CGM eMDs and CGM PAY Guide

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Product

CGM eMDs

Corporate address

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Chapter 1 - CGM eMDs and CGM PAY

CGM PAY Is a payment processing feature for CGM eMDs with eMEDIX. CGM PAY allows to you process patient payments with credit cards and ACH payments, and then update their balances in CGM eMDs. In addition, you can create payment plans for patients. Payments made in eMEDIX can automatically update patient balances in CGM eMDs; and you can set an option to enable or disable this.

Note: Deleted payments will appear in Italics on the Payment Source and Prepayment windows. In addition, you cannot delete ACH Payments.

CGM PAY Setup

First, you will need to sign up for eMEDIX and receive your credentials. Contact your Client Sales Executive for this. Then, you'll enter those credentials in Bill > File > Administration > eMEDIX Configuration.

In addition, each facility that you want to use CGM PAY will need a Statement Submitter ID. Statement Submitter IDs can be entered from the Bill > Claims > EDI Options. Statement Submitter IDs do not have to be different for each facility.

(Hint: If you are already using statements with eMEDIX, this statement submitter ID will be the same. Most clients will only have one statement submitter ID, but if you need more, please contact your Client Sales Executive).

Figure 1. EDI Options window

Finally, on the eMEDIX Configuration window, select the Enable CGM Pay check box. This will enable the processing of payments with CGM PAY.
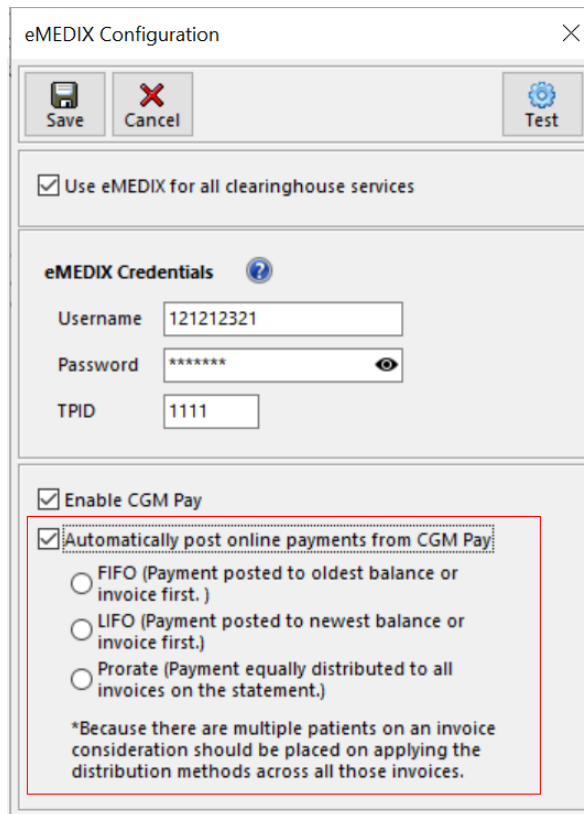

Figure 2. eMEDIX Configuration window

Hint: If you use BillFlash, enabling CGM PAY will stop that service from collecting new payments. You will want to make sure that you only check Enable CGM PAY when you are ready to start collecting payments. BillFlash payments will still continue to be collected and posted from online payments.

There is another option on this window: Automatically post online payments from CGM PAY. When this option is selected, payments made in CGM PAY will automatically be imported into your practice. You can select one of the following posting options:

- FIFO (Payment posted to oldest balance/invoice first)

- LIFO (Payment posted to newest balance/invoice first)

- Prorate (Payment equally distributed to all invoices on the statement)

Figure 3. eMEDIX Configuration window

Entering Payments using CGM PAY

You can use CGM PAY to enter payments via check or credit card for a patient, for instance, their copay, when they arrive for their appointment or payments received at other times. In addition, patients can use the eMEDIX Payment Portal to enter payments to pay their bills.

