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We’re here to help!

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I. Getting Started

LOGIN

1. Go to the PatientSERV website: www.patientserv.ca
2. Select Physician Login.
3. Enter your email address and password.
4. Click Log in
**Dashboard**

The Dashboard is the first screen you’ll see after logging in. It shows you an overview of patients in the system, as well as any outstanding notifications.

From here, everything is just a click away.

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**Tabs**

- **Notifications** ➔ Earn reward points by addressing outstanding payments and issues
- **Staff Management** ➔ View current staff members; activate or deactivate staff accounts
- **Patient Management** ➔ View all patients in the system; search for, add, or edit patients; enroll patients in plans; render services to patients
- **Reports** ➔ Create custom reports to view Pending Payments and Services Rendered
- **My Rewards** ➔ View and redeem your reward points
- **User Feedback** ➔ Help us improve the site – provide feedback, earn reward points!
II. Patient Management

**ADDING NEW PATIENTS**

In order to receive plans or services, patients must be entered into the PatientSERV system. The active patients we extracted from your EMR will be pre-loaded, but it’s always easy to add new patients as required.

1. Click the **Patient Management** tab.

2. Select **+ Add New Patient**.

   ![Patient Management Tab](image)

3. Enter patient information into profile.

   ![Add Patient Form](image)

   **TIP:** PatientSERV uses only the *numbers* for a patient’s Health #.

   You don’t need to add spaces, dashes, or the version code at the end when entering Health #’s.

4. Click **Save Patient** - You’re done!
**UPDATING PATIENT PROFILES**

If you need to change or add information to an existing patient in the system:

1. Click the **Patient Management** tab.

2. Search for patient by first or last name.

3. Click on the patient’s **Last Name** in the search results to open their profile page.

![Patient Management](image1)

4. Edit or add new information in profile.

![Edit Patient](image2)

5. Click **Save Patient** - You’re done!
**ADDING FAMILY MEMBERS**

If a patient wants to sign up for a Couple or Family plan, you must group together all included family members *before* proceeding with the plan enrollment.

1. Click the **Patient Management** tab.

2. Search for the family by last name. Ensure that all family members that will be included in the plan are shown in the search results. If not, add them to the system using the steps from **Adding New Patients** (pg. 5).

3. In the search results, click on the **Last Name** of the primary family member – that is, the person purchasing the plan on behalf of the family – to open their profile page.

4. Scroll down to the bottom of their profile page and click **Add New Family Member**. You will be taken to the Add Family Member screen.

5. Enter the Health Number of a family member and click **Submit**. The family member’s name will appear under ‘Result’.

6. Verify that the name shown is correct, then use the dropdown box to select the relation to the primary family member. Click **Add to Family**.

7. Repeat steps 5 & 6 until all family members have been added to the primary patient. Click **Back to Profile** - You’re ready to sign this family up for a plan!

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**TIP:** You will need to enter the Health Numbers of all family members in just a moment. Copying them from this screen can save you from looking them up again later.
III. Assigning Plans

A patient must have a plan selected in the system before you can render any services to him or her.

**PAY-AS-YOU-GO**

Pay-as-you-go means that the patient will pay for any uninsured services at the time of delivery. In order to sign a patient up for Pay-as-you-go:

1. Follow the steps of Updating Patient Profiles (pg. 6), to add or change any patient information (such as Email address) before proceeding with the plan selection.

! If there are other family members included in the plan, group them together now by following the steps of the last section, Adding Family Members (pg. 7).

2. Click on the Payment Info & Plan tab at the top of the patient’s profile page.

3. If the patient has provided a credit card, enter their card information here. (The CVV is not required.) Click Save Card to verify and save the card.

**TIP:** Saving a credit card for Pay-as-you-go patients will allow for quick, automated billing!

4. Use the dropdown box beside Next Plan to select “Pay-as-you-go”.

5. Click **Sign Up**

You will be taken to a confirmation screen to verify the details of the plan selection.

6. On the payment screen, choose Cash as the Payment Type. (Because the plan itself costs $0, you shouldn’t enter Cheque or Credit Card here). After verifying that the patient name and selected plan are correct, click **Confirm Purchase** - You’re done!
**ANNUAL FEE PLAN**

Annual Fee Plans provide yearly coverage for a list of services with a one-time payment.

