

Text to Pay Overview

The Text to Pay feature is intended to aid practices in patient payment collection, by allowing users to send a payment request text link to the patient. This can be done for the collection of a co-pay or patient outstanding balance.

The Text to Pay feature works in conjunction with our PaySimple integration. Meaning a PaySimple merchant setup is needed to utilize the Text to Pay feature.

Setup Information

There are a couple company settings that will need to be enabled to allow the utilization of the Text to Pay feature. Along with these settings there is also the setup of the Text to Pay Practice info. You can find an explanation on these settings in the Text to Pay Setup documentation.

Text to Pay (Quick Pay Screen)

The text to pay request can be sent utilizing the Quick Pay screen. On the Quick Pay screen selecting the payment method of credit card will allow the selection of the Text to Pay button. Follow the below step by step instructions on how to do this.

Step-By-Step Instructions

1. Go to iScheduler portal.



2. Select the resource you would like to view appointments for.

September 2024										
Su	Мо	Tu	We	Th	Fr	Sa				
1	2	3	4	5	6	7				
8	9	10	11	12	13	14				
15	16	17	18	19	20	21				
22	23	24	25	26	27	28				
29	30	1	2	3	4	5				
Resource 🌣										
✓ Goldsmith, Clarence										
H	lein	ein	PA-0	D, M	latth	ew 🗌				

3. Right click on the patient appointment and select Quick Pay to Open the Quick Pay screen from a scheduled appointment. Note that the Quick Pay screen can also be opened by checking-in or checking-out an appointment.

	45		Арропалова несополос
-	9am	Test, Wes J. (Email)	Search Open Appointments
	15	24.118	Search Appointments
	30		Add to Recall List
	45	C.	Global Call Reminders
1	10am	\bigcirc	Validate Patient
	45		Send to FHIR
to			Send Communication
			Patient Setup
_	45		Patient History
	11 ^{am}		
	15		Patient Appointments
	30	<u> </u>	Open Patient in EMR
		<u>D</u>	Open Patient in Billing
_	45		Quick Pay
	12 ^{pm}		Authorizati Open the quick pay window
	15		open die quier pay window

4. **Optional**: You can choose any existing payment plans you wish to include from the Quick Pay screen by utilizing the "Payment Plan" search function.

Service L	ocation *										
Anoth	Another Dialysis Location X										
Payment Plan											
Search	Search Payment Plan										
ID	Date	Total	Installment	Card	Comment						
14	11/03/2024	\$200.00	\$16.6	7 No Card							
15	10/14/2024	\$131.58	\$21.9	3 No Card							
			Click to select this entry								

5. Document the payment information (amount, paid by, and type) and set the payment method to "Credit Card." Upon doing this you will see the Text to Pay button.

Claim: 682	w Receipt Detail 03 Total: S800.00 Balance: S790.00 Charge Rate: 100% nt Estimated Balance: S10.00 Use Co-pay amount		
Amount Paid By Type ID # Comment	* [510.00 * [(1) Wes J. Test ♥ [4]] * [Co-Pay ♥ Method * Credit Card ♥ 	Include Comment on Receipt Receipt Associated with Claim Create Receipt Take Payment Text to Pay	 Include Diagnosis on Receipt Include Procedures on Receipt

6. Click the Text to Pay button.

7. On the Text to Pay screen choose the phone number to send the text of the payment link to.

🗅 Te	ext to Pay - Worl	- Microsoft Edge — 🗆	×
Ô	https://qate	est.isalushealthcare.com/officemd/screens/PaySimpleTextToPay.htm?pid=92901&pname	A»
	D. d. d		
	Patient	Payment Amount	
	Wes J. Test	\$10.00	
	Toxt to Day D	hone Number	
	Text to Pay P		
	Select phone r	umber 🗸	
	(86	Home (Primary)	ך
	(86	Business (Primary)	
	(86	Other	
	Other		

- 8. Click Send.
- 9. You will receive a confirmation that the link Text to Pay link was successfully sent. Following this the Text to Pay screen will auto close.