Patient Prepayment window

When CGM PAY is enabled, the Billflash option no longer appears and a check box for Pay using CGM PAY is available. Select this check box and enter the payment details.
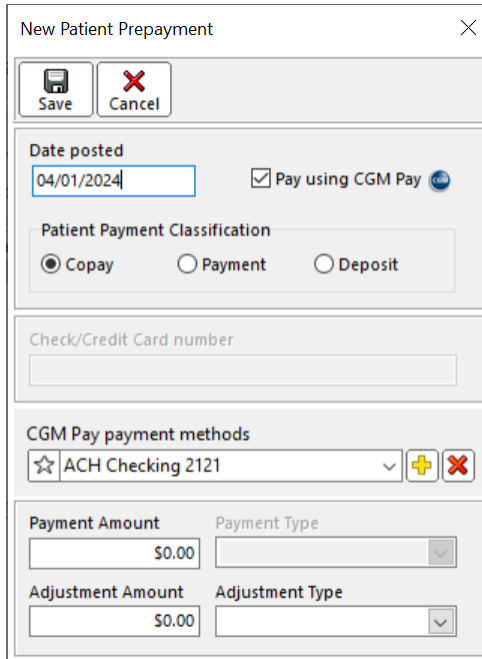

Figure 4. New Patient Prepayment window

The table below describes the elements on this window.

Element	Description
Save button	Click to save the information on the window and launch CGM PAY where you can process the payment.
Cancel button	Click to cancel the payment and close the window without saving any information.
Date Posted	Enter or select a date for the payment. The default value is today's date.
Pay using CGM PAY check box	Select this check box if the payment will be processed through CGM PAY.
Patient Payment Classification	Select the appropriate button.
Check/Credit Card Number	This field will be disabled when you select the Pay using CGM PAY check box.

Element	Description
CGM PAY Payment Methods	Enter or select the payment method if the payment will be processed through CGM PAY. Use the drop-down to select a method if there is more than one method on file.
	This field will be disabled when you clear the Pay using CGM PAY check box.
	☆ symbol: Use the * symbol to select a favorite payment method. ➕ symbol: Click the + symbol to add a new payment method. CGM PAY will open and you can enter the method details and save them in CGM PAY. This will pre-authorize the card. ❌ symbol: Click the X symbol to delete or remove a payment method. You will see a confirmation message before the method is deleted.
Payment Amount	Enter the amount of the payment. If you selected Copay, the appropriate amount will be pulled from the patient's record.
Payment Type	Select a payment type from the drop-down.
	This field will be disabled when Pay using CGM PAY is selected.
Adjustment Amount	Enter an amount in this field if the payment is an adjustment of some type.
Adjustment Type	Select the Adjustment Type from the drop-down.

Bill Charges and Payments window

When CGM PAY is enabled, the ePay at Billflash button no longer appears and the Pay using CGM PAY check box is available. Select this check box if you are entering a payment for CGM PAY.
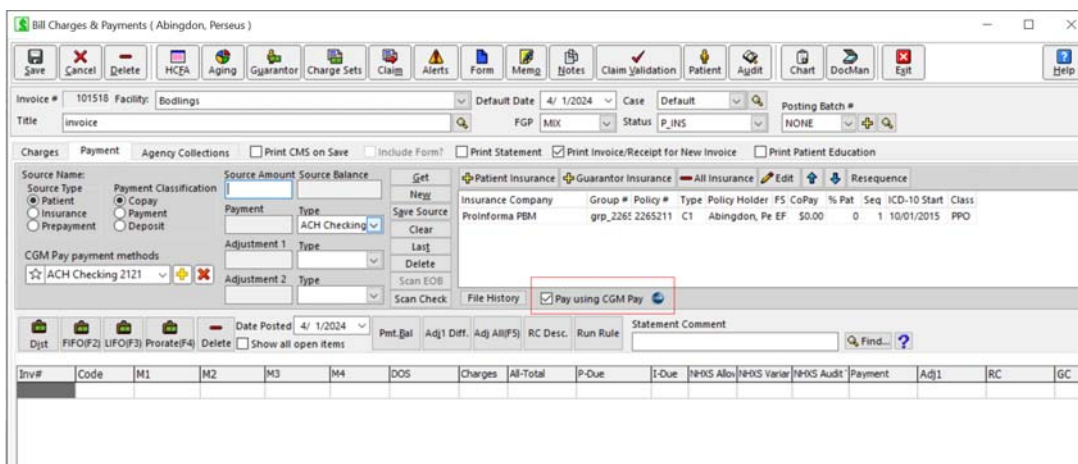

