Contents

Patient Portal Home Screen

When a patient navigates to their portal home screen, they have two options to take action on their account:

- Make a **one-time payment:** Allows user payment access only.
- Become a **Registered User:** Allows user access to all of the functionality.

Making a One-Time Payment

For patients that do not wish to register an account, but simply make a one-time payment, they would take the following steps:

1. From the portal home page, click on **one-time payment.**

Don't have an account?

Register now

Register via code

Make a one time payment
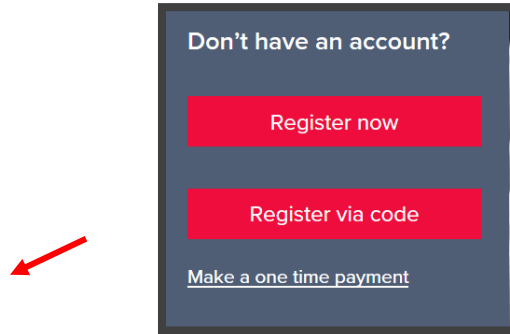
2. Enter the Account #, Invoice #, Last name, and Phone #.

   Note: The information can be located on the invoice or statement received. These are the **REQUIRED** Fields.

Make One Time Payment

Patient Information
All fields are required

Account #

Last name

Email (Optional)

Invoice #

Phone #

Confirm email address

Next

Note: Hovering over the question mark icon will instruct where these identifiers can be located on an invoice.

3. Select the red Next icon.

   Note: The next icon will appear in grey if required information is missing. The user cannot proceed until the information is entered.

4. Confirm information and select ok.
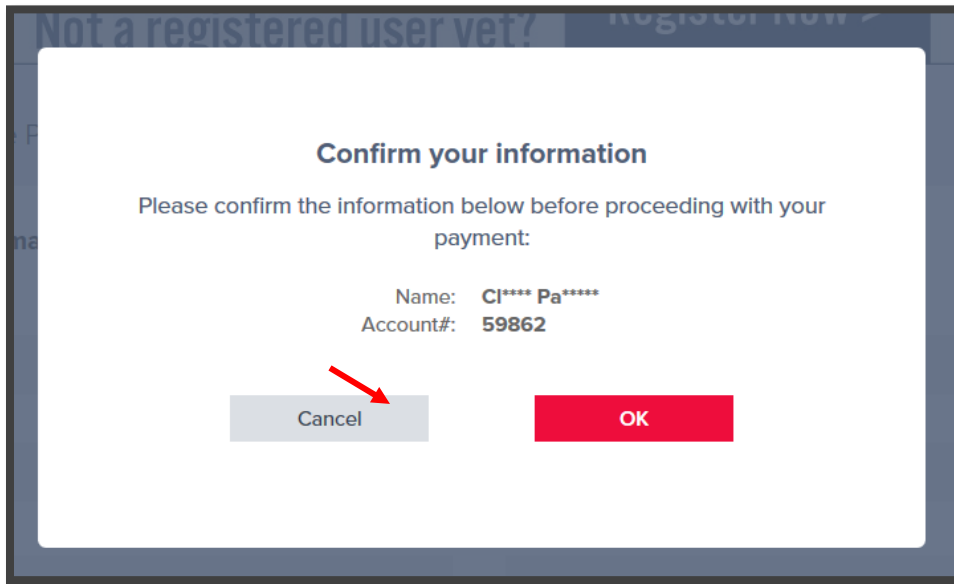
5. Invoices with a balance due will display in the Overview page.

6. When making a one-time payment, the **Make Payment** action is the only available option.
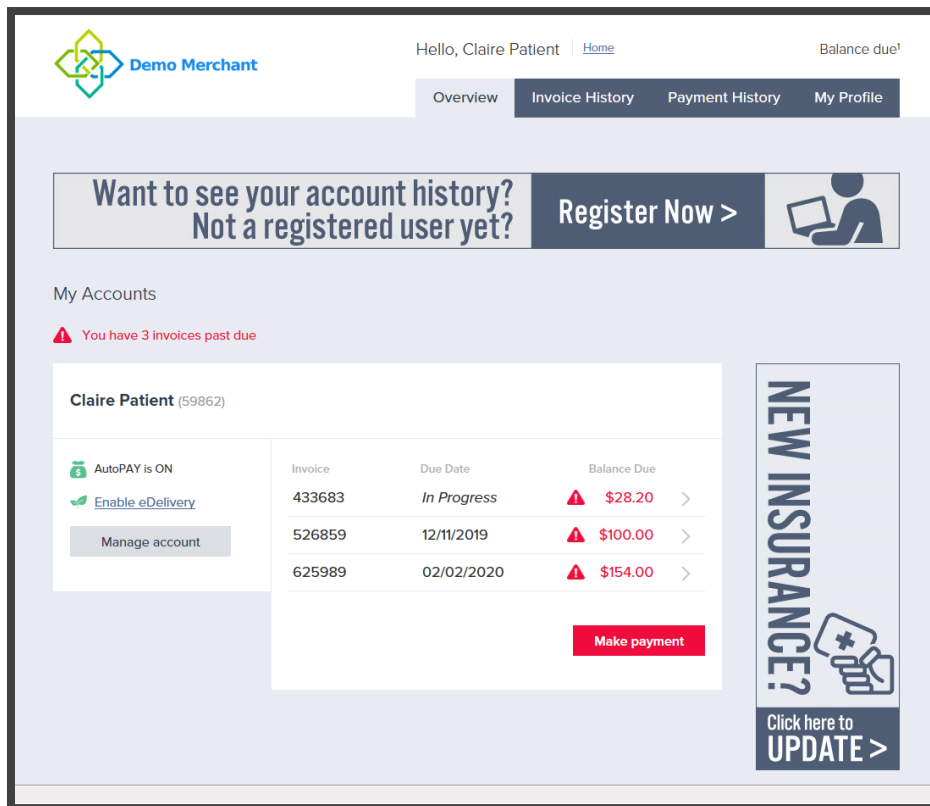
Note: Selecting anything except Make Payment will result in the below message. Selecting CANCEL will navigate back to the Overview Screen. Selecting PROCEED will navigate the patient back to the Patient Portal Login Page to access the Register Account option.

Kindly login to access this feature

CANCEL   PROCEED
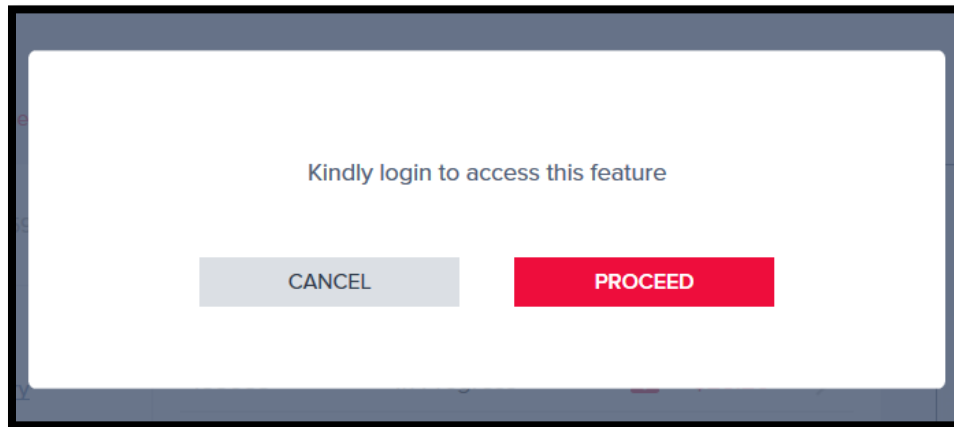
7. After selecting Make Payment, the payment screen will appear.

8. Select the invoices to be paid and payment method (check or credit card).

9. Enter the billing information for the payment method.

10. Select the red **Next** icon.
    Note: The next icon will appear in grey if required information is missing. The user cannot proceed until the information is entered.

11. Verify the information entered is correct. Select the red **Next** icon.

12. Enter the credit card information including card number, expiration date, and CVV code. Click **Submit Transaction** once all information is entered.

    Note: For security reasons, the screen to enter card information is only available for a set amount of time. The remaining time will display in the top left corner of the form.

13. If the transaction is successful, messaging will appear along with payment information.

Becoming a Registered User

As a Registered User, the patient is able to view invoices, save payment methods, make payments, view payment history as well as manage account settings such as AutoPAY and eDelivery.

