

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.

Θ	s	epte	mbe	er 20)24	$\overline{\mathbf{O}}$		
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								
Heinlein PA-C, Matthew								

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.

		appointerioriti	
	45	EQ	
1	9am	Test, Wes J. (Email) 24.118	Search Open Appointments
	15	24.118	Search Appointments
	30	AAOF 1	Add to Recall List
	45	<u> </u>	Global Call Reminders
ì		Q	Validate Patient
	10 ^{am}		Send to FHIR
h			Send Communication
	30		
	45	L.	
1	11am	3	Patient History
	···		Patient Appointments
	15	D	Open Patient in EMR
	30		Open Patient in Billing
	45		
	12 ^{pm}		
	15		Authorizati Open the quick pay window
	1.5		

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.

	ocation * er Dialysis Location				X Search					
Payment	•				A Search					
Search	Search Payment Plan									
ID	Date	Total	Installment	Card	Comment					
14	11/03/2024	\$200.00	\$16.67	No Card						
15	10/14/2024	\$131.58	\$21.93	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: 6820	v Receipt Detail 3 Total: \$800.00 Balance: \$790.00 Charge Rate: 100% t Estimated Balance: \$10.00 Use Co-pay amount		
Amount Paid By Type ID # Comment	= \$10.00 = (1) Wes J. Test ♥ = 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)	ן ר
	(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		D	×
https://qatest.isalushealthcare.com/officemd/screens/PaySimpleTextToPay.htm?pid=92	2901&pn	ame	A»
Patient Payment Amount			
Wes J. Test \$10.00			
Text to Pay Phone Number			Þ
Other 🗸			s
Enter phone number:			
	ſ	Send	וו
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 Secondary Ins. Card			
lesponsible Party					
nergency Contact		Quick Pay Text to Pay			
Comments		Credit Balance Reminder			
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.

ים	ext to Pay - W	/ork - Microsoft Edge		O	×
ĉ) https://q	atest.isalushealthcare.com/officemd/screens/PaySimpleTextToPay.htm?pid=143	314&tin	nest	A٩
	Patient				
	Samuel R.	Blake			
	Payment A	Amount			
	\$16.19				
	Text to Pay	y Phone Number			
	(55	Home (Primary)	ſ	0 1	ר ו
	(55	Business (Primary)	L	Send	J
	Other				

- 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 — 🗆	×
ttps://qatest.isalushealthcare.com/officemd/screens/PaySimpleTextToPay.htm?pid=14314×t	A»
Patient	
Samuel R. Blake	
Payment Amount	
\$16.19	
Text to Pay Phone Number	
Other V	
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.