Text to Pay - Work - Microsoft Edge		O	×
https://qatest.isalushealthcare.com/officemd/screens/PaySimpleTextToPay.htm?pid=92	901≺	ame	A٩
Patient Payment Amount			
Wes J. Test \$10.00			
Text to Pay Phone Number			D
Other 🗸			s
Enter phone number:			
	ſ	Send	
Text to Pay link successfully sent	Ľ		′

**Once the patient completes the payment they will be emailed a receipt for the payment. The payment will only

be reflected in the Receipt Transaction section of the Quick Pay window once the patient has completed the payment and the Quick Pay window is refreshed.

Text to Pay (Patient Setup Screen)

The text to pay request can be sent utilizing the Patient Setup screen. When sending a text to pay request from the Patient Setup screen the amount will be populated based on the patient balance. Follow the below step by step instructions on how to do this.

Step-By-Step Instructions

1. Within the Patient Setup screen click More on the toolbar and select Text to Pay.

Patient Setup	New Save Train	••• More	Blake,	Samuel R. Born 12/29/1970(53	y) Gender Male
	Chart 14314 1234 Test Street Amory, MS 38821 USA	Eligibility History Lab Result Entry Preferred Pharmacy Trickle Import	PCP SSN 999-99-9999 Marital Language	Employer Ethnicity Race	
	Medicare - Mississipp Medicare Part B Copay \$0.00	Intake Assignment MyMedicalLocker Admin	Sig. On File 11/20/2003 Group/Policy #		
	Samuel R. Blake 1234 Test Street	Office Communications			
Summary	Amory, MS 38821 USA	Patient Communications Print / Fax Queue			
Demographics Insurance	Balance: \$16.19 Current 31 - 60 \$0.00 \$0.00	Primary Ins. Card			
esponsible Party		Ould Day			
nergency Contact		Text to Pay			
Comments		Credit Balance			
ase Management		Phone Encounter			
Dialysis					
IML Self Schedule					
Sliding Fee					
lmmun. Registry					
atient Extension					
Miscellaneous					
Referral Tracking					

2. On the Text to Pay screen choose the phone number to send the text of the payment link to.

1] Text to Pay - Work - Microsoft Edge — 🗆 🗙	<
-	https://qatest.isalushealthcare.com/officemd/screens/PaySimpleTextToPay.htm?pid=14314×t A	h
1	Patient	
	Samuel R. Blake	
	Payment Amount	
	\$16.19	
	Text to Pay Phone Number	
	Select phone number	
L	(55 Home (Primary) Send	
L	(55 Business (Primary)	
L	Other	
L		

- 3. Click Send.
- 4. You will receive a confirmation that the link Text to Pay link was successfully sent. Following this the Text to Pay screen will auto close.

🗅 Text to Pay - Work - Microsoft Edge — 🗆	×
https://qatest.isalushealthcare.com/officemd/screens/PaySimpleTextToPay.htm?pid=14314×t	A»
Patient	
Samuel R. Blake	
Payment Amount	
S16.19	
Text to Pay Phone Number	
Other 🗸	
Enter phone number:	
Send	
Text to Pay link successfully sent	

**Once the patient completes the payment they will be emailed a receipt for the payment.

Text to Pay (Claim Entry Screen)

The text to pay request can be sent utilizing the Claim Entry screen. When sending a text to pay request from the Claim Entry screen the amount will be populated based on the claim balance. Follow the below step by step instructions on how to do this.