There are several options present on the portal home screen to start registration:

1. Register Now

2. Register via code (if applicable/obtained from provider)
3. Create Account
4. Register Now banner
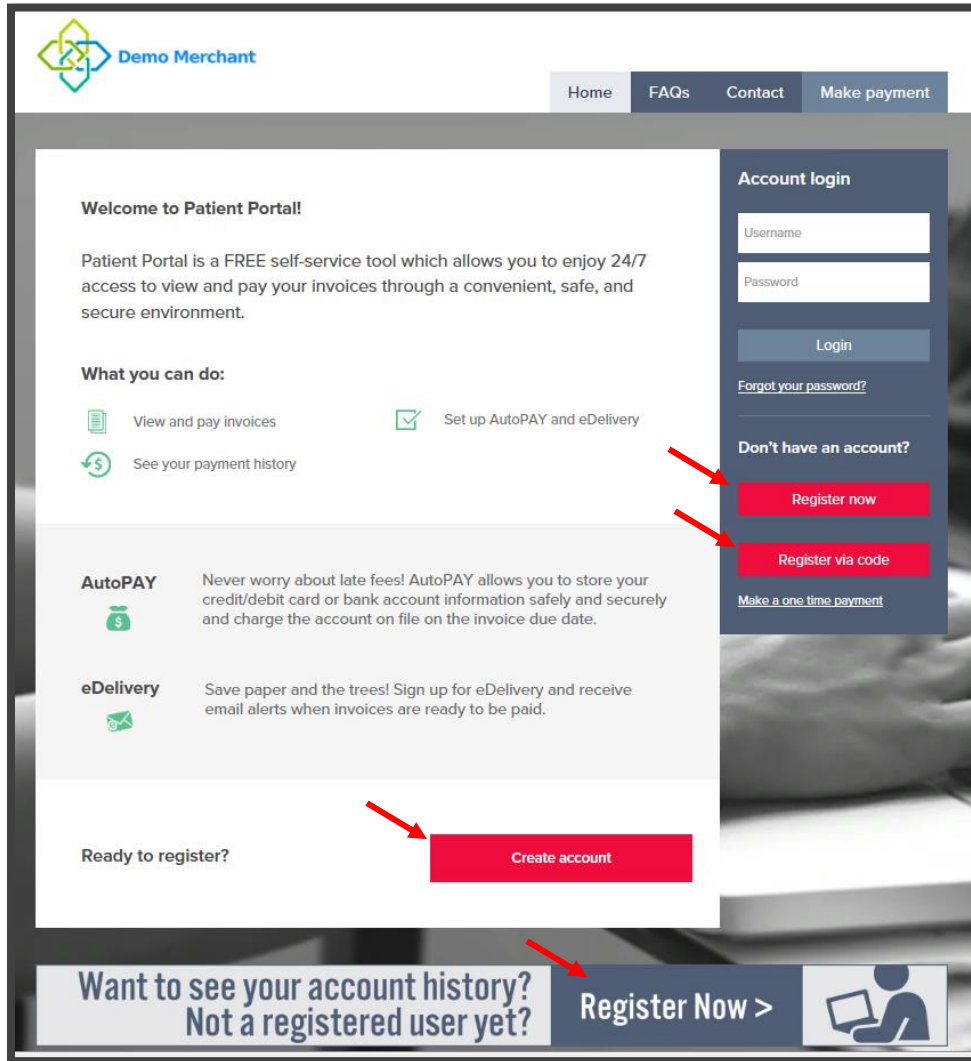
5. After selecting the registration option, enter the necessary information in the Register screen.

   Note: All fields are required. The email populated in this area will be used as the username for the Account login.

6. Click Continue Registration Process .

7. An email will be sent to the email address provided for verification purposes.

8. Once the email has been received, select **CONFIRM EMAIL**.

   Note: The confirmation email link will expire after 24 hours. The email will be sent within a few minutes after selecting Continued Registration Process. If not received, check junk or spam.
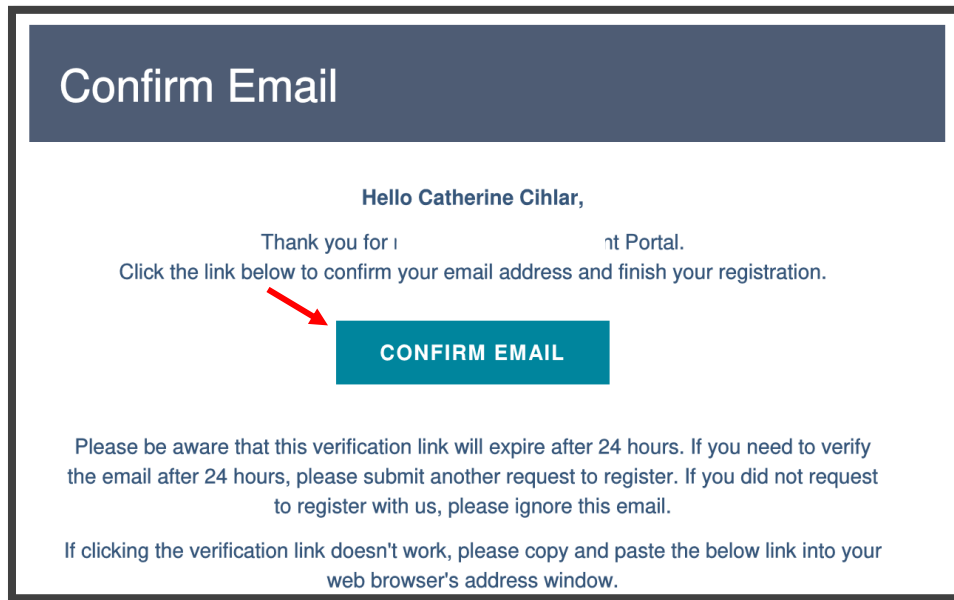
9. The patient will be directed to the portal and the Create Profile option.

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Create Profile

| ① Create user profile | All fields are required | ② Add patient account | ③ Summary |

First name

Kelly

Last name

Patient

Email address

nicole.cihlar@hotmail.com

Phone #

Choose Password

Confirm Password

Password criteria

⚠ Must be at least 8 characters long.

⚠ Must contain at least 1 upper-case letter.

⚠ Must contain at least 1 lower-case letter.

⚠ Must contain at least 1 number.

⚠ New Password and Confirm Password fields must match.
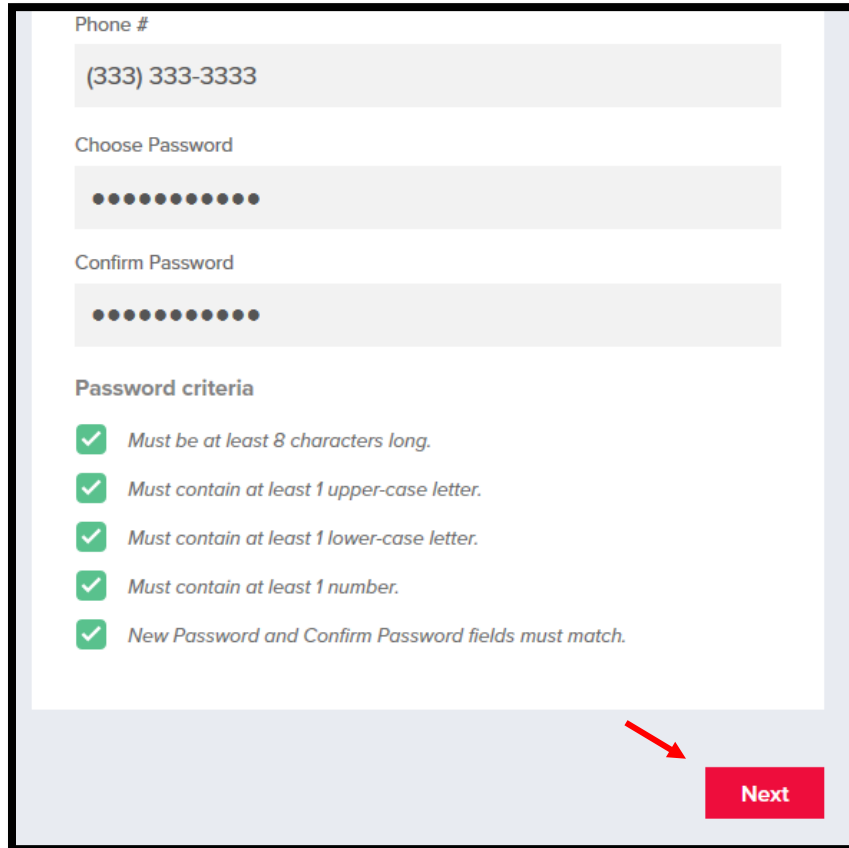
10. Enter all necessary information.