Figure 5. Bill Charges and Payments window

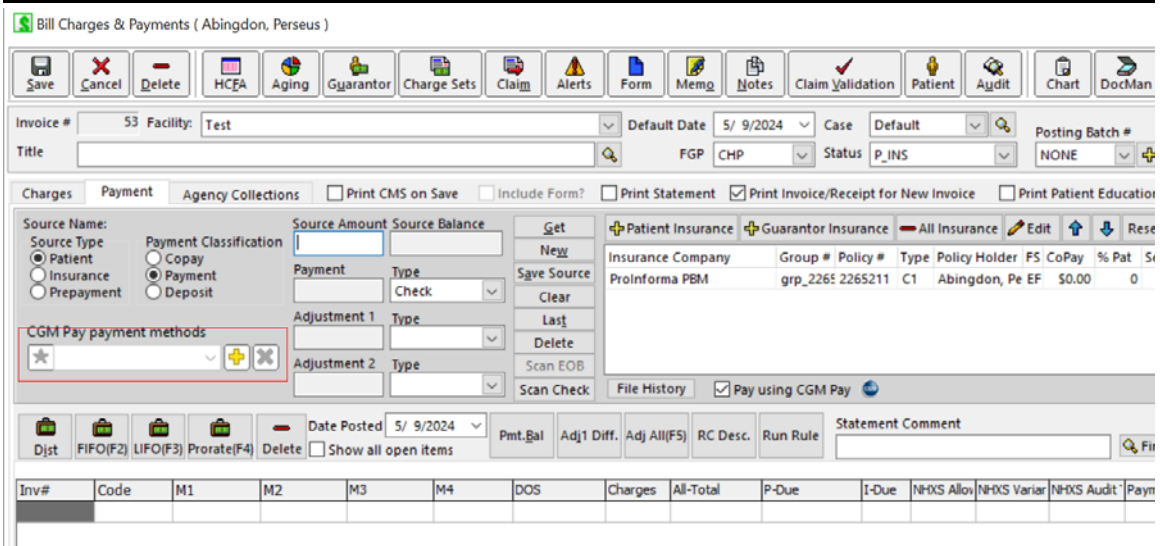This option will be available only when you are using Patient or Prepay.

Figure 6. Bill Charges and Payments window

Payment Source window

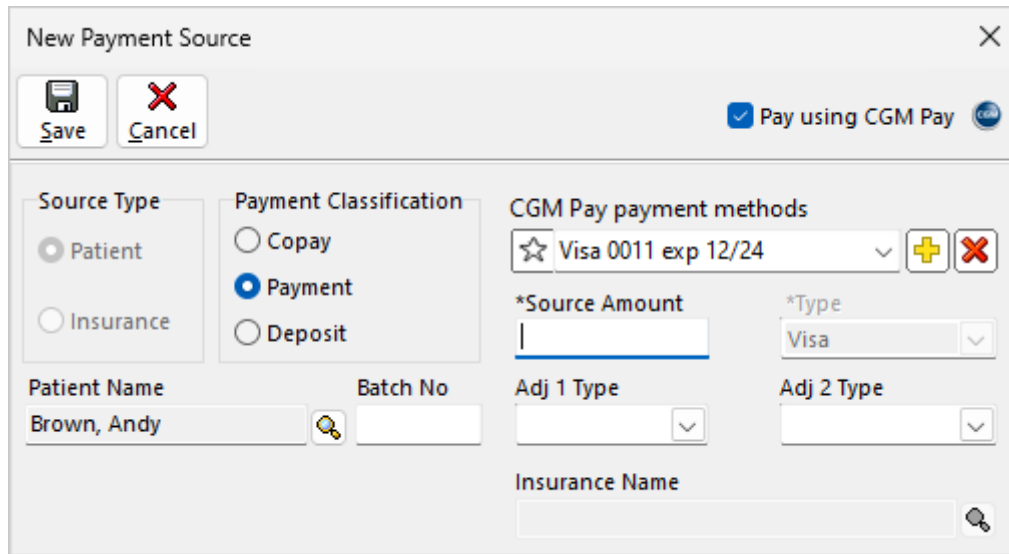CGM PAY payments can also be made from the Payment Source window.