Step-By-Step Instructions

1. Within the Claim Entry screen click the Payments drop down on the toolbar and select Text to Pay.

Claim entry for	r Claim #44581 for S	amuel R. Bl	ake 12/29/1	970 (53y) -	Work - Mici	rosoft Edge						-	- 0	
🕆 https://q	atest.isalushealth	care.com/	/officemd/	screens/c	laimentry.l	htm?claimid=44	581&tin	nestmp	=17265	508298191&u1	=!michell8	lu2=D48339	908C379	/
												Search	for Patient	(
🛡 Open 🝷 🔚 :	Save 🝷 🚱 History	📩 P	ayments 🔹	E Patient	-					: 🏠 14314-В	ake, Samu	iel R. 29-De	c-1970 (53	y)
Status		💼 E	Edit Payment		nt					Service				
Claim	44581 -	🖄 E	Edit Receipt		tient	14314 - Samuel R. B	llake 🚽			Location	lp - North M	issisippi Medica	al Center	2
Status	In process - step 1, St	tatem 🧾 🤇	Credit Balance	•		(555) 337-2319 1234 Test Street An	(555) ory MS 38	337-2278 821	3	Rendering	Heinlein PA	-C, Matthew L.	(2
Substatus			Receipt Analys	sis	It. Location	Patient Location	ory mo oo	(2	Referring	Quillen MD,	Jon T.	(2
Level	Statement 🗸 E	Billing 💧 🛙	nvalid Paymer	nts	t. Provider	Patient Provider		(2			Referred		
Туре	Medical		~	R	⊿ esp. Party	Blake, Samuel R.		(2	☆ Other Pro	viders			
Owner	Pratt, Melissa		Q	In	s. Profile	Health Insurance			~	Alternate	Alternate Pr	ovider	(2
Assign To	Assigned To		- Q	P	rimary	(1) Medicare - Miss	ssippi	(2	Supervising	Supervisina	Provider	(Ē
837	Professional	nstitutional		s	econdary	Secondary Insuran	 ж	(2	Ordering	Ordering Pr	ovider	(
				Т	ertiary	Tertiary Insurance		(Attending	Attending P	rovider	(
					- Override I	neurance	18 A	uthorizati	00	Purchasing	Purchasing	Provider	(
Procedures	and Diagnoses	Procedure	POS		Procedu	re Amount		Mod	fiers		Diag	nosis »		_
From 1 08/22/2010	To	00224	21	Units	Charge	Amount	1	2	3	4 1 D210	2	3	4	-
2 08/22/2019	9 3 08/22/2019	33221	~	1.00		50.00				R310	110			-
Additional In	m			Mess	ages and	Total: \$150.00	Pay/Adj	(\$64.5	4) Bala	nce: \$16.19 Re Queue and 1	ceipts: \$0.0 Fasking	0 -		
Admission	08/14/2019 😂 💳	Hour	~	Agir	Ig	0				The Queue ar	Tasking proc	ess is currently	disabled.	
Discharge	\$	Hour	~	Billin	ng Message	× .				Click here to run this process.				
Initial	\$			Pati	Claim Validation									
Onset				Pati	ent Only	N/A								
Current Claim Edits				Cod	Code Limitations N/A									
🥟 Dates	sellane Miscellane	ous		Req	uired Fields	N/A								
				837	Validation	N/A								
				Mon	itoring	N/A								
+ Add Informa	tion			🌲 Al	erts	Comments (13)		Activity L	og					

2. On the Text to Pay screen choose the phone number to send the text of the payment link to.

1] Text to Pay - Work - Microsoft Edge — 🗆 🗙	<
-	https://qatest.isalushealthcare.com/officemd/screens/PaySimpleTextToPay.htm?pid=14314×t A	h
1	Patient	
	Samuel R. Blake	
	Payment Amount	
	\$16.19	
	Text to Pay Phone Number	
	Select phone number	
L	(55 Home (Primary) Send	
L	(55 Business (Primary)	
L	Other	
L		

- 3. Click Send.
- 4. You will receive a confirmation that the link Text to Pay link was successfully sent. Following this the Text to Pay screen will auto close.

🗅 Text to Pay - Work - Microsoft Edge — 🗆	×
https://qatest.isalushealthcare.com/officemd/screens/PaySimpleTextToPay.htm?pid=14314×t	A»
Patient	
Samuel R. Blake	
Payment Amount	
S16.19	
Text to Pay Phone Number	
Other 🗸	
Enter phone number:	
Send	
Text to Pay link successfully sent	

**Once the patient completes the payment they will be emailed a receipt for the payment.