   Note: All fields are required.

11. After all information has been entered, a green check box will appear next to each line item of the Password criteria if all criteria are met.

12. Select the **Next** icon.

13. From the **Add patient account** screen, enter all necessary information.

   Note: The account and invoice number are required.

14. Once populated, select **Complete Registration**.

   Note: This step is NOT required when using **Register via code**.

15. The **Summary** screen will appear indicating registration is complete.

16. Select **Go to My Account**.

Create Profile

✓ Create user profile   ✓ Add patient account   3 Summary

Registration is complete.

You are now ready to manage your invoices and payments in one place.

Patient account associated with your user profile:

Kelly Patient
Account #: 15687

Go to My Account
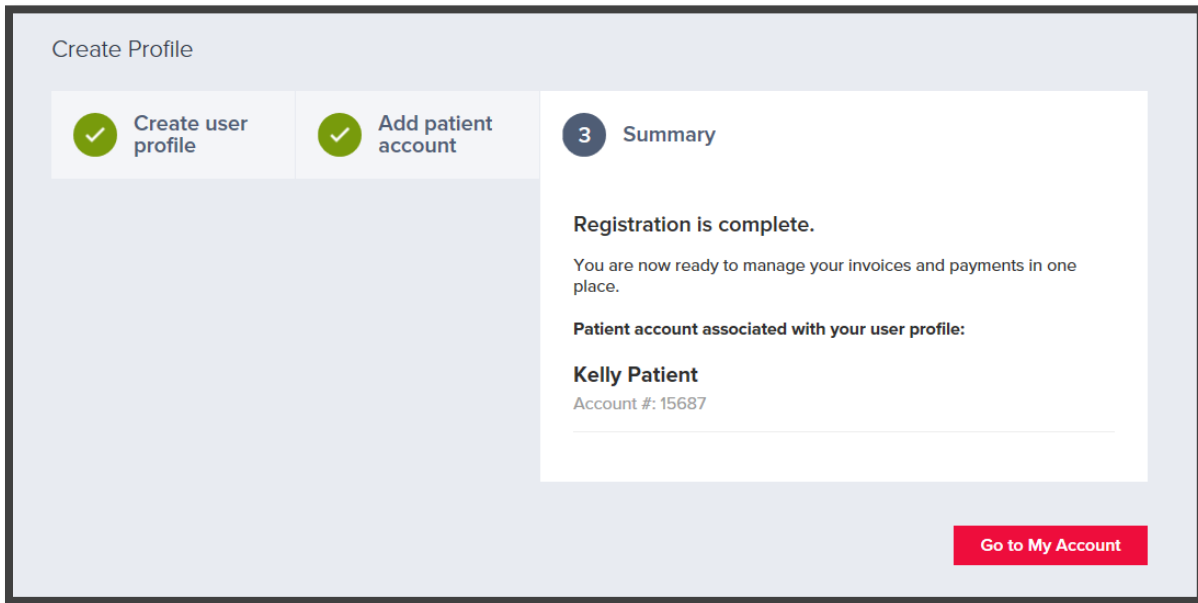
Registered User Login

1. To log into the Patient Portal after registration, navigate to the same hmebillpay site.

2. Under Account login, enter the email used to register in the Username field and the Password entered when registering.

Account login

Username

Password

Login

3. The patient will be directed to their account with registered user options.

Registered User Options

As a Registered User, the patient is able to view invoices, save payment methods, make payments, view payment history and manage account settings such as AutoPAY and eDelivery.

Upon login, the portal will default to the **Overview** tab.
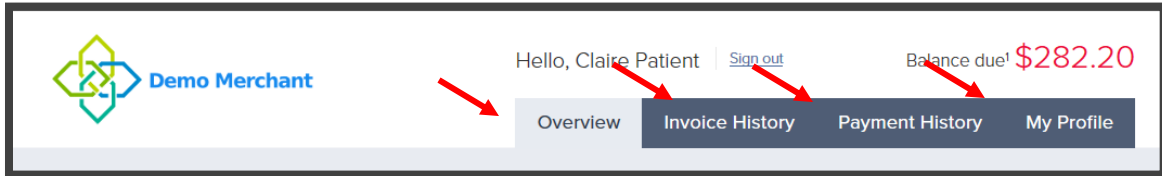
On the **Overview** tab, the user will see options to:

- Make a payment
- Setup AutoPAY
- Enable eDelivery
- Manage their account
- Provide updated insurance information

Additional tabs can be selected at the top of the screen:

- Invoice History
- Payment History
- My Profile

Overview tab – Setup AutoPAY

Registered users have the option to Setup AutoPAY on their account.

1. After logging into the registered account, select the **Setup AutoPAY** hyper link on the left of the Overview page.
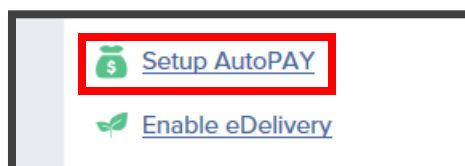
2. The user is directed to the **My Profile** tab.

3. If there is an email on the patient account in the AR Dashboard, it will be listed here. If no email is on file in the AR Dashboard, the fields will be empty and require information to be entered.

   Note: This is NOT the user profile email. Email and phone number are required fields. This email will be the recipient of the Welcome to AutoPAY email along with all AutoPAY receipts after payment.

4. Select the AutoPAY indicator. Once selected it will turn from gray to red.

5. After any field has been updated, the Save changes option will turn from gray to red and be available for selection.
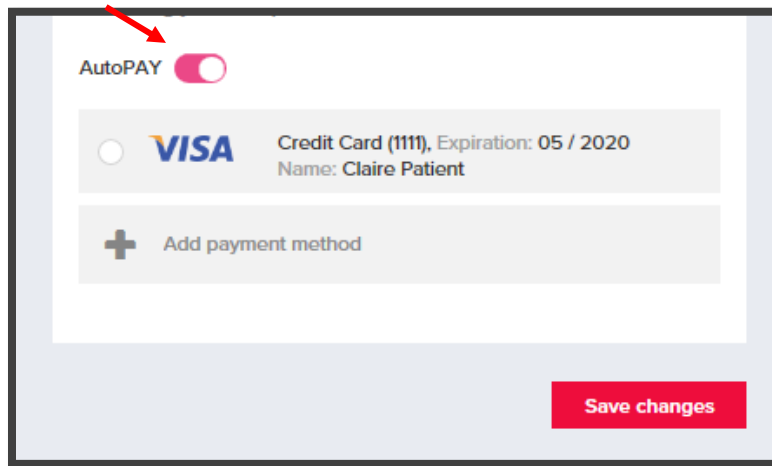
6. If there is a payment method on file, it will display when the AutoPAY indicator is selected.

7. Select either the payment method on file or the Add Payment Method option.

   a. If selecting Add Payment, follow the prompts until the Payment methods has been added.
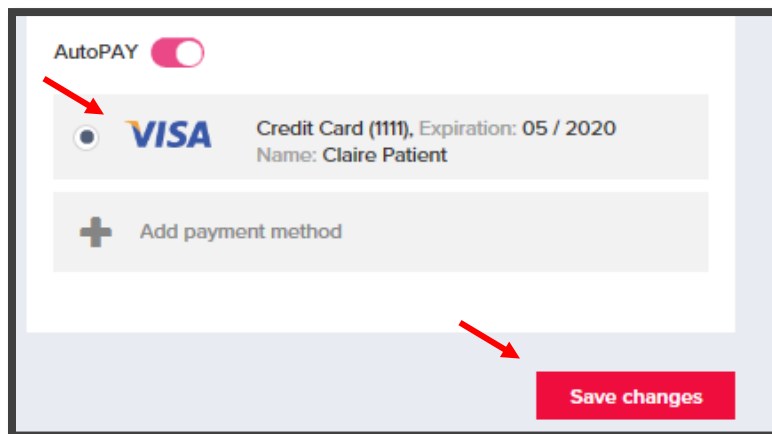
8. Select the desired method of payment for processing AutoPAY and select "Save changes".

