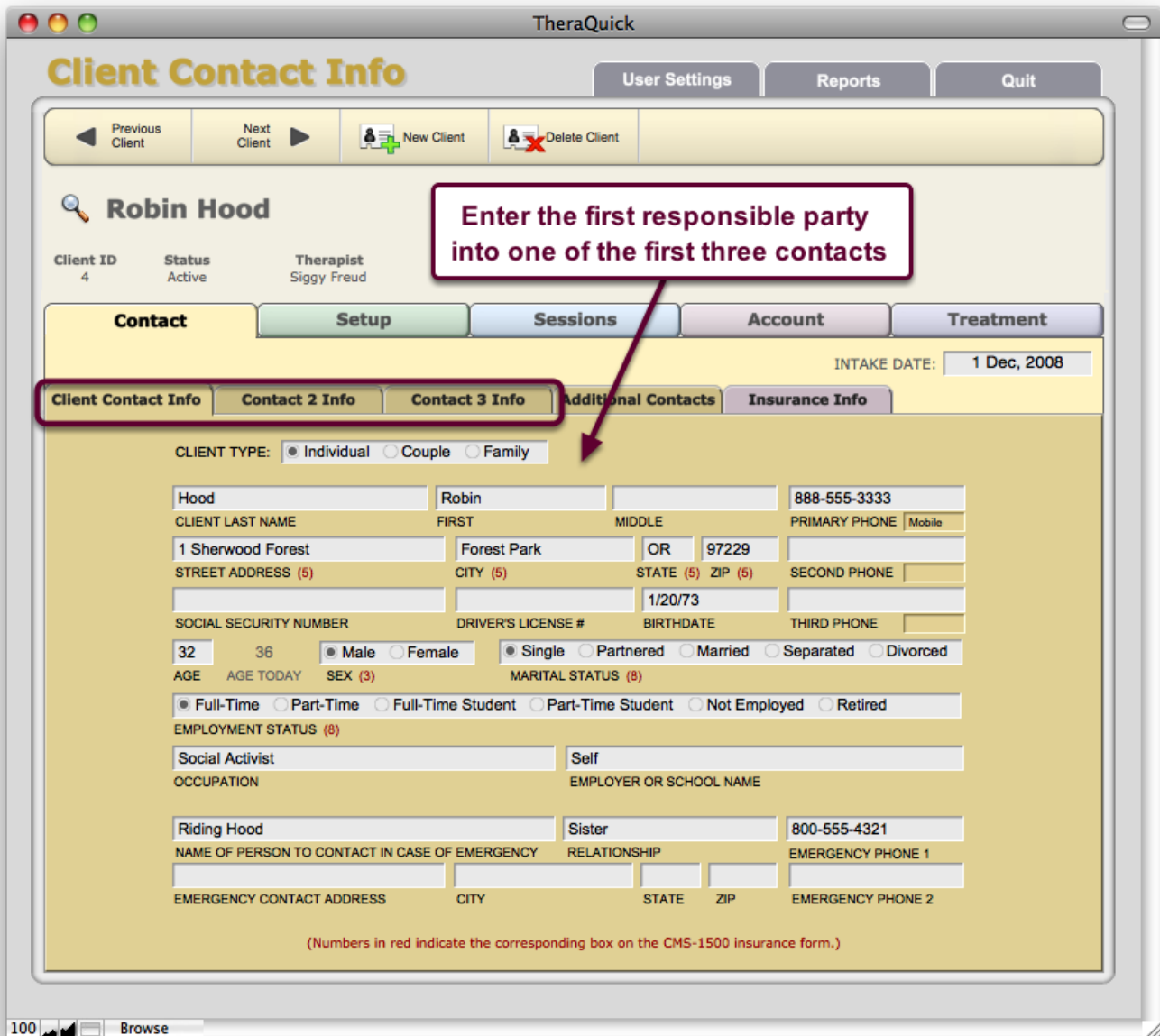


Setting Up a Client With Two Responsible Parties

How to setup the billing information for a client who is using two responsible parties to pay for the sessions.