Figure 7. New Payment Source window

CGM PAY Payment Plans

You can also set up payment plans for guarantors/patients using CGM PAY. Each guarantor/patient can have only one plan and you can specify the number of months they will have to pay off their bill and how much

they will pay each month. In addition, you can specify the day of the month that their payment will be charged to their credit card. You will enter these details in the Initiate Payment window as shown below

Figure 8. Initiate Payment window

Payment Plans will be processed automatically through CGM eMDs based on dates and amounts chosen.

Payment Plans can be created by patients or staff. Patients can create payment plans based on administrator settings in eMEDIX and if the clinic is using statements with eMEDIX.

Posting window

In addition, there is a button in the Payments section of the Posting window: Payment Plans. Click this button to open the CGM PAY Payment Plan window.
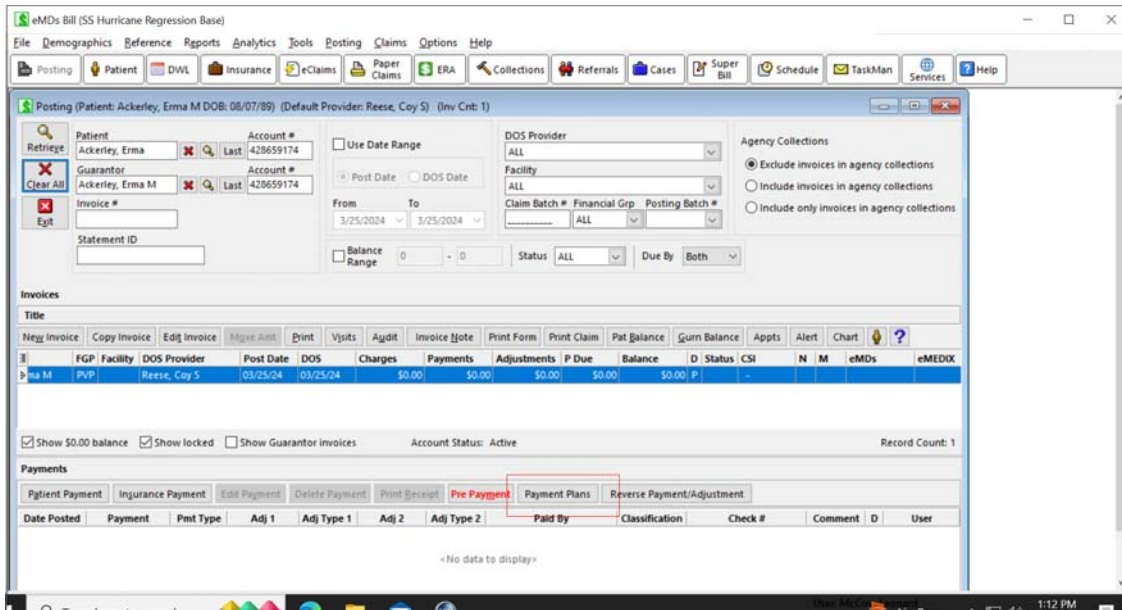

Figure 9. Posting window

Collections window

There is an option on the Collections window: Pmt Plans. Click this option to open the CGM PAY Payment Plans window.