9. Review the Opt-In screen which provides a detailed explanation of AutoPAY, and select Accept.
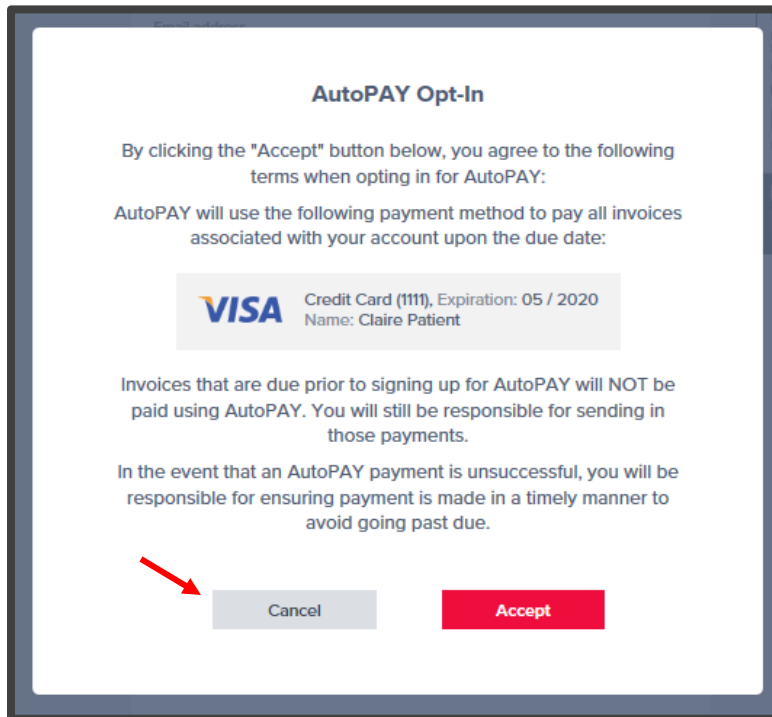
10. A message confirm the changes have been successfully saved will flash on the screen.
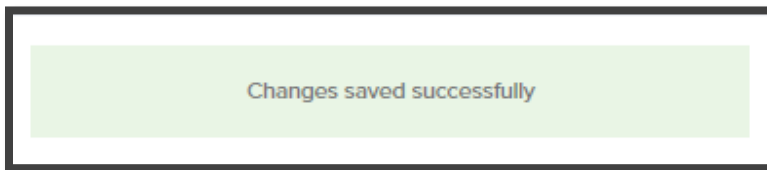
11. The Welcome to AutoPAY email will be sent to the email listed.

Welcome to AutoPAY

Hello,

Thank you for signing up for AutoPAY with Demo Merchant1.

With AutoPAY, you can be confident your invoices will be paid on the date they're due using the payment method you provide.

Demo Merchant1
Contact Customer

If you have any questions regarding your account, please contact us at:.
(913) 222-3333

Please log in to your account at _Demo Merchant1_ in order to:

- *Manage your AutoPAY settings*
- *Access invoice information*
- *View your account status*
- *Review your payment history*
- *Update your contact information*

Overview Tab – Setup eDelivery

1. After logging into the registered account, select the Enable eDelivery hyper link on the left of the Overview page.

Setup AutoPAY

Enable eDelivery
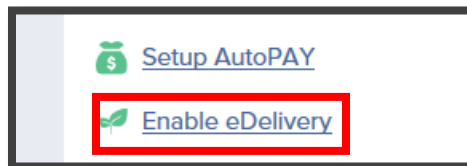
2. The user will be directed to the My Profile tab.

3. Navigate to the **Delivery Method** section.

Note: Paper Delivery is always the default setting.

4. If there is an email on the patient account in the AR Dashboard, it will be listed here. If no email is on file in the AR Dashboard, the fields will be empty and require information to be entered.

   Note: This is NOT the user profile email. Email and phone number are required fields. This email will be the recipient of the eDelivery notifications.

5. Select Electronic delivery. **Don't for get to uncheck Paper delivery!**

6. After any field has been updated, the Save changes option will turn from gray to red and be available for selection.

Delivery Method

eDelivery eliminates paper waste by electronically notifying you when an invoice is available.

☐ Paper delivery   ☑ Electronic delivery

AutoPAY settings

A detailed notification email will be sent after every AutoPAY payment containing your receipt information.

AutoPAY 🔘

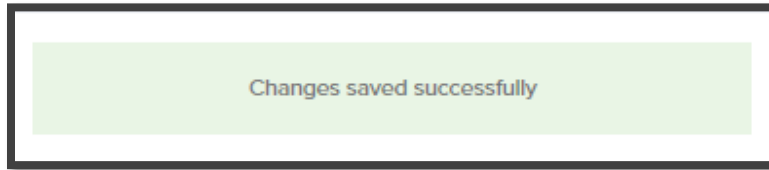⦿ **VISA**   Credit Card (1111), Expiration: 05 / 2020
Name: Claire Patient

➕ Add payment method

Save changes

7. Select Save Changes. A message confirming the changes have been successfully saved will flash on the screen.

Changes saved successfully

Overview Tab – Make a payment

1. After logging into the registered account, select the red Make Payment icon in the middle of the page.

   Note: The Make payment icon is not available if no balance is due.
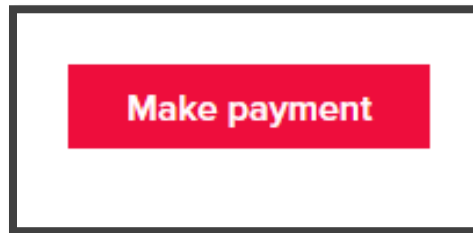
Make payment

2. From the **Payment** screen, all open invoices available for payment will be displayed.

3. **Step 1 – Open invoice(s):** Check the box next to the invoice(s) to be paid.

   Note: If making a partial payment, select the hyper link "If you wish to pay partial amount click here>".

   Note: If there is an asterisk next to the Balance due, it indicates a payment has been made against the invoice, but the invoice is not yet paid off or closed in the billing system.

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4. If taking a payment against the asterisk invoice, a warning message will appear.

5. **Step 2 – Select method of payment:** Select a payment method already on file or "Other method of payment" to enter an alternate payment method.

6. After selecting the payment method, the **Next** button will change from gray to red and be available for selection.

7. When a saved payment method on file is selected the verification screen will appear once Next is selected. If Other method of payment is selected follow the prompts until the verification screen appears.

a. Select Edit to be taken back to the overview screen to change the invoice, payment amount, or payment method.

b. Select Next to process the payment.

8. The final payment screen will allow the option to Save/print receipt or navigate to the Payment History tab.

Overview Tab – View Invoices

1. Open invoices will display on the Overview tab.

   a. If there are any invoices in a payment plan, a message will display below My Accounts.

   b. Any invoices attached to the payment plan will have the calendar icon next to them and will reflect a due date of *InProgress*.

c. If AutoPAY will be processing on the invoice in the invoice in the next 24 hours, the Due Date will reflect *InProgress*.

d. If the invoices are Past Due a message will appear below My Accounts on the Overview tab.

2. To view the invoice details, select the line item of the invoice.

a. Once the Invoice Details page opens, the date of service, item/service provided, and amount owed will display.

Invoice #433683 Details

Claire Patient
59862

From:
Demo Merchant
180 Circle Drive
Overland Park Kansas
66204

Item/service provided

Invoice #:   433683

Service date	Item/Service provided	Amount
11/21/2019	E0185 MATTRESS OVERLAY GEL FOAM	$38.20

This is only a summary of the invoice.
Please download printable version for full information.

Download printable invoice

Amount: **$38.20**
Due date: 12/13/2019
Status: Open

Back

Make payment

b. To view the invoice in paper form or print the invoice, select Download printable invoice.
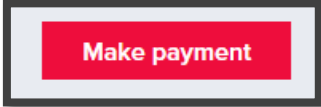
Invoice #433683 Details

Claire Patient
59862

From:
Demo Merchant
180 Circle Drive
Overland Park Kansas
66204

Item/service provided

Invoice #:   433683

Service date	Item/Service provided	Amount
11/21/2019	E0185 MATTRESS OVERLAY GEL FOAM	$38.20

This is only a summary of the invoice.
Please download printable version for full information.