1. Follow the steps of **Updating Patient Profiles** (pg. 6), to add or change any patient information (such as Email address) before proceeding with the plan selection. If there are other family members included in the plan, group them together now by following the steps of the previous section, **Adding Family Members** (pg. 7).

2. Click on the **Payment Info & Plan** tab at the top of the patient’s profile page.

3. If the patient is paying the annual fee by credit card, enter their card information here. (The CVV is not required.) Click Save Card to verify and save the card.

4. Use the dropdown box beside Next Plan to select “Annual Fee Plan”.

5. Click **Sign Up**

6. Check that the plan selected is correct, and ensure that the names of all intended patients (including family members) are shown.

7. Use the dropdown box to select Payment Type: Cash, Cheque, or Credit Card. (Credit card will only be available if you saved a card in Step 3.)

8. Click **Confirm Purchase** - You’re Done!
IV. Services and Payments

**Rendering a Service**

Billing patients and keeping track of services is quick and easy. Whenever an uninsured service is provided for a patient, follow these simple steps:

1. Click the **Patient Management** tab.

2. Search for the patient by first or last name.

3. Click the **Service** link beside the patient’s name in the search results.

4. This will open the patient’s service page. Using the dropdown boxes, select the service rendered and the performing physician.

5. Click **Proceed**

You will be taken to a confirmation screen to verify the details of the service.
6a. If the service is covered under the patient’s Annual Plan, you will see a green checkmark, and no payment information will be required. Click **Submit** - You’re done!

![Prescrip Refill By Phone/Fax is covered under patient’s plan.](image)

6b. If the service is *not* covered, or if the patient is enrolled as Pay-as-you-go, you will now be prompted to process the payment.

![Prescrip Refill by Phone/Fax is not covered under patient’s plan.](image)

7. Select the Payment Type. If the patient is paying by credit card, enter Card Type, Number, and Expiry Month/Year. (If the patient already has a credit card on file, it will show up here and you will not need to enter it again.) If known, enter patient email. ! If the patient is not available to pay at this moment, you can select Pending Payment as the payment method. See Processing a Pending Payment (pg. 12) for more information.

![Process Payment](image)

**TIP:** Use the Discount field to reduce the cost when needed. Always make sure the Total Due is what the doctor intends to charge before submitting. See Discounting Cost (pg. 13) for info.

8. Click **Submit** - You’re done!
**PROCESSING A PENDING PAYMENT**

A pending payment is created when the Payment Type of a rendered service is set to “Pending Payment”. This may be used when the patient is not available to pay immediately for the service. Note that charging a pending payment will generate an invoice that is automatically sent to the patient.

Here’s how to settle a pending payment if the patient comes into the office to pay:

1. Click the **Patient Management** tab.

2. Search for the patient by first or last name.

3. Click the **Service** link beside the patient’s name in the search results.

4. This will open the patient’s service page. Scroll down to the Pending Payments section.

   **TIP:** You can view and print invoices for any pending payment by clicking the Invoice link.

5. Click **Process Payment** to open up the payment screen.

6. Select the Payment Type. If the patient is paying by credit card, enter Card Type, Number, and Expiry Month/Year. (If the patient already has a credit card on file, it will show up here and you will not need to enter it again.) If known, enter patient email address – this will automatically send a receipt by email.

7. Click **Submit** - You’re done!
DISCOUNTING FEES

The prices of plans and services are pre-set in PatientSERV based on the current rates charged in your practice. However, there may be situations when you want to discount or completely waive the payment for either an Annual Fee Plan or an individual service:

➢ To provide a complimentary plan for a friend, colleague, or special case
➢ To waive a service fee for any reason
➢ To set the price for any service that has a “variable” rate (e.g., a form written for a patient may cost more or less based on its length and complexity)

Whether the case, the procedure for discounting is always the same:

1. Proceed with any transaction until the Process Payment screen.

![Process Payment Screen]

2a. Enter a dollar amount in the Discount field, then click the ☺ button beside $. The dollar amount entered will be subtracted from the default fee displayed.