Enter information for the first responsible party under one of the first three Client Contact layout subtabs.



Client Contact Info

Client ID: 4 Status: Active Therapist: Sigggy Freud

INTAKE DATE: 1 Dec, 2008

CLIENT TYPE: Individual Couple Family

Hood Robin 888-555-3333
CLIENT LAST NAME FIRST MIDDLE PRIMARY PHONE (Mobile)

1 Sherwood Forest Forest Park OR 97229 SECOND PHONE
STREET ADDRESS (5) CITY (5) STATE (5) ZIP (5)

1/20/73 THIRD PHONE
SOCIAL SECURITY NUMBER DRIVER'S LICENSE # BIRTHDATE

32 36 Male Female Single Partnered Married Separated Divorced
AGE AGE TODAY SEX (3) MARITAL STATUS (8)

Full-Time Part-Time Full-Time Student Part-Time Student Not Employed Retired
EMPLOYMENT STATUS (8)

Social Activist Self
OCCUPATION EMPLOYER OR SCHOOL NAME

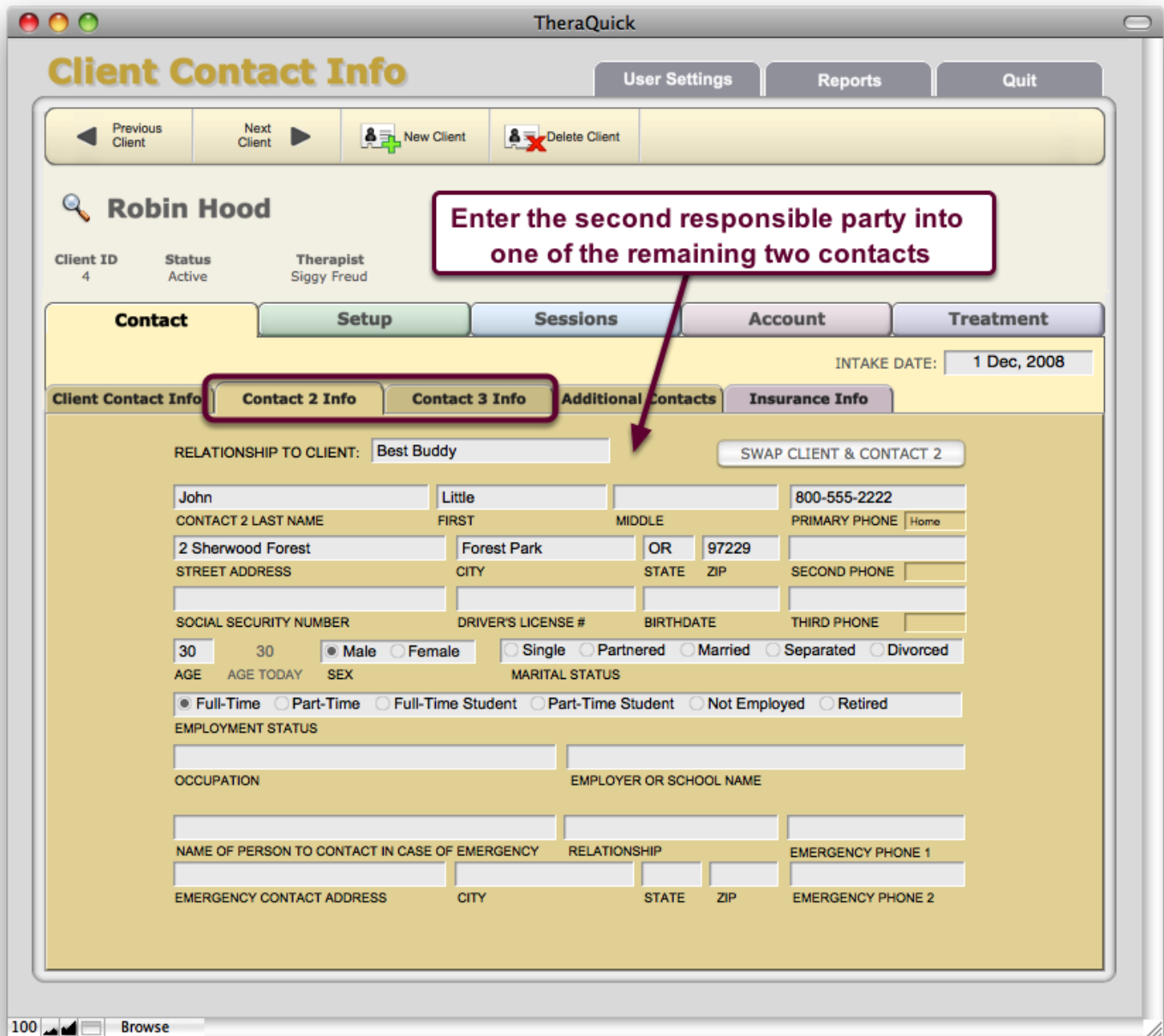
Riding Hood Sister 800-555-4321
NAME OF PERSON TO CONTACT IN CASE OF EMERGENCY RELATIONSHIP EMERGENCY PHONE 1

