

# Patient Cost Estimator Self Pay Workflow

Last Modified on 02/20/2024 9:26 am EST

## Self Pay Workflow

1. **Payer, Provider and Service Location** are required fields and must be entered to proceed with **Cost Estimator**. Type into the field and select Search or select Search first to view a complete list, then select. For Self Pay estimates, it will be necessary to add **Self Pay** as a payer in the Patient Setup Insurance area.

### Patient Cost Estimator

Dummy2, Test Born: Apr 28, 2005 (17y) Gender: Male

**New Estimation Lines**

**Date of Service\***  **Provider\***

**Payer\***  **Service Location\***

Date of Service	Procedure	Diagnosis	Modifiers	Units	Billed per Unit	Allowed per Unit	Billed Total	Allowed Total	Action
02/23/2023	99213 ESTABLISHED OFFICE VISIT Test	I41 Myocarditis in diseases classified elsewhere	zz	1	\$88.01	\$35.57	\$88.01	\$35.57	<input type="button" value="X"/> <input type="button" value="Edit"/>
<b>Total</b>							<b>\$88.01</b>	<b>\$35.57</b>	

**Patient Benefits**

**Insurance Plan** Self Pay - abc123

The insured is Self Pay and will be responsible for 100% of the cost

When initiating a Cost Estimator from the Patient Setup screen, certain fields may not be pre-filled. Payer will load based on the patients primary payer in Patient Setup screen.

## 2. Add a line by **Appt Type** or **Manual Entry**

**Add Line by Appt Type** – Use this to add a service line for estimation by the type of appointment

This will search appointment types specific to your practice. Associating CPTs with Appointment Types is required to utilize this feature

### Add Line By Appointment Type

**Appt Type**

Appt Type Id	Appt Type Name	Appt Type Duration
28	New Patient	15
61	Telehealth - Established	30
62	Telehealth Visit	30

All Results Displayed (3)

**Add Line by Manual Entry** – Use this to manually add a CPT for estimate

This allows the user to enter a specific CPT code as well as Diagnosis code and modifier if needed.

Note required fields specified with the \*. Depending on your CPT setup **Unit, Charge per Unit** and **Allowed per Unit** may populate with the CPT selection. However, this screen allows manual entry as well as override.

If your company setting is set to use the "Payment Aggregated Allowed Amount" the Allowed Amount Usage will be defaulted to Aggregate and below it you will see Days to Aggregate which will display the default number of days but also allowing a manual override. You will also see a Records Used in Aggregate which will show how many payment records were used for the allowed amount payment aggregation. If your company setting is set to use the "Fee Schedule Allowed Amount" you will not see the additional aggregate fields.

**Add Line By Manual Entry** ✕

**CPT Code\***  ✕ Search

**Diagnosis Code**  Search

**Modifier**

**Unit\***

**Charge per Unit\***

**Allowed per Unit\***

**Allowed Amount Usage** Aggregate Fee Schedule

**Days to Aggregate**

↻ Update Allowed Amount

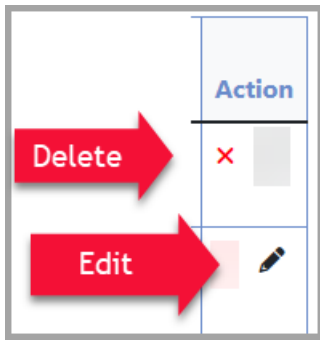
**Records Used in Aggregate** 0

Save Line

Below is an example of both entries in a single estimate

	Date of Service	Procedure	Diagnosis	Modifiers	Units	Billed per Unit	Allowed per Unit	Billed Total	Allowed Total	Action
<span style="border: 1px solid blue; padding: 2px;">Add Line By Appt Type</span> →	02/15/2023	99203 OFFICE OUTPT NEW 30 MIN			1	\$180.00	\$113.00	\$180.00	\$113.00	✕ ✎
<span style="border: 1px solid blue; padding: 2px;">Add Line By Manual Entry</span> →	02/15/2023	11100 BX SKN SUBQ/MUC MEMB 1 LESION			1	\$300.00	\$100.00	\$300.00	\$100.00	✕ ✎
<b>Total</b>								<b>\$480.00</b>	<b>\$213.00</b>	

Note the Action column which allows a line to be deleted or edited.



3. Select **Calculate** to run the estimate

### Patient Benefits

**Insurance Plan** Self Pay - abc123

The insured is Self Pay and will be responsible for 100% of the cost

**Calculate**

6. Once estimate has been created and reviewed for accuracy, click **Accept** to lock and save this estimate. If changes need to be made, make those then select **Calculate** before **Accept**.



7. When Accept has been selected, a pop up message will alert the locking of this estimate.

### Confirm

Are you sure you want to accept this estimate as final? This will lock the estimate and prevent future editing.

**Cancel** **Confirm**

Cancel will return to the previous screen for editing. Confirm will lock this estimate.

8. The summary of the estimate will be visible on the lower part of the screen. Click the print icon to print the

summary.

