

MEDFORD
 Complete Integrative Care
 3156 State St., Medford, OR 97504
 (541) 773-9772
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EAGLE POINT
 Complete Care Health Centers
 1296 South Shasta Ave. Eagle Point, OR 97524
 3132 State St., Medford, OR 97504
 (541) 830-4325
 (541) 826-2620

Procedure Title:	DAR – Daily Accounts Receivable
Date:	03/05/25
Version:	
Department:	CIC/CCHC
Approved By:	

Purpose: We strive to efficiently collect outstanding patient balances promptly while being understanding and informative with each of our patients. With the DAR, this allows us to be knowledgeable in approaching patients regarding balances and providing proper communication so they can make necessary arrangements to pay their balances in full.

Procedure:

1. At the beginning of each scheduled shift, the billing team member assigned to the DAR will access the eligibility and phone list in Athena.
 - a. From the purple bar>calendar>eligibility and phone list>select the date, department, and sort by provider then by time>press refresh.
2. From OneDrive (One drive>billing archives>DAR), open the DAR template titled:
 - a. CIC Providers
 - b. CCHC Medford
 - c. CCHC EP
3. The biller is responsible for going through each account populated researching credits, account balances, and unverified or ineligible policies, and making notes on the spreadsheet.
 - a. *For CCHC:*
 - i. *The biller should make sure all insurance(s) have verification notes and that they have been updated in the current year for which the patient is scheduled.*
 - ii. *Notations for needed re-evaluations, waivers, or oswestries should be clearly notated on the spreadsheet.*
 - b. *For CCHC & CIC: It is a requirement for **ALL OHP** patients that we verify on the Medicaid (MMIS) and/or CCOA provider portal to confirm they have not been switched to a new plan and are still eligible for coverage.*
 1. *All **OHP** patients are required to be re-verified on the first of each month*
 2. *Any patient registered as self pay needs to be checked on the OHP provider portal to ensure they are not an active medicaid patient. If no eligibility is found, please add an alert to the patient’s account. (i.e (insert date) NO OHP FOUND)*

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- c. *It is the biller’s responsibility to print & fill out any waivers or billing forms that are required for patients at the time of check in. It is also REQUIRED that the patient is still put on the DAR spreadsheet indicating that there is a form the patient must sign so that reception is aware they need to look for this.*
 - i. *These forms will be attached and emailed to our reception team with the DAR daily.*
4. Once accounts have been reviewed, save the Excel spreadsheet to OneDrive with the date of the DAR to the appropriate department folder.
 - a. Example: If you are verifying DOS 01/01/2024 for CCHC EP please save the document as 01.01.24 to the CCHC EP DAR folder.
5. Generate an email to ‘Reception’ and ‘Billing’ titling it “(CIC or CCHC) DAR – (date) and attach all CCHC or CIC spreadsheet(s) and forms for reception to review.
6. It is then the responsibility of the reception team to print this off daily to have for reference when patients check in.
7. If a patient refuses to pay their balance reception ***MUST*** notate the patient account.
 - a. Navigate to the patient quickview>click patient account view and scroll to the bottom.

Outstanding Balances			
Complete Integrative Care			
Total balances	Total	Insurance	Patient
	\$0.00	\$0.00	\$0.00
Patient outstanding balance ?	Statement	\$0.00 (in collections: \$1,097.79 to General Credit Services)	
	Payment plan	\$0.00	
	Prepayment plan	\$0.00	
	View billing summary View patient activity Patient account view E-payment activity		

- b. Under action, select ‘note’.
- c. Add a note stating the patient was informed of their account balance and why they chose not to pay.
- d. Press apply action.

Action	NOTE
Note	<input type="text"/>
Next Statement Date	05/08/2020
Alarm	<input type="checkbox"/> Clear account alarm
<input type="button" value="Apply Action"/>	

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8. If needed, the lead biller will go through the DAR and alert ADMIN or reception team leads with any additional questions or needed clarifications.
9. After forms have been completed, it is the responsibility of the reception team to scan them daily prior to the end of their shift.

Things to consider:

1. If a patient cannot pay their balance in full and wants to be set up on a payment plan, please indicate that in the notes and immediately alert the CCHC or CIC on-site billing team member. They will be able to get this payment plan set up in the clinic.
 - a. *This can be done before or after the appointment. Please have clear communication with MA/CA and Billing Staff so that there can be a plan prior to the patient checking out and leaving the clinic.*
2. For a patient to avoid further collections action on their account they must be set up on a formal payment plan.