EMERGENCY CONTACT ADDRESS CITY STATE ZIP EMERGENCY PHONE 2

(Numbers in red indicate the corresponding box on the CMS-1500 insurance form.)

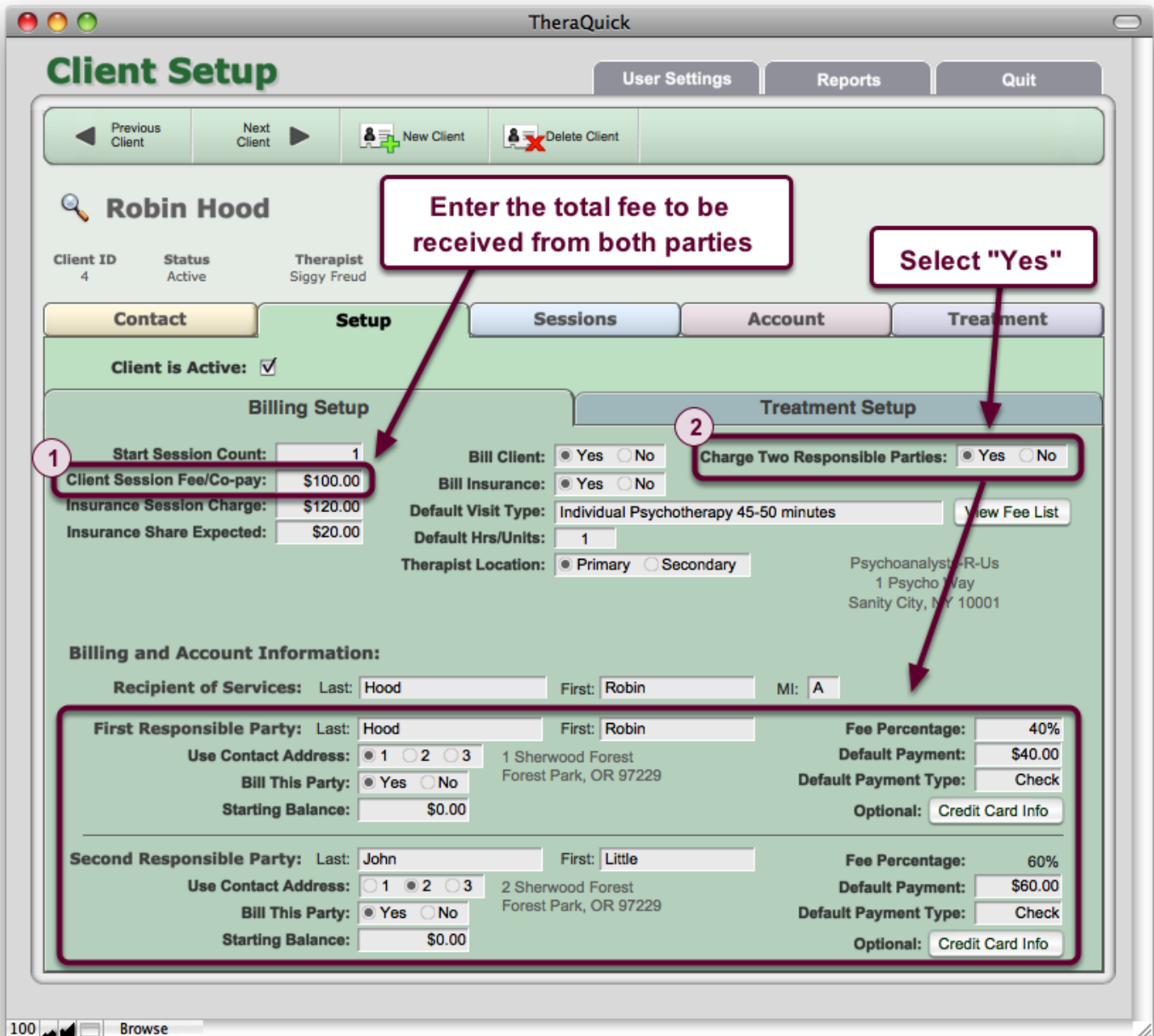
The first responsible party can be any of the contacts entered under the Client Contact Info, Contact 2 Info, or Contact 3 Info subtabs. In this example, the client, Robin Hood, is one of the responsible parties (entered under Client Contact Info).