Interp://qatest.isalushealthcare.com/officemd/screens/claimentry.htm?claimid=445818timestrep=17265082981918u1=1michell8u2=D4833908C379 Search for Platest Open Interp://qatest.isalushealthcare.com/officemd/screens/claimentry.htm?claimid=445818timestrep=17265082981918u1=1michell8u2=D4833908C379 Search for Platest Status Interp://qatest.isalushealthcare.com/officemd/screens/claimentry.htm?claimid=445818timestrep=1726508298198 Search for Platest Overef Fatige Produce Interp://qatest.isalushealthcare.com/officemd/screens/claimentry.htm?claimid=445818timestrep=1726508298198 Search for Platest Overef Fatige Produce Interp://qatest.isalushealthcare.com/officemd/screens/claimentry.htm?claimid=445818timestrep=17265082 Search for Platest.isalushealthcare.com/officemd/screens/claimentry.htm?claim	Claim entry for	r Claim #44581 for S	amuel R. Bl	ake 12/29/1	970 (53y) -	Work - Micr	osoft Edge						-	- 0	
Poren Issue Issue <t< td=""><td>🕆 https://q</td><td>atest.isalushealth</td><td>care.com/</td><td>/officemd/</td><td>screens/c</td><td>laimentry.ł</td><td>ntm?claimid=4458</td><td>1&tim</td><td>estmp=</td><td>172650</td><td>8298191&u1</td><td>=!michell&</td><td>lu2=D48339</td><td>908C379</td><td>/</td></t<>	🕆 https://q	atest.isalushealth	care.com/	/officemd/	screens/c	laimentry.ł	ntm?claimid=4458	1&tim	estmp=	172650	8298191&u1	=!michell&	lu2=D48339	908C379	/
Status Edit Payment rt Service Claim 4581 - Edit Recept rent 14314 - Samuel R Bake - Service Status Improcess - step 1. Stater Credit Balance rent 14314 - Samuel R Bake - Service Status Improcess - step 1. Stater Tot to Pay IL Location Patient Location Recept Analysis Level Statement Billing Provider Patient Location Recept Analysis Cover Patient Location It so Fortio Patient Location Referring Collent Powder Owner Profit. Melissa Ins. Fortio Patient Powder Referring Cover Powder B37 Professional Institutional Secondary Insurance Patient Annual Attendar Powder B37 Procedures and Diagnoses Procedure Annual Modifier Diagnosis 3 # Procedures and Diagnoses Procedure Annual Modifier Diagnosis 3 # Procedure Balance Powder Annual Modifier Diagnosis 3 # Procedure Balance Provider Annual Modifier Diagnosis 3 <													Search	for Patient	(
Claim 4581 + Credit Balance Itent 14314 - Samuel R. Blake + Location Location Itent Massispip Medical Center Rendering Heinet Instruction Location Itent Massispip Medical Center Rendering Heinet Instruction Secondary Instruction Rendering Rendering Concer Provider Go Concertor Go Concert	🛡 Open 🝷 🖬 :	Save 🝷 🚱 History	📩 P	ayments 🔹	E Patient	•				:	ᡖ 14314-ВІ	ake, Samu	iel R. 29-De	c-1970 (53	y) (
Claim Websit Credit Balance Status In process-step 1. Stater Credit Balance Substatus In process-step 1. Stater Recept Analysis Substatus Stater Credit Balance Substatus Excel Analysis Substatus Stater Recept Analysis Level Stater Coston Type Medical Resp. Party Diversion Toride Provider Assign To Assign To Secondary Secondary Secondary Insurance Pinnary Override Insurance Procedures Alternate Provider Statemate Procedures Procedure Anount Modifiers Override Insurance Procedure Anount Modifiers Diagnosis P # From Procedure Procedure Anount Modifiers Diagnosis P # Secondary Insurance Procedure Anount Modifiers Diagnosis P Attending # Secondary Insurance Procedure Anount Modifiers Diagnosis P Attending # Secondary Insurance Procedure Anoun	Status		💼 E	Edit Payment		nt					Service				
Staus In process - step 1. State Receipt Analysis 1234 Test Street Amony MS 3821 Redering Heinein PA-C, Matthew L Referring Substaus Image Provider Provider Referred Refered<	Claim	44581 -				tient	14314 - Samuel R. Bla	e -			Location	lp - North M	issisippi Medica	al Center	Q,
Substatus Level Statement Builing Product Poyments Level Statement Builing Product Poyments Resp. Party Black Savuel R. Cover Pratt. Melical Downer Pratt. Melisaa Cover Pratt. M	Status	In process - step 1, St	at a m								Rendering	Heinlein PA-	-C, Matthew L.	(2
Level Statement Billing Provider Patient Provider Resp. Party Billing Resp. Party Billing Assign To	Substatus				SIS	l r		WI3 300	<u>_</u>	1	Referring	Quillen MD.	Jon T.	(
Type Medical Image: Signed To Resp. Party Blake, Samuel R. Image: Signed To Image: Signe: Signed To Image: Signed To<	Level	Statement V			nts	It. Provider	Patient Provider		Q	1	-		Referred		
Owner Pratt Melissa Assign To Assign To Assign To Assign To Assign To Assign To S37			1			esp. Party	Blake, Samuel R.		Q	i	♦ Other Pro	viders			_
Assign To		Pratt Melissa		0			Health Insurance		-				ovider	(2