Download printable invoice

Amount: **$38.20**
Due date: 12/13/2019
Status: Open
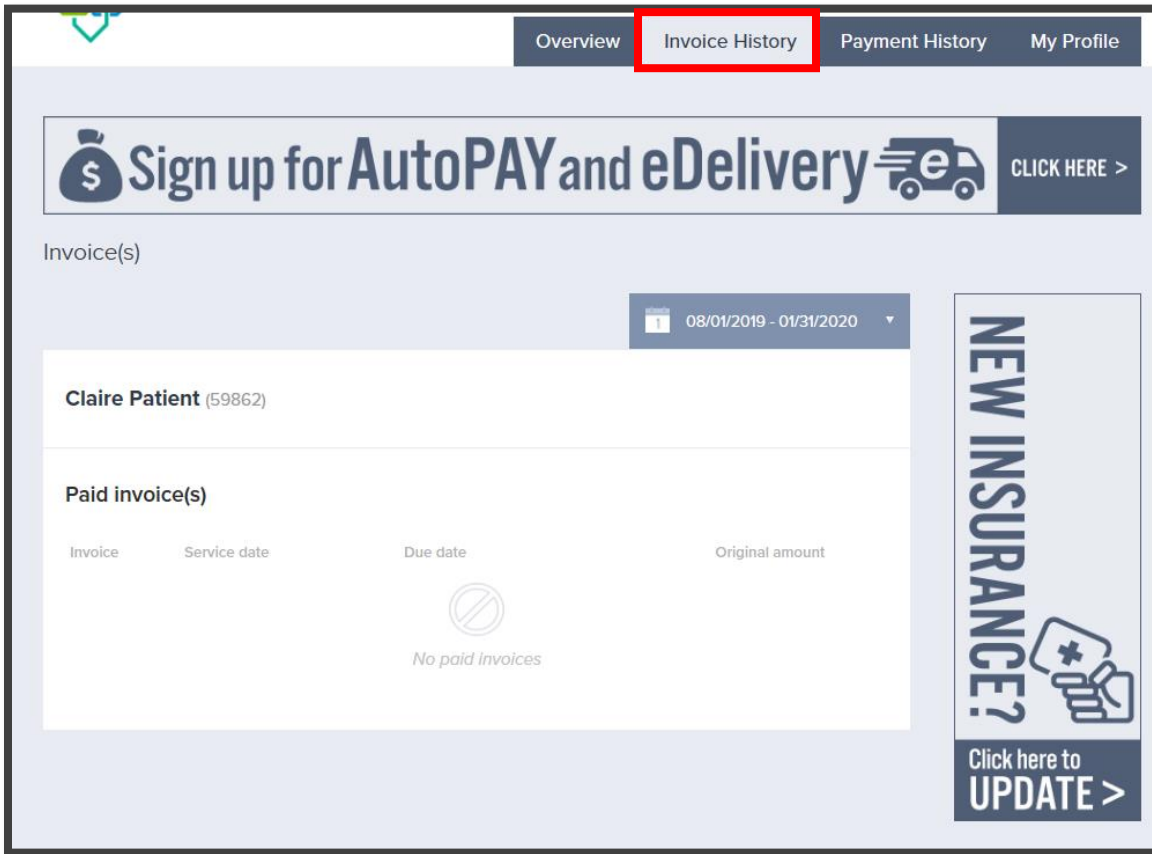
Back

Make payment

Make payment

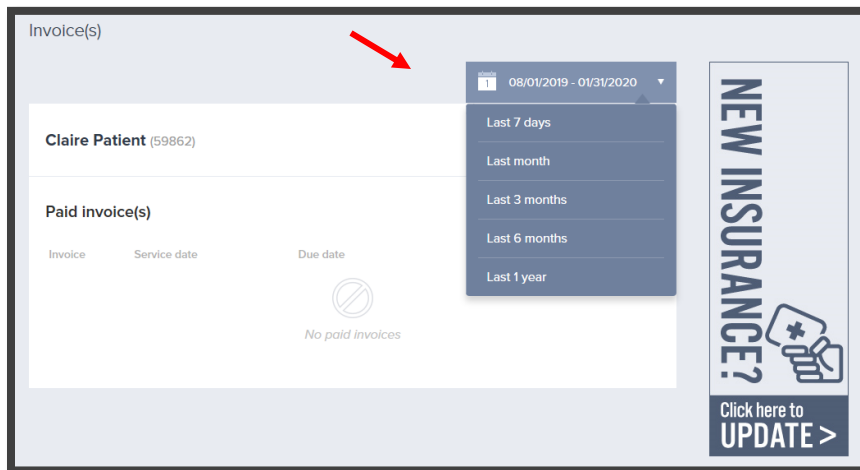3. To make a payments invoice details screen, select _____ .

Invoice History

1. After logging into the registered account, the **Invoice History** tab will provide information regarding invoices previously paid.

2. The date range can be changed by selecting the drop-down arrow.

3. When/If invoices are present, details can be accessed by selecting the line item.

Paid invoice(s)

Invoice	Service date	Due date	Original amount	
433722	11/19/2019	11/19/2019	$579.48	>
526898	12/23/2019	12/23/2019	$40.25	>
626028	12/07/2019	12/07/2019	$63.12	>

4. Details of Service date, Item/Service provided and amount are all present. To view the invoice in paper form or print the invoice, select Download printable invoice.

Item/service provided   Invoice #: 433722

Service date	Item/Service provided	Amount
11/19/2019	OXYGEN CONTENTS - E CYLINDER	$579.48

This is only a summary of the invoice.
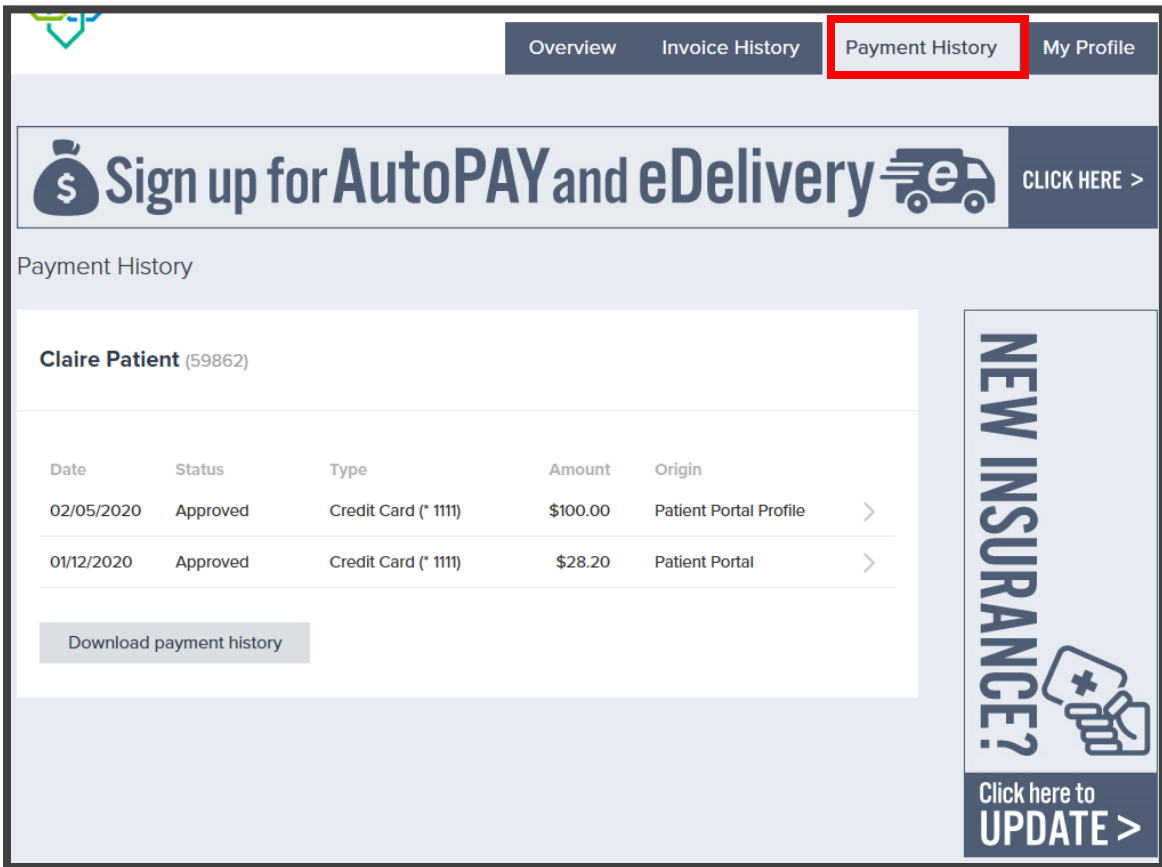Please download printable version for full information.

Amount: **$579.48**
Due date: 12/11/2019
Status: Paid

Download printable invoice

Back

Payment History

1. After logging into the registered account, the **Payment History** tab will provide information regarding payment previously made on the account.