Enter information for the second responsible party under another one of the Contact subtabs.



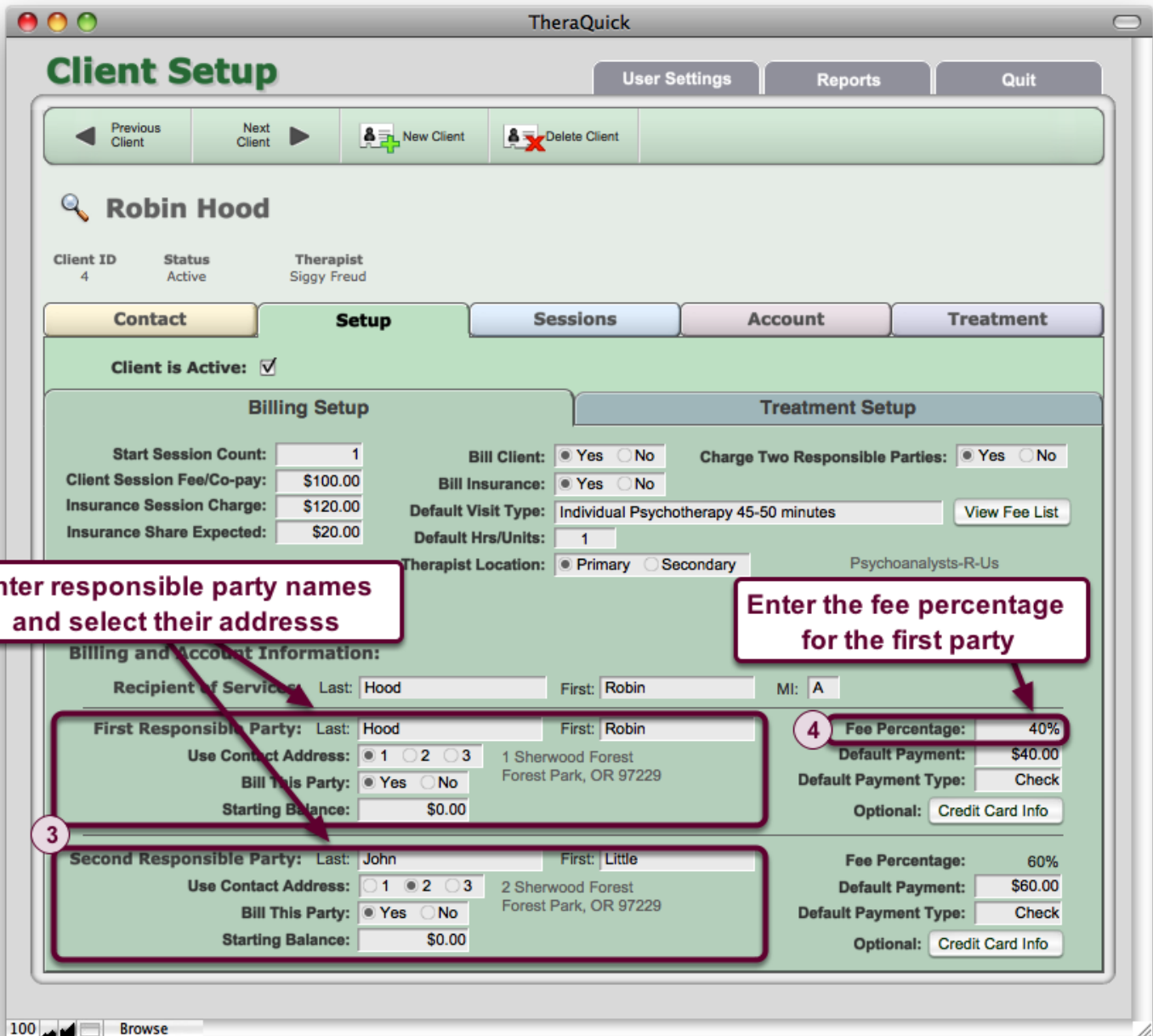
The second responsible party can be any of the remaining contacts under the Client Contact Info, Contact 2 Info, or Contact 3 Info subtabs (other than the contact used for the first responsible party). In this example, the second responsible party is Little John, entered under Contact 2 Info.