837 ● Professional ● Institutional Secondary Secondary Tertiary Tertiary Tertiary Tertiary Tertiary Tertiary Override Insurance Image: Authorization Procedures and Diagnoses Purchasing Procedure and Diagnoses Purchasing Purchasing Purchasing Posedure POS Units Charge Annount 1 1 08/22/2019 0 08/22/2019 0 08/22/2019 0 08/22/2019 0 08/21/2019 0 08/21/2019 0 08/21/2019 0 08/21/2019 0 08/21/2019 0 08/21/2019 0 08/21/2019 0 08/21/2019 0 08/21/2019 0 08/21/2019 0 08/21/2019 0 08/21/2019 0 08/21/2019 0 08/21/2019 0 08/21/2019		,		0				ppi	0	1				(
Tertiary Tertiary Tertiary Attending Attending Attending Attending Attending Attending Purchasing Purchasing <td< td=""><td>- 1</td><td>-</td><td>nstitutional</td><td>~</td><td></td><td></td><td></td><td>e e*</td><td></td><td></td><td></td><td></td><td></td><td></td><td>0</td></td<>	- 1	-	nstitutional	~				e e*							0
Override Insurance Image: Control of the control						-					-				
Procedure sand Diagnoses # Service Date From Procedure POS Units Charge Amount 1 2 3 4 1 2 3 4 1 2 3 4 1 2 3 4 1 2 3 4 1 2 3 4 1 2 3 4 1 2 3 4 1 2 3 4 1 2 3 4 1 2 3 4 1 2 3 4 1 2 3 4 1 2 3 4 1 2 3 4 1 2 3 4 1 2 3 4 1 2 3 4 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 <th< td=""><td></td><td></td><td></td><td></td><td></td><td>_ ' '</td><td></td><td></td><td></td><td></td><td>-</td><td></td><td></td><td></td><td>-</td></th<>						_ ' '					-				-
# From To Proceedure POS Units Charge Amount 1 2 3 4 1 2 3 4 1 08/22/2019 08/22/2019 99221 21 1.00 \$150.00 \$150.00 \$150.00 \$150.00 \$130.01 10 10 2 08/22/2019 08/22/2019 08/22/2019 08/22/2019 \$0.00 \$100 \$150.00 \$150.00 \$150.00 \$130.01 10 \$100 \$100 \$100 \$100 \$100 \$100 \$100 \$100 \$100 \$100 \$100 \$100 \$100 \$100 \$100 \$100 \$100 \$100 \$100 \$100 \$100 \$100 \$100 \$100 \$100 \$100 \$100 \$100 \$100 \$100 \$100 \$100 \$100 \$100 \$100 \$100 \$100 \$100 \$100 \$100 \$100 \$100 \$100 \$100 \$100 \$1000 \$1000 \$1000					1	Procedu	re Amount		Modifie	rs		Diag	nosis »		
2 08/22/2019 08/22/2019 08/22/2019 08/22/2019 08/22/2019 08/22/2019 08/22/2019 08/22/2019 08/22/2019 08/22/2019 08/22/2019 08/22/2019 08/22/2019 08/22/2019 08/22/2019 08/22/2019 08/22/2019 08/22/2019 0 100 0		То	Procedure	POS	Units			1			1			4	
Image: Contract of the second sec			99221	21 🗸	1.00	\$15	50.00 \$150.0	0			R310	110			
Additional Information Messages and Monitoring Queue and Tasking Admission 06/14/2019 Hour Aging Billing Message Claim Validation Patient Validation Patient Validation Patient Only N/A Corrent Claim Edits Miscellaneous Miscellaneous The Queue and Tasking process is currently disabled. Current Claim Edits Patient Only N/A Monitoring N/A Bi37 Validation Monitoring Alerts Comments (13) Alerts	2 08/22/2019	9 🗘 08/22/2019 😂		~		\$	\$0.00				R310	110			
Discharge Hour Discharge Hour Initial Image: Claim Validation Initial Image: Claim Validation Onset Image: Claim Validation Onset Image: Claim Validation Patient Only N/A Current Claim Edits Patient Only Image: Validation Validation Image: Validation Valida					Mess	ages and		ay/Adj:	(\$64.54)				0 -		
Discharge Hour Initial Onset Onset Patient Validation Patient Only N/A Code Limitations N/A Global Period N/A Monitoring N/A Alerts Comments (13) Other Indict Or Init Displaced as a state of the displace	Admission	08/14/2019 😂 💳	Hour	~	Agir	ig	()				The Queue an	Tasking proc	ess is currently	disabled.	
Initial Patient Validation Onset Patient Validation Current Claim Edits Patient Only N/A Code Limitations N/A Code Limitations N/A Global Period N/A 837 Validation Monitoring Monitoring N/A	Discharge	\$	Hour	~			×				Click here to n	un this proces	<u>S.</u>		
Onset Patient Only N/A Current Claim Edits Code Limitations N/A Plates Miscellaneous Required Fields N/A Global Period N/A 837 Validation Monitoring Monitoring N/A Aterts Comments (13) Inter Activity Log	Initial						. Š								
Current Claim Edits Required Fields N/A Dates Miscellaneous Global Period N/A 837 Validation Monitoring N/A	Onset														
Global Period N/A 837 Validation Monitoring N/A Alerts © Comments (13) In Activity Log	Current Claim Edits				Cod	e Limitations	N/A								
Global Penod N/A 837 Validation Monitoring N/A	Dates Miscellaneous														
Monitoring N/A		12													
Alerts Comments (13)							-								
	Add Informa	fion						chi Ad	tivity Log	ן ר					

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

ים	ext to Pay - W	/ork - Microsoft Edge		O	×
ĉ) https://q	atest.isalushealthcare.com/officemd/screens/PaySimpleTextToPay.htm?pid=143	314&tin	nest	A٩
	Patient				
	Samuel R.	Blake			
	Payment A	Amount			
	\$16.19				
	Text to Pay	y Phone Number			
	(55	Home (Primary)	ſ	0 1	ר ו
	(55	Business (Primary)	L	Send	J
	Other				

- 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 — 🗆	×
ttps://qatest.isalushealthcare.com/officemd/screens/PaySimpleTextToPay.htm?pid=14314×t	A»
Patient	
Samuel R. Blake	
Payment Amount	
\$16.19	
Text to Pay Phone Number	
Other V	
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.