2. The full payment history can be downloaded from this screen.

3. Selecting the line item will allow for a receipt of payment to be visible.
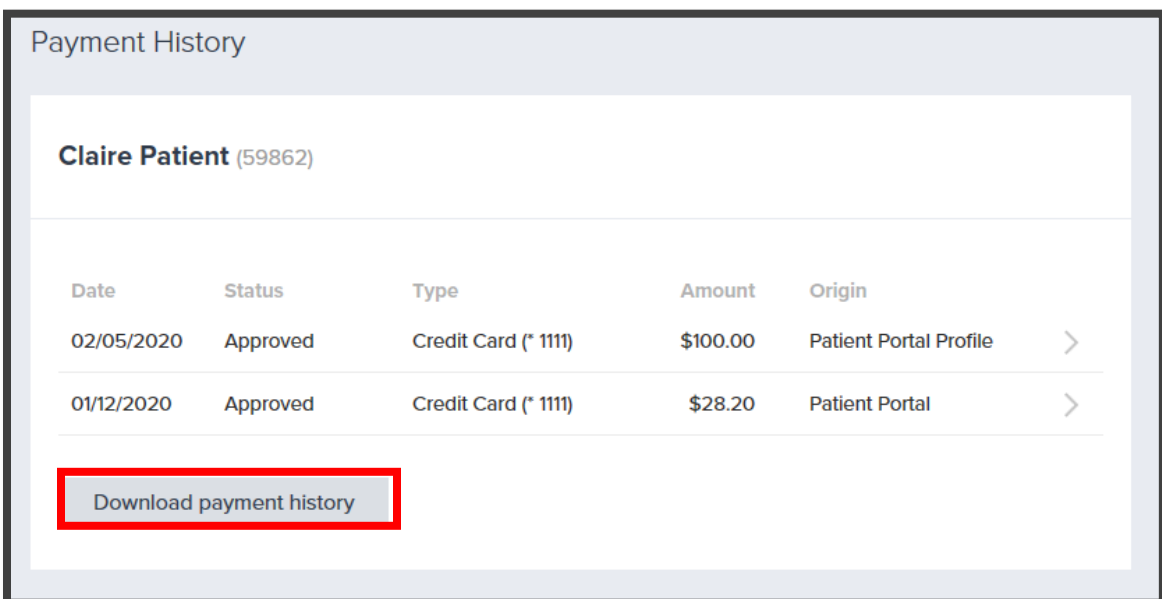
Payment History

Claire Patient (59862)

Date	Status	Type	Amount	Origin	
02/05/2020	Approved	Credit Card (* 1111)	$100.00	Patient Portal Profile	>
01/12/2020	Approved	Credit Card (* 1111)	$28.20	Patient Portal	>

Download payment history

4. Selecting Save/print receipt is available for each transaction receipt.

Transaction #37573229 Summary

Claire Patient
59862

Invoice(s)

Invoice	Due date	Original amount	Payment
526859	12/11/2019	$125.00	$100.00

Total amount paid: **$100.00**

Payment information

Status	***Approved***
Date	Feb 05, 2020, 09:34 AM
Reference #	PO202002051034594461
Transaction ID	37573229
Credit card	Visa Credit ********1111
Name on the card	Claire Patient
Billing address	C/O Bryant Nursing Home
Billing zip code	66204
Payment made to	Bpc, P.O. Box 740751 Los Angeles, CA, 90074-0670

Save/print receipt

My Profile

The following options will appear under the **My Profile** tab:

My Profile Tab - Patient account

1. The default page of the **My Profile** screen is the Patient account tab.

   a. The Patient details contain the email address on file for email notifications and can be updated here.

b. Delivery method pertains to how information is sent for billing.
   Note: See the Overview tab for directions to change the Delivery method.

c. AutoPAY settings indicate if AutoPAY is on or off for a patient and what payment method attached to AutoPAY processing.
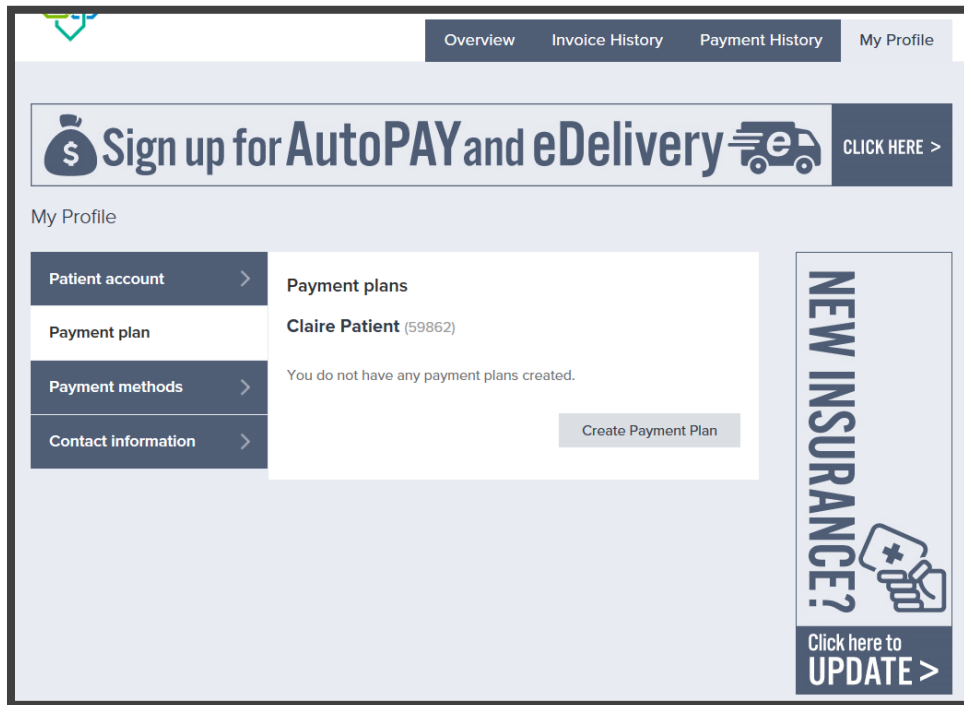   **Note:** See Overview tab information for directions to change AutoPAY settings.

My Profile Tab - Payment plan

The registered user has the ability to set-up a payment plan through the portal, if the feature is enabled by the provider.

1. To setup a Payment plan:

    a. Select Create Payment Plan.
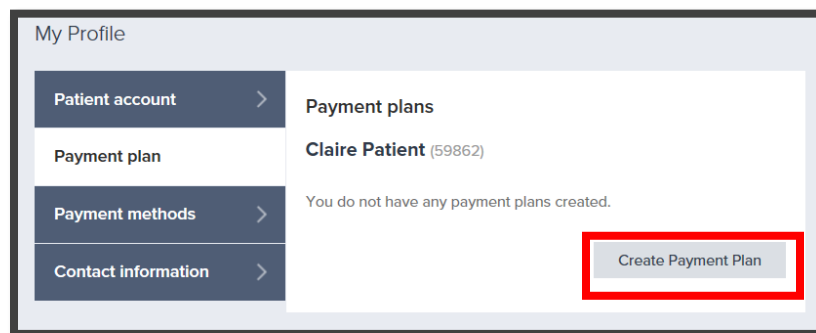
b. **Select Invoices:** Select the invoices to be added to the payment plan and click Next.

c. **Set Payment Schedule:** The Payment plan terms set by the provider will appear as your Payment options. Select the desired option, date and click Next.

d. **Payment Schedule:** The payment schedule will automatically calculate and appear. Confirm the Payment schedule by selecting Next.

Payment Schedule

Date	Amount
02/06/2020	$141.10
03/06/2020	$141.10

Next

e. Select an existing saved payment method or follow the prompts to add a new payment method and select Next.

Select Payment Method

VISA   Credit Card (*1111), Expiration: 05/2020
Name: Claire Patient

◯ Other method of payment

Next

f. Once the confirmation page populates, check the box to agree to the payment plan terms and select confirm.

Confirmation

Thank you for setting up a payment plan to be applied to your outstanding invoices totaling $282.20

Your first payment will be charged to ***1111 on 02/06/2020.

The schedule payment(s) will be charged on the 6 of each month*.

Payment plan confirmation email will be sent to **ncihlar@brightree.com**

☑ I agree to the terms of this payment plan.

* Months without this day will process payments on the last day of the month.

Confirm

g. The Payment Plan tab will now contain the payment plan specifics. A payment confirmation email will be sent with a receipt each time the payment plan processes a payment.