Navigate to the Client Setup layout. (1) Enter the amount you will be paid from both parties together in the Client Session Fee/Co-pay field. (2) Select "Yes" for Charge Two Responsible Parties.



The Client Session Fee/Co-pay is the total amount you will be billing or expecting from both responsible parties together. In this example, the Client Session Fee/Co-pay is \$100. When you select "Yes" for Charge Two Responsible Parties, the fields will appear where you can enter details for each party.

(3) Enter the names for the first and second responsible parties, select their contact addresses (if you will be sending billing statements), and (4) enter the fee percentage (as a decimal) into the Fee Percentage for the first party.



Client Setup

Robin Hood

Client ID: 4 Status: Active Therapist: Siggy Freud

Setup

Client is Active:

Billing Setup

Start Session Count: 1
 Client Session Fee/Co-pay: \$100.00
 Insurance Session Charge: \$120.00
 Insurance Share Expected: \$20.00

Treatment Setup

Bill Client: Yes No
 Bill Insurance: Yes No
 Charge Two Responsible Parties: Yes No
 Default Visit Type: Individual Psychotherapy 45-50 minutes
 Default Hrs/Units: 1
 Therapist Location: Primary Secondary
 Psychoanalysts-R-Us

Billing and Account Information:

Recipient of Services: Last: Hood First: Robin MI: A

First Responsible Party: Last: Hood First: Robin
 Use Contact Address: 1 2 3 1 Sherwood Forest Forest Park, OR 97229
 Bill This Party: Yes No
 Starting Balance: \$0.00

Second Responsible Party: Last: John First: Little
 Use Contact Address: 1 2 3 2 Sherwood Forest Forest Park, OR 97229
 Bill This Party: Yes No
 Starting Balance: \$0.00

