

Routine & Non-Insurance

- ❑ Access The Patient Either From The **PATIENT** By Selecting **INVOICE** Or **OPTICAL CHECKOUT TAB** By Selecting The Patient And Then **ADD INVOICE**
- ❑ Upon Completion Of The Exe Exam, Your Doctor Will Send Over Procedural And Diagnosis Codes.
- ❑ If They Do Not Come Over, Or You Need Add Additional Services, You Can Manually Enter By Using The Pull-down Bars And The Professional Services Button On The Bottom Left Side Of The Pop-up Window
- ❑ If you need to delete a service, select the hamburger on the right side

Item ID	Qty	ICD Code(s)	Procedure/Product Code	Provider	Insurance	Usual/Cust	Allowable	Ins. Res.	Ins. Adjust	Pt. Disc	Co-Pay	Pt. Res.	Total Pt. Tax	Pt. Balance	Ins. Balance
1			92014-EST Comprehensive	Toomey, Sara	EyeMed Vision-Coh	\$140.00		\$0.00	\$0.00	\$140.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

- ❑ For All Routine & Non-insurance, Patients, Select The Discount Button To Zero Out The Invoice

- ❑ Once Discount Window Pops Up, Select The Item(s) You Want To Discount And Fill Out The Reason, \$ Or %, And How Much
- ❑ Select Save When Finished

Qty	Procedure	Code	Fee	Adjust.	\$ Disc.	Co-Pay	Ins. Res.	Pt. Res.
1	92014-EST Comprehensive	92014	\$140.00	\$0.00	\$140.00	\$0.00	\$0.00	\$0.00

Details

Reason: Manager's Request Discount Code:

Method: \$ Amount % Original % Current \$ 140

Net Discount:

- ❑ Post To Account & Proceed To Process/Bill In Ciao!
- ❑ When promoted about recall, select YES

- ❑ Refer To **Insurance Binder** If You Have Questions Regarding Routine Plans

Medical Insurance

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Love Test (37/F)
IN25963
Location: T047 - Triangle Vision - Gastonia
Date of Service: 05/11/2023

ICD Codes - Click letter button to toggle on/off for all line items. Select the drop down to add additional ICD codes.

Item ID	Qty	ICD Code(s) Modifier(s)	Procedure/Product Code	Insurance Staff Member	Usual/Cost Fee	Allowable	Ins. Res.	Ins. Adjust	Pt. Disc.	Co-Pay	Pt. Res.	Total Pt. Tax	Pt. Balance Ins. Balance
1	1		92014 92014-EST Cor	EyelMed (Vision-Opt)	\$140.00		\$0.00	\$0.00	\$140.00	\$0.00	\$0.00	\$0.00	\$0.00
				Toomey, Sara			0%				0%		

- ❑ For All Medical Insurance Plans, Eclips Will Auto-calculate The Insurance Responsibility

MEDICAL PLANS

PLAN PAYS in Ciao! Optical - take note of it. This doesn't print on an invoice!

=Patient Resp or Copays should be entered into COPAY column Ciao! Optical

PT BAL should always be \$0 (apply payments). Only BAL left is Ins. Balance.

VERY IMPORTANT: In Ciao! Optical - DO NOT reduce Plan Pays by Copay Amount. We do this for Routine but not for Medical, this is already covered when you apply it in Eclips.

Item ID	Qty	ICD Code(s) Modifier(s)	Procedure/Product Code	Insurance Staff Member	Usual/Cost Fee	Allowable	Ins. Res.	Ins. Adjust	Pt. Disc.	Co-Pay	Pt. Res.	Total Pt. Tax	Pt. Balance Ins. Balance
1	1		9214 - 9214- EAM Lu	Blue Cross Blue	\$200.00	\$14.29	\$18.71	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$18.71
				Smith			44.14%						
1	1		92134 - 92134 Routine O	Blue Cross Blue	\$100.00	\$79.09	\$20.91	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$20.91
				Smith			100%						
Totals					\$300.00	\$113.88	\$186.12	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$39.62