My Profile

Patient account	>
Payment plan	
Payment methods	>
Contact information	>

Payment plans

Claire Patient (59862)

Payment Plan details CURRENT

Monthly Amount	$141.10
Next Payment Date	03/06/2020
Current Amount	$282.20
Original Amount	$342.20
Payoff Date	03/06/2020
Payment Method	***1111 VISA

*To make changes to the terms of this payment plan, contact our office at : (913) 222-3333*

¹ Balance Due is the total amount of all open or unpaid invoices and does not reflect recent purchases or pending payments.
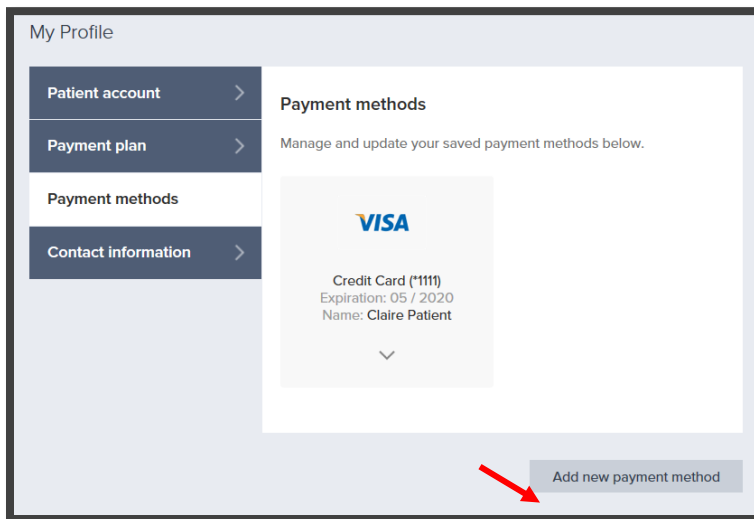
My Profile Tab - Payment methods

The Payment methods tab will house information pertaining to any payment method on saved on file with the provider.
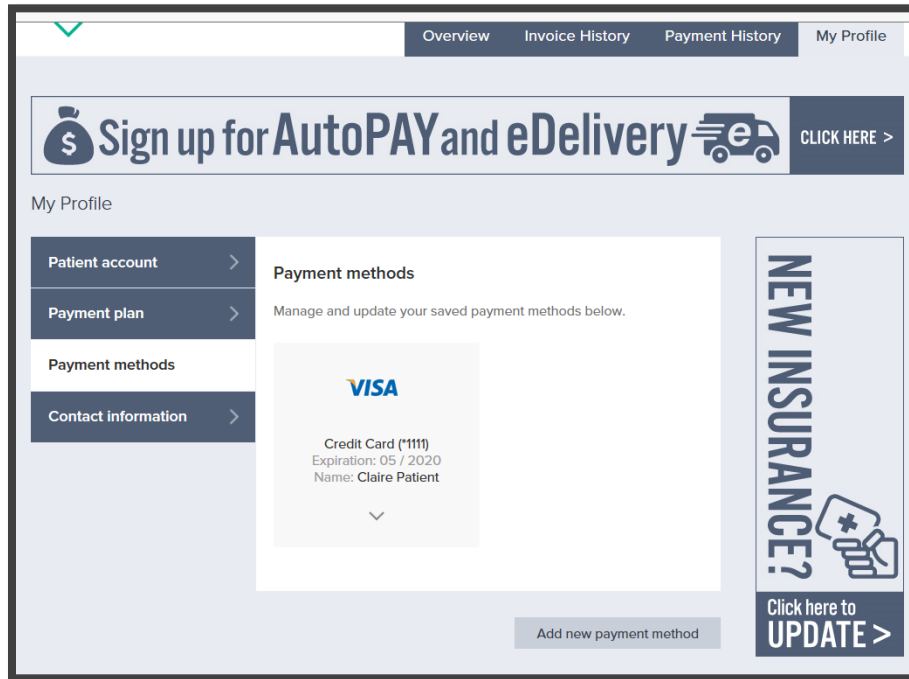
1. To edit a payment method, hover on the payment method and select Edit and follow the prompts.
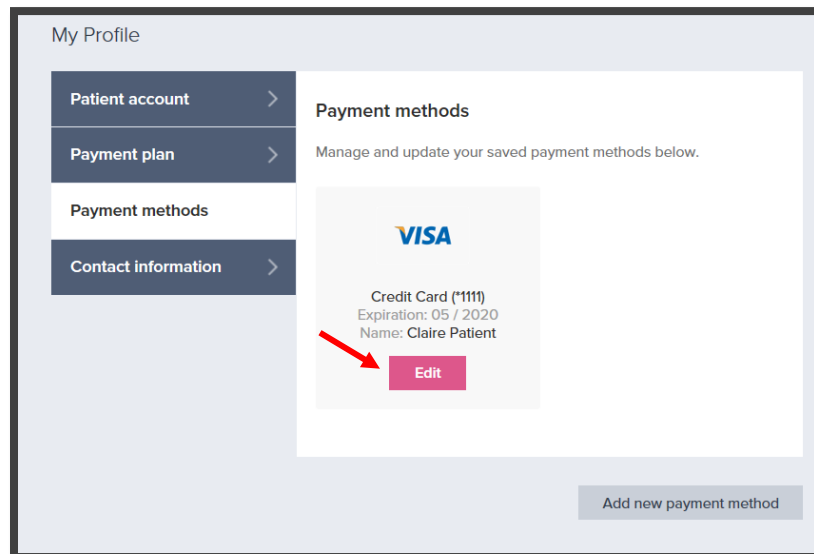
2. To add a payment method to be saved for future use, select Add new payment method.

3. Choose the payment method and enter all necessary details. Click **Continue.**

4. Enter the credit card information including card number and expiration date. Click **Submit Transaction** once all information is entered.

   Note: For security reasons, the screen to enter card information is only available for a set amount of time. The remaining time will display in the top left corner of the form.

5. Messaging will appear indicating the new payment method has been successfully added. Click **Done** to exit the screen.
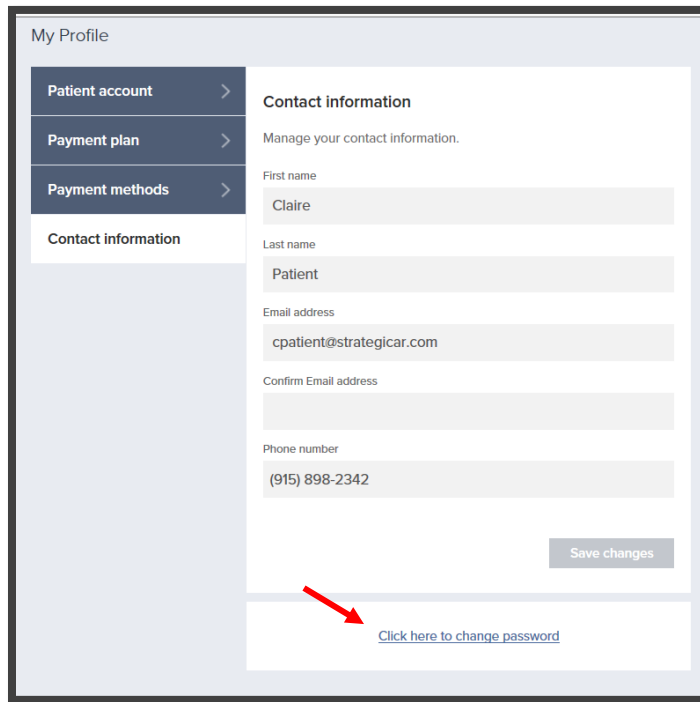

My Profile Tab - Contact information

The Contact information tab houses the email address used as the username to log into the Patient portal as well as the option to change the password.