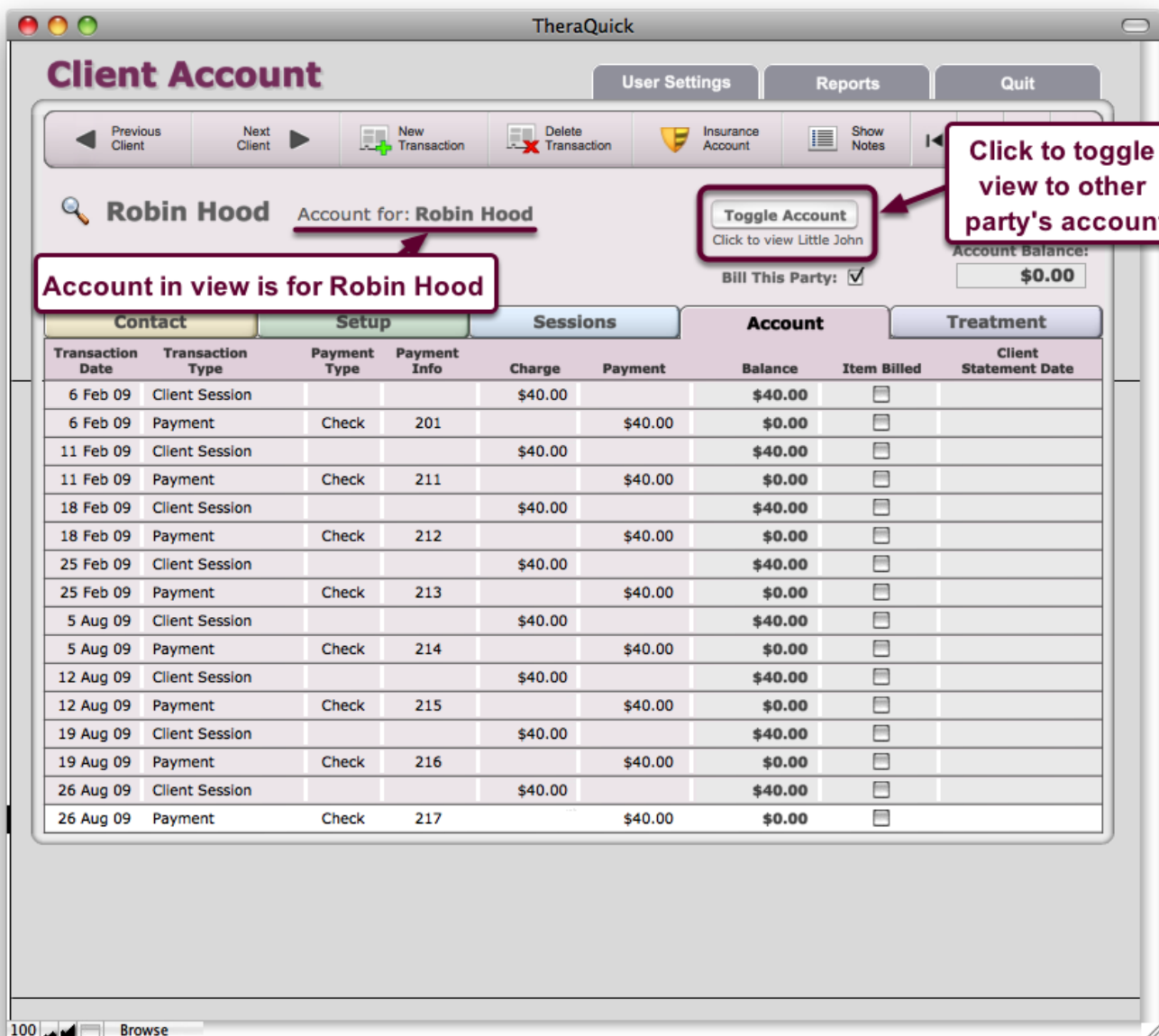
Fee Percentage: 40%
 Default Payment: \$40.00
 Default Payment Type: Check
 Optional: Credit Card Info

Fee Percentage: 60%
 Default Payment: \$60.00
 Default Payment Type: Check
 Optional: Credit Card Info

Enter the responsible party names in the form you would like them to appear on billing statements, and select their addresses from those entered for the different contacts. You can individually select whether each party will be included in batch billing. Select "Yes" for Bill This Party to include this party in batch billing. Enter the fee percentage for the first party as a decimal. In this example, we've entered .4 (40%) for the first party. The remaining amount is automatically calculated

for the second party (60%). Enter optional default payment amounts and types for each party for automated entry when creating charges and payments for client sessions.

