Posting a patient payment in the Appointment screen

07/24/2024 7:25 pm EDT

In addition to posting from the Patient Payments section, you can also post a patient payment from within the appointment window. The screens look and operate the same. Which you use is going to depend on your function and which part of the system you are in when you need to post the payment. Each will accomplish the same goal.

Posting a patient payment from the appointment screen will be very convenient when accepting copays and other payments for that date's services while checking the patient in for their appointment.

1. From the appointment window, select the Billing tab.

Appointment	Billing	Eligibility	Vitals	Growthcharts	Flags	Log Comm.	Revisions	Custom Data	MU Helper
		-				Patient SuperBil	Clinical Note	Billing Details	Other Forms

2. Click on the **blue +** on the Patient Payment row.

Appointment	Billing	Eligibility	Vitals	Grov	wthcharts
0 B	illing Status			~	I
	ICD Version	ICD-10		~	
Prin	mary Insurer	- Default -		~	
Secon	dary Insurer	- Default -		~	
Patie	ent Payment	\$ 0	+		
Pre Authorizati	ion Approval				
	Referral #				
Payr	ment Profile	Insurance		~	
В	Silling Profile	~	+		
Billi	ing Pick List	Choose Code	es from Pick List	:	
Diagnos	sis Pick List	Choose Code	es from Pt Proble	ems	

3. A New Cash window will open to allow you to enter the payment details. Once entered, click on Add.

New Cash	×
Payment Dat	10/21/2020
Appointmen	10/21/2020 02:00PM (\$0.00) V
Line Iter	~
Provide	~
Payment Metho	Cash ~
Тур	Credit ~
Note	
Amour	\$
Code Applied	Balance Payment Type
	Add Cancel

Viola! You just posted a payment to the patient's appointment!