1. To update the username used to log into the Patient Portal, update the Email address area and select Save changes.

2. To change the password, select the <u>Click here to change password</u> link.

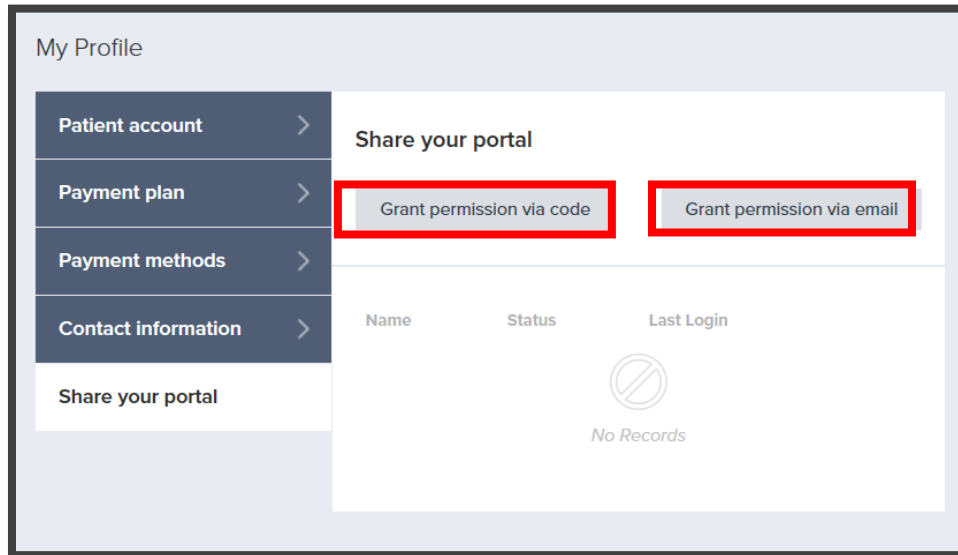a. Follow the Password criteria to populate the fields and select Change password.
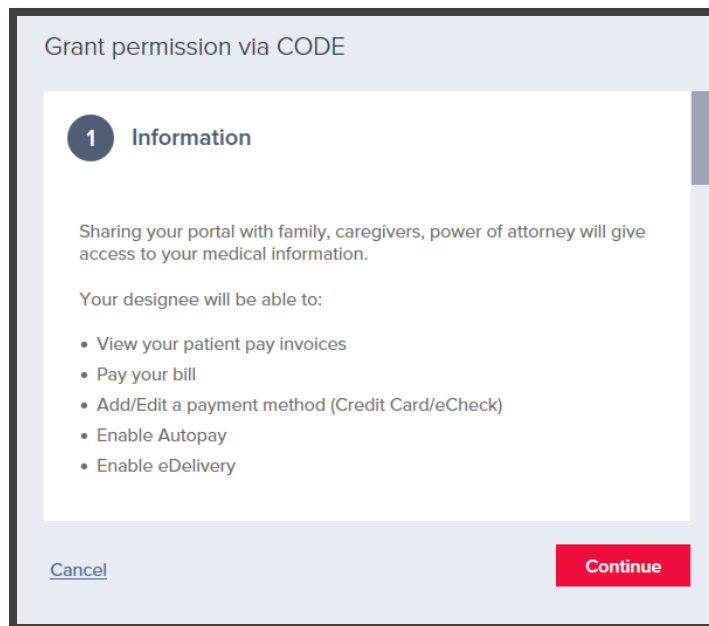
My Profile Tab – Share your portal

Through the patient portal, the patient can grant access to a non-patient (Family member, caregiver, etc.) via the patient portal.

1. From the **Share your portal** tab, select **Grant permission via code** or **Grant permission via email.**

2. Select Continue.

3. Enter user details and select **Grant**.

a. The non-patient user will login from the Home page as Register via code or utilizing the confirm email link.

b. Once complete, the non-patient user will appear within My Profile>Share your portal as active.

My Profile Tab – Revoking shared access

1. To revoke shared access for a user, from the **Share your portal** screen:

    a. Select the trash can icon next to a user.

    Revoke Access

    Please confirm if you want to revoke the access of the patient to the user.

    Cancel   Confirm
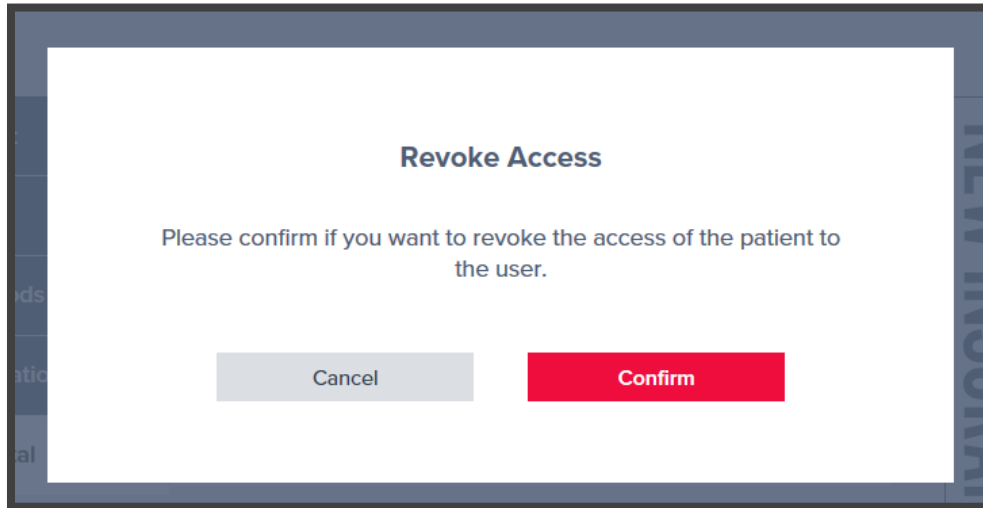
    b. Select Confirm. The user will now show "DeActivated".

    My Profile

    | Patient account | > |
    | Payment plan | > |
    | Payment methods | > |
    | Contact information | > |
    | Share your portal | |

    Share your portal

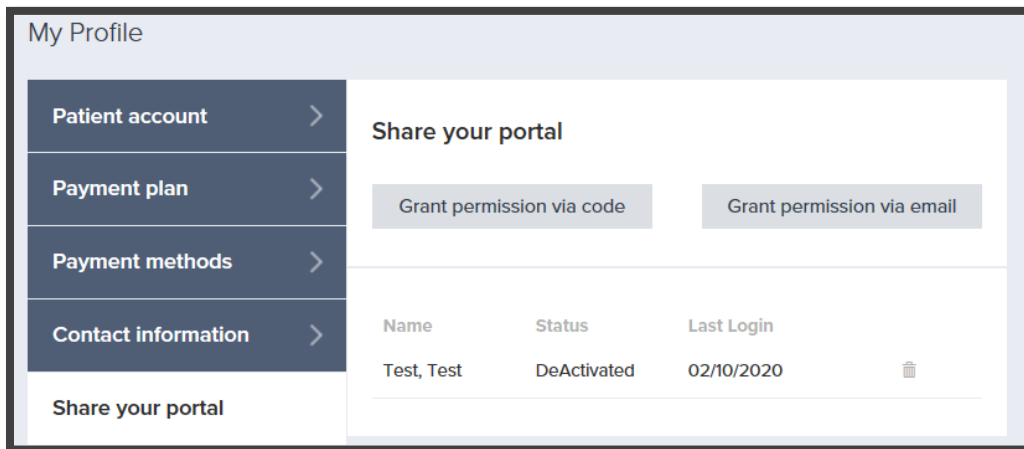   Grant permission via code   Grant permission via email

Name	Status	Last Login	
Test, Test	DeActivated	02/10/2020	🗑

Signing out of the Portal

Sign out of the Patient Portal by navigating to the top of the page. Select Sign Out.
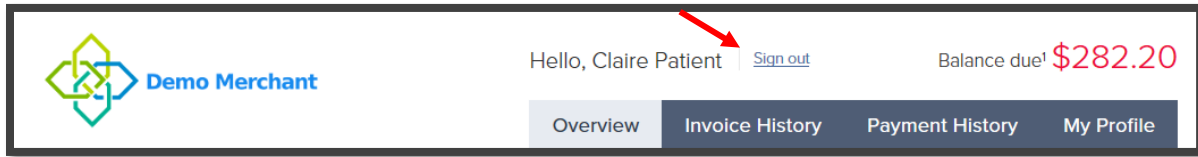

Options if multiple bill pay sites

Patients may encounter a need to be registered in multiple Patient Portal sites.

If the patient is already a Registered User on an existing Patient Portal they can use those same credentials to become a Registered User on an additional site.

To do this, the patient will navigate to the **NEW** site.

1. Use the same username/email and password that they use to access the **PREVIOUS** site to which they are already a Registered User. This will be entered in the Account login area just as the patient would if they were in the site to which they are already registered.
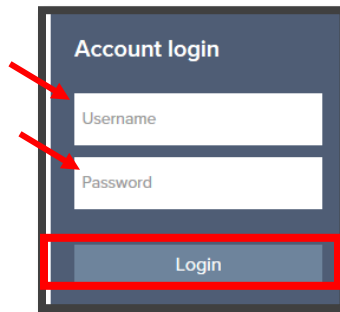
2. The Create Profile screen for the new site will populate. The patient will need to enter their Account # and Invoice # for the **NEW** site and Select Complete Registration. Once complete, both sites can now be accessed using the same credentials. The patient will **NOT** have visibility to both sites in 1 login. They will need to log in to each separately.