When you create and charge the client sessions, a separate account will be maintained for each responsible party and charges for sessions will automatically be created according to the fee percentage for each party.



Client Account

Account for: **Robin Hood**

Toggle Account
Click to view Little John

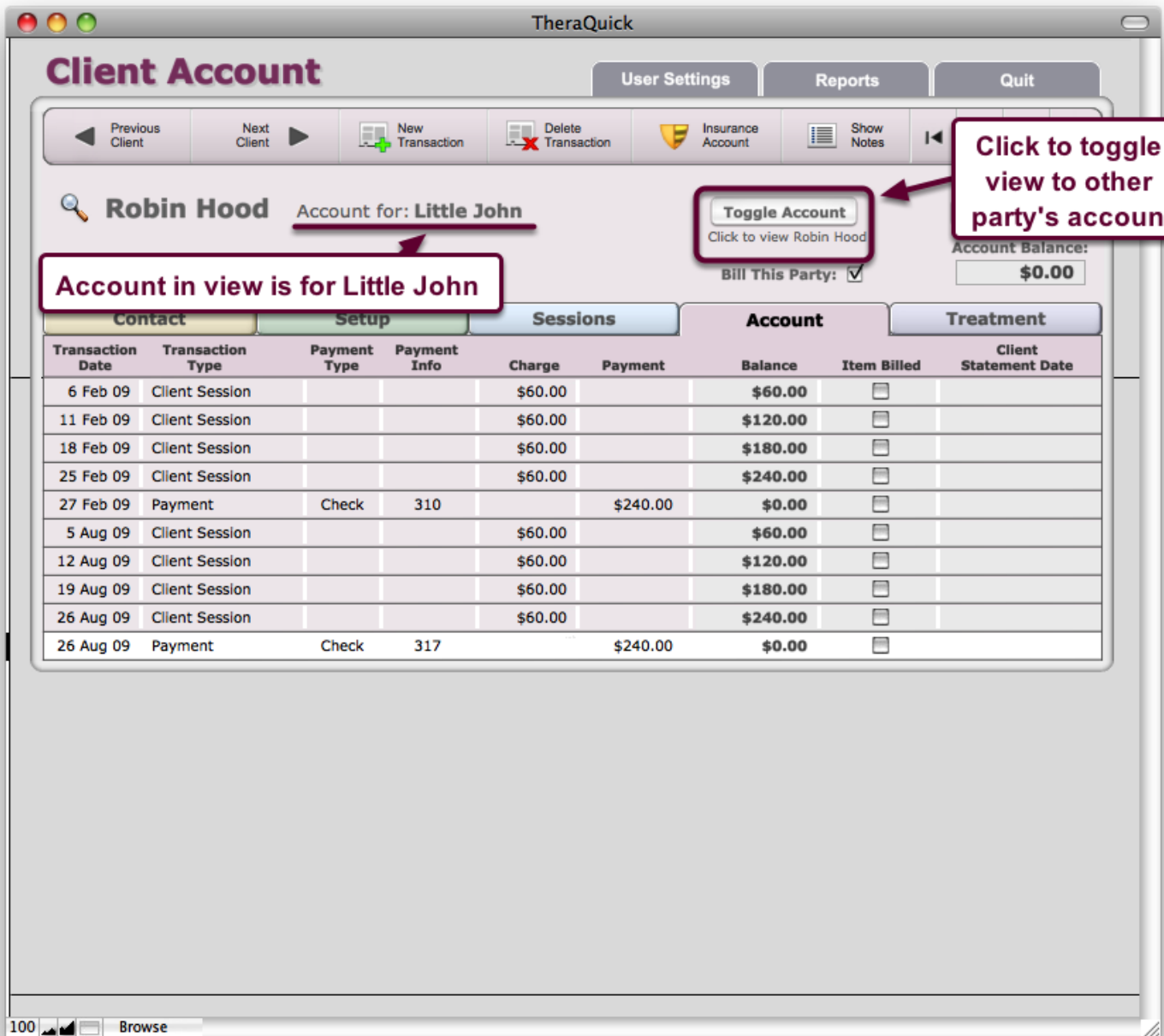
Account Balance: **\$0.00**

Transaction Date	Transaction Type	Payment Type	Payment Info	Charge	Payment	Balance	Item Billed	Client Statement Date
6 Feb 09	Client Session			\$40.00		\$40.00	<input type="checkbox"/>	
6 Feb 09	Payment	Check	201		\$40.00	\$0.00	<input type="checkbox"/>	
11 Feb 09	Client Session			\$40.00		\$40.00	<input type="checkbox"/>	
11 Feb 09	Payment	Check	211		\$40.00	\$0.00	<input type="checkbox"/>	
18 Feb 09	Client Session			\$40.00		\$40.00	<input type="checkbox"/>	
18 Feb 09	Payment	Check	212		\$40.00	\$0.00	<input type="checkbox"/>	
25 Feb 09	Client Session			\$40.00		\$40.00	<input type="checkbox"/>	
25 Feb 09	Payment	Check	213		\$40.00	\$0.00	<input type="checkbox"/>	
5 Aug 09	Client Session			\$40.00		\$40.00	<input type="checkbox"/>	
5 Aug 09	Payment	Check	214		\$40.00	\$0.00	<input type="checkbox"/>	
12 Aug 09	Client Session			\$40.00		\$40.00	<input type="checkbox"/>	
12 Aug 09	Payment	Check	215		\$40.00	\$0.00	<input type="checkbox"/>	
19 Aug 09	Client Session			\$40.00		\$40.00	<input type="checkbox"/>	
19 Aug 09	Payment	Check	216		\$40.00	\$0.00	<input type="checkbox"/>	
26 Aug 09	Client Session			\$40.00		\$40.00	<input type="checkbox"/>	
26 Aug 09	Payment	Check	217		\$40.00	\$0.00	<input type="checkbox"/>	

On the Client Account layout, a button labeled "Toggle Account" will appear to allow you to view the accounts for the two different responsible parties. In this example, we are viewing the account for Robin Hood, who is set up to be charged a 40% share of the \$100 Client Session Fee/Co-pay amount, and he pays in full at the time of each visit. (Note that the Client

