

# Patient Payment Plans: Processing Payments from the Reporting Screen

07/24/2024 7:15 pm EDT

You can quickly see what patient payment plans are due and process them manually if auto payment is not enabled.

- Navigate to Reports > Patient Payment Plan Report

| Patient Payment Plan |                      |                        |                        |                       |                     |                  |          |
|----------------------|----------------------|------------------------|------------------------|-----------------------|---------------------|------------------|----------|
| ⌵ Patient            | ⌵ Plan Creation Date | ⌵ Date of Last Payment | ⌵ Date of Next Payment | ⌵ Next Payment Amount | ⌵ Remaining Balance | ⌵ Original Total | Action   |
|                      | 08/29/2023           | N/A                    | 02/28/2024             | \$16.67               | \$100.02            | \$100.02         | Pay Skip |
|                      | 11/15/2023           | N/A                    | 02/29/2024             | \$133.76              | \$3210.33           | \$3210.33        | Pay Skip |
|                      | 11/16/2023           | N/A                    | 02/29/2024             | \$333.40              | \$2000.45           | \$2000.45        | Pay Skip |
|                      | 11/20/2023           | N/A                    | 02/29/2024             | \$25.00               | \$125.00            | \$125.00         | Pay Skip |
|                      | 12/04/2023           | N/A                    | 02/16/2024             | \$135.50              | \$3252.17           | \$3252.17        | Pay Skip |
|                      | 12/04/2023           | N/A                    | 02/06/2024             | \$218.25              | \$3492.01           | \$3492.01        | Pay Skip |

- Click on the up arrow to the left of the **Date of Next Payment** on the header row. This will sort the payments with the most current date first.

| ⌵ Date of Next Payment |
|------------------------|
| 02/06/2024             |
| 02/16/2024             |
| 02/28/2024             |
| 02/29/2024             |
| 02/29/2024             |
| 02/29/2024             |

- You can manually process any payment by moving to the right on the row and clicking on **Pay**.

| Action   |
|----------|
| Pay Skip |
| Pay Skip |
| Pay Skip |
| Pay Skip |
| Pay Skip |
| Pay Skip |

- The following window will allow you to process the payment manually.

## Process Patient Payment Plan Payment

×

Payment Plan Payment  
Amount

16.67

Swipe Card

Cardholder Name \*

Cardholder Name

Credit Card \*

Key enter credit card

Expiration \*

Close

Pay With Card