Figure 10. Collections window

CGM PAY Payment Plans window

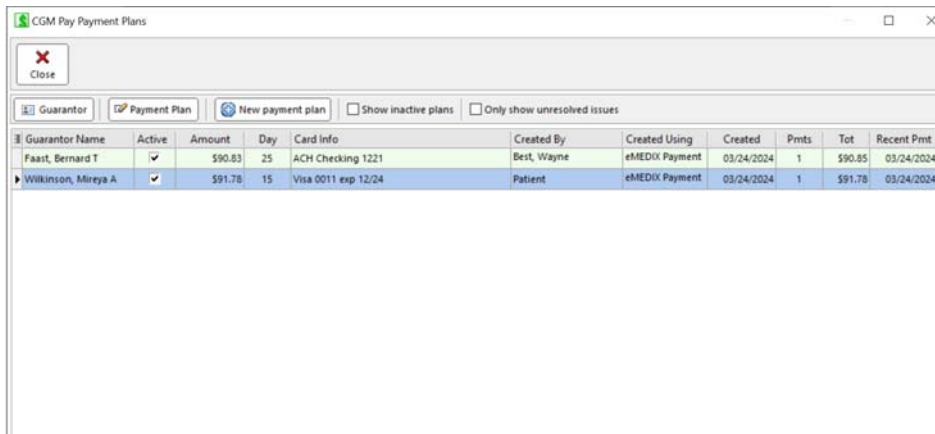Use this window to view existing payment plans and create new plans.

Figure 11. CGM PAY Payment Plans window

Note that the payment plans that appear in this window are NOT patient-specific. ALL plans will appear.

The table below describes the options on this window.

Element	Description
Close button	Click to close the window.
Guarantor	Click this button to open the Guarantor/Policy Holder Maintenance window for the selected line item in the grid.
Payment Plan	Click this button to open the CGM PAY Payment Plan window for the selected item in the grid.
New Payment Plan	Click this button to create a new payment plan. First, the Find Guarantor window will open, allowing you to select a guarantor. Then, CGM PAY will open and you can enter plan details. Note: you must have entered a valid Statement Submitter ID in Claims > EDI Options before you can create a new payment plan.
Show inactive plans	Select this check box to include inactive plans in the grid.
Only show unresolved issues	Select this check box if you want to see only plans with unresolved issues.
Grid	The grid shows you details of the plans. Double-clicking an item in the grid will open the CGM PAY Payment plan window for that payment plan.

CGM PAY Payment Plan window

This window shows you the details of the payment plan, including the history of payments for the plan.

Figure 12. CGM PAY Payment Plan window

Note: a patient can have only one plan.

Guarantor/Patient Balance window

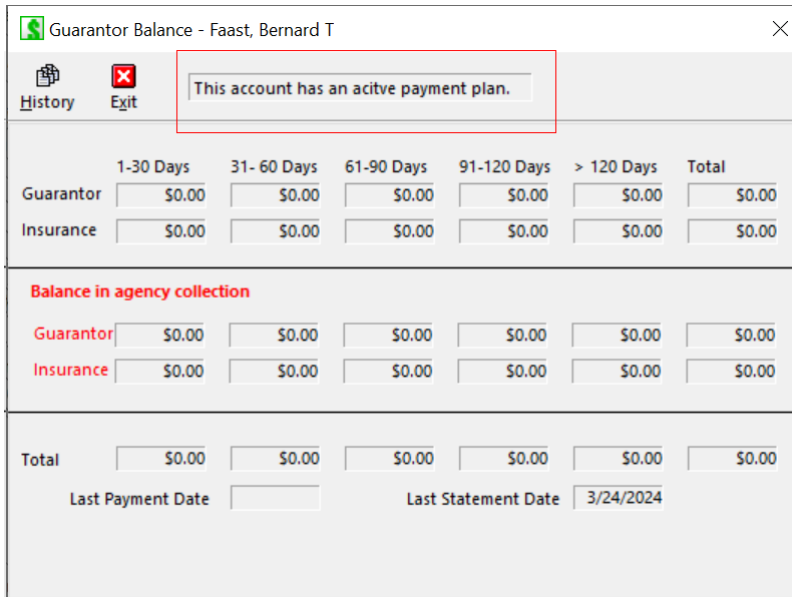If a guarantor has an active payment plan, a notification will appear on the Balance window.