- ❑ Record Patient Copay By Selecting The Pay Button And Completing The Payment Details
- ❑ When Prompted About Recall, Select YES

CLOSE Transfer Responsibility Write-Off **Pay** Print Return Save

Payment

Selected Invoices

Invoice #	Amount	Paid	Pt. Balance	Payment
IN23834	\$140.00	\$0.00	\$140.00	\$20.00
Total Payment				\$20.00

Payment Details

Cash Credit Card **Debit Card** Check Unapplied Payments Other

Amount \$20.00

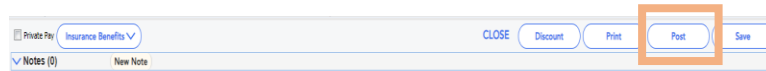
Type Visa

Card Last 4 Digits 1234

Note

Creating An Invoice In ECLIPS

- ❑ Post To Account & Proceed To Process In Ciao!

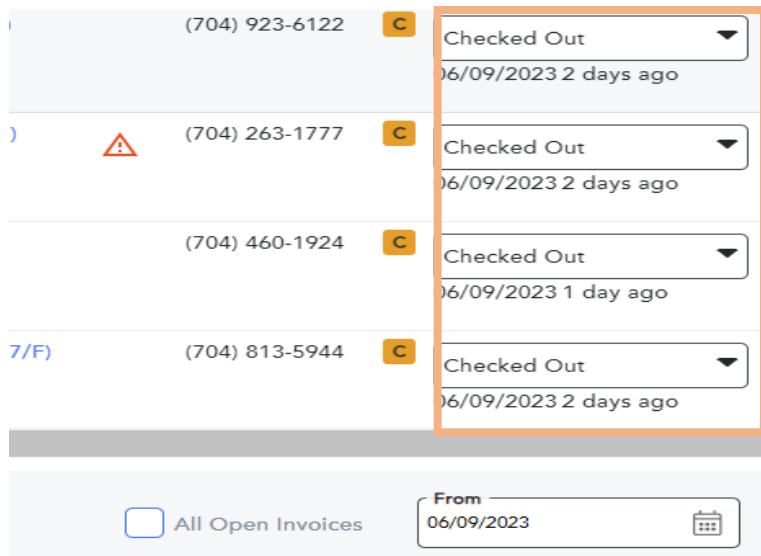


The screenshot shows a top navigation bar with a dropdown menu for 'Insurance Benefits'. To the right are buttons for 'CLOSE', 'Discount', 'Print', 'Post', and 'Save'. The 'Post' button is highlighted with an orange rectangular box.

- ❑ Refer To **Insurance Binder** If You Have Questions Regarding Medical Plans

FOR ALL PATIENTS (ROUTINE, MEDICAL, NON-INSURANCE) YOU MUST COMPLETE THE FOLLOWING:

- ❑ On The **HOME TAB** All Patients Should Be Checked Out (See Scheduling Next Exams Guide For Scheduling Process) And All Invoices Posted By The End Of The Day



The screenshot shows a list of four patients. Each row has a phone number, a status icon (orange 'C' or a warning triangle), and a dropdown menu. The dropdown menu for the first patient is highlighted with an orange box and shows 'Checked Out' and the date '06/09/2023 2 days ago'.

Phone Number	Status Icon	Status	Date
(704) 923-6122	C	Checked Out	06/09/2023 2 days ago
(704) 263-1777	⚠	Checked Out	06/09/2023 2 days ago
(704) 460-1924	C	Checked Out	06/09/2023 1 day ago
(704) 813-5944	C	Checked Out	06/09/2023 2 days ago

Below the list, there is a section with a checkbox labeled 'All Open Invoices' and a date selector labeled 'From 06/09/2023'.

Type	Patient
Posted	Kendrick, Leslie
Posted	Devenny, Larry
Posted	Owensby, Jason P
Posted	Thomas, Harvey
Posted	Archibald, Ian
Posted	Seagle, Kathryn

- ❑ Schedule The Patient Their Tentative Next Eye Exam By Going Back To The **SCHEDULER** And Selecting Check Out And Follow The Prompts