-OR-

2b. Enter a percentage in the Discount field, then click the ☺ button beside %. The total fee will be discounted by the percentage entered. (e.g., $200 Plan, 75% Discount = $50)

3. Always check that the Total Due at the very bottom updates to the desired amount after entering a discount. If everything looks good, click [Submit] to finish – You’re Done!
VIEWING PAST SERVICES

If you want to view a history of services received by a patient, or if a patient has requested a printed receipt for any payment of plans or services, you can easily do so on the patient’s service screen.

1. Click the **Patient Management** tab.

2. Search for patient by first or last name.

3. Click the **Service** link beside the patient’s name in the search results.

4. This will open the patient’s service page. Scroll to the bottom to see Past Services.

5. Click the **Receipt** link to view a receipt for any plans or services purchased. You will see the **Print** button after opening the receipt.

You’re done!

**TIP:** This is also where you can issue refunds. Click the **Refund** button beside any past service and follow the steps on the refund page to issue a full or partial refund to the patient.
V. Staff Rewards

EARNING POINTS

PatientSERV aims to recognize the hard work you do in maintaining a well-managed uninsured services program. Staff members can earn reward points by performing a number of everyday tasks, which can be redeemed for gift cards:

- Earn 1 point every day for logging in!
- Earn 1 point when you add an email address to a patient’s profile!
- Earn 1 point when you save a credit card to a patient’s profile!
- Earn 1 point by suggesting improvements through the User Feedback tab!

In addition to the above, you can earn 1 point for every 10 dollars of payments you enter into the system. For example:

- Processing a $20 prescription refill will earn you 2 points!
- Processing a $100 Annual Fee Plan will earn you 10 points!
- Processing a $250 Family Plan will earn you 25 points!

Here’s an easy way to earn more points while helping to manage outstanding payments and other issues:

1. Click the Notifications tab. This will show you a list of patients with notifications. Notifications include overdue pending payments, credit cards approaching expiry, Annual Fee Plans approaching expiry, and more.

2. Click the patient’s Last Name to open their profile and address the issue.

Every patient presents an opportunity to earn rewards!
REDEEMING POINTS

To redeem your reward points:

1. Click the **My Rewards** tab. On the Rewards page, click the **Redeem My Points** link. This opens the redemption page, which displays the variety of gift cards available:

![Redemption Page]

2. Fill out all required fields and click **Send** to submit your request. A PatientSERV staff member will follow up with you shortly!
VI. Frequently Asked Questions

1. Can notes be written in the system?

Yes, there are two locations where you can save notes.

a. The ‘Notes’ box when rendering a service to patient:

![Service Details](image)

Use this box for any note specific to the service being rendered, i.e., extra clarification about what the service was, who did it, when, etc.

Notes saved in this box can be seen by patients, and they appear on the patient receipt when printed.

b. The ‘Confidential Notes’ in patient profile:

![Edit Patient](image)

Use the Confidential Notes box for any additional general information you would want to save to a patient’s profile.

Notes in this box cannot be seen by patients, only by doctors and staff.
2. How can I check if a patient has a plan?

The patient’s plan status can be viewed on their service page. Search for a patient, then click on Service beside their last name. You will find their plan status at the bottom of the ‘Patient Profile’ section.

3. Should I record services even if a patient is covered by an annual plan?

Entering every service into the system allows doctors to keep track of the entirety of their uninsured services activity, which is important even when a patient has a plan. It also allows for patients to maintain a full record of their history, which is accessible through the patient login.

4. Can you change the date when a service was rendered?

Services cannot be backdated, but you can leave a note in the 'Notes' box when rendering the service to indicate the actual date the service was rendered. This information will show on the receipt.

6. Why should emails be collected whenever possible?

Email addresses help to automate PatientSERV by reducing the costs and time involved in sending invoices, receipts, and other communications to patients.

7. How do I remove a patient from PatientSERV?

If a patient has moved, deceased, or changed doctors, you may wish to remove them from the PatientSERV system. To remove a patient, open a patient’s profile page and change both their first name and last name to Remove. (The patient’s name should now be Remove Remove.) Be sure to save this change. These patients will be removed automatically from the system.

Thank you for choosing PatientSERV.

If you need any further assistance, please don’t hesitate to contact us.

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