Figure 13. Patient Balance window

Credit Card Authorization

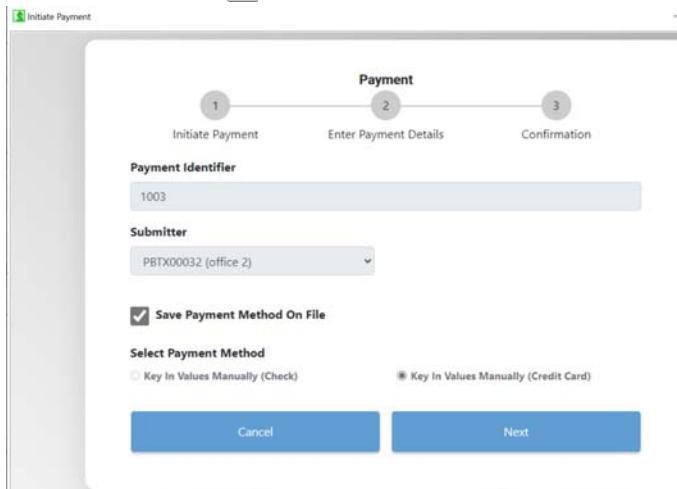When you click the [+] sign, the Initiate Payment window in eMEDIX will open.

Figure 14. Initiate Payment window

Choose to key in the credit card or check manually and click Next.

CGM PAY is PCI-compliant and only a token is stored locally.

- If you select check, the window below will open when you click Next.

Figure 15. Enter Payment Details window

Complete the fields and click Submit.

- If you select credit card the window below will open when you click Next.

Figure 16. Enter Payment Details window

Enter the credit card information and click Submit. The card details will be available in CGM eMDs.

Voiding a payment

You can void or refund the patient's credit card by using the Delete button in the Prepayment window.
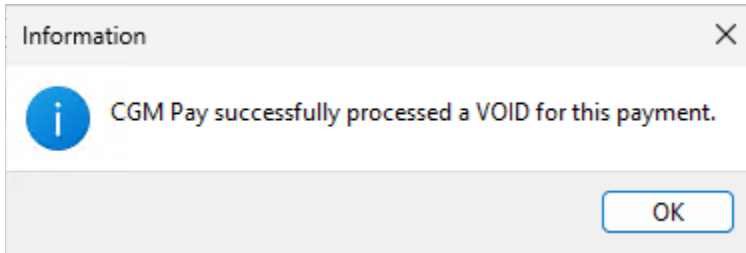

Figure 17. Void Payment popup

The user will get a pop-up indicating if the transaction was processed as a refund or void. Refunds and voids are determined by the merchant and can't be decided by the user.
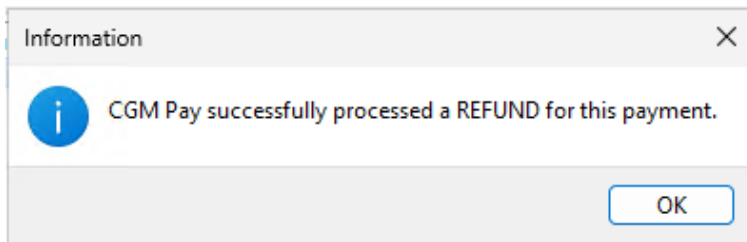

Figure 18. Refund popup