is Robin Hood, independent of the choice of responsible parties.)

Click on "Toggle Account" to view the account for the other responsible party.



Client Account User Settings Reports Quit

Previous Client Next Client New Transaction Delete Transaction Insurance Account Show Notes

Robin Hood Account for: **Little John** **Toggle Account** (Click to view Robin Hood) Account Balance: **\$0.00**

Bill This Party:

Account in view is for Little John

Click to toggle view to other party's account

Contact		Setup		Sessions		Account		Treatment	
Transaction Date	Transaction Type	Payment Type	Payment Info	Charge	Payment	Balance	Item Billed	Client Statement Date	
6 Feb 09	Client Session			\$60.00		\$60.00	<input type="checkbox"/>		
11 Feb 09	Client Session			\$60.00		\$120.00	<input type="checkbox"/>		
18 Feb 09	Client Session			\$60.00		\$180.00	<input type="checkbox"/>		
25 Feb 09	Client Session			\$60.00		\$240.00	<input type="checkbox"/>		
27 Feb 09	Payment	Check	310		\$240.00	\$0.00	<input type="checkbox"/>		
5 Aug 09	Client Session			\$60.00		\$60.00	<input type="checkbox"/>		
12 Aug 09	Client Session			\$60.00		\$120.00	<input type="checkbox"/>		
19 Aug 09	Client Session			\$60.00		\$180.00	<input type="checkbox"/>		
26 Aug 09	Client Session			\$60.00		\$240.00	<input type="checkbox"/>		
26 Aug 09	Payment	Check	317		\$240.00	\$0.00	<input type="checkbox"/>		

Clicking on "Toggle Account" will show the account for the second party, Little John in this example. Little John has been charged 60% of the \$100 Client Session Fee/Co-pay amount, and has been paying off his balance by check near the end of the month. (Note that the Client is still Robin Hood, independent of the choice of responsible parties.)