids

- If a card or check payment is cancelled the same day it was collected (before 10pm Eastern Time) no charge will show on the patient's card. This is known as a void.
- A "Void" link will appear next to a payment record as long as the payment as not settled.

Refunds

- At 10pm Eastern Time, all card and check payments settle. After this point, the patient's card will show a charge. In order to cancel it, you will need to issue a refund.

- Only certain SimpleePAY admins have access to refunds. If a user has this permission they'll see a "Refund" link next to a payment record in the patient's account. Otherwise, this space will be blank.
- Refunds generally take 2-6 days to appear back on a patient's card or in their account, depending on the issuing bank.

Prior payments (2)

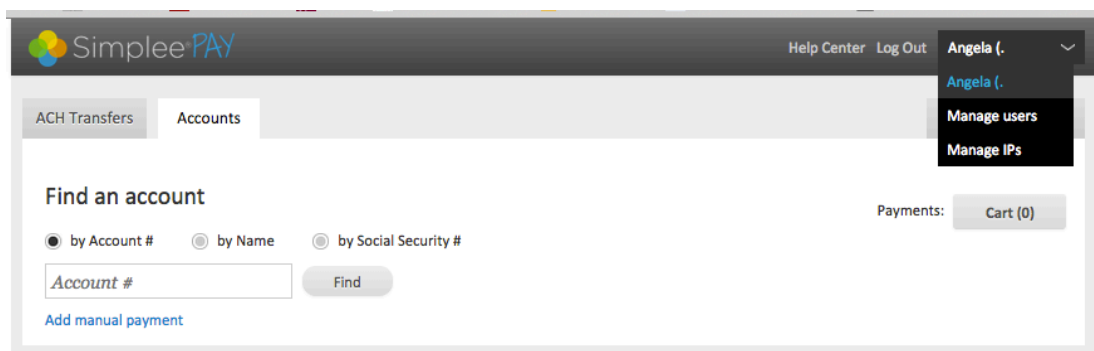
Account #	Visit date	Payment date	Amount paid	Payment method	Status	Transaction id	Batch #	Backoffice user
42250005	08/13/2014	09/12/2014	\$150.00	Credit Visa - 2180	Settled	720478	3034	Refund
42250005	08/13/2014	09/12/2014	\$22.33	Credit Amex - 1004	Settled	720479	3034	Refund

12. For System Administrators

Every facility should have a few Admins to manage SimpleePAY user accounts and other system settings (small clinics may only need one Admin). Admin responsibilities include:

Adding new SimpleePAY users

- Open the Admin view by clicking your name in the top right hand corner. Choose **Manage Users**. Click the button **Add a User**.
- Complete the new user's information. Double check the email address, as the user will receive an email invite here.
- Choose the features the user should have access to. For most users, the basic system access includes **SimpleePAY**, **Accounts**, and **Payment Plans**. You may decide who needs the ability to refund users, access the ACH Transfer, or run reports. You can always edit settings later.
- Save the user. They should receive an email to set up their account immediately.



Removing old SimpleePAY users

- When an employee leaves or changes roles, you must inactivate their account to prevent unauthorized access to patient information.

Editing user permissions

- At any point, you can change a user's permissions for SimpleePAY features.
- Select the user's name, click **Edit User**, and select the new features. Always be sure to remove permissions if a user no longer needs access.

Managing IPs

- As an optional feature, your hospital or clinic can restrict the IPs from which users can access the SimpleePAY site.
- Open the Admin view by clicking your name in the top right hand corner. Choose **Manage IPs**.
- Add or remove IPs on this page. Please be mindful with this action, as you can lock users at other sites out of SimpleePAY unintentionally.

More questions? support@simplee.com or visit the Help Center link inside SimpleePAY