

Patient Payment Plans: Late Payments

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If you have patients on payment plans who are not on a recurring payment via a credit card on file, there is an easy way to see if any payment is overdue.

1. Navigate to Report > Patient Payment Plan Report
2. Click on the up/down arrows next to the **Date of Next Payment** column
 - a. This will sort the upcoming payments for all patients by the due date.

Patient Payment Plan			
⌵ Patient	⌵ Plan Creation Date	⌵ Date of Last Payment	⌵ Date of Next Payment
Lucas (Demo) Harris Sr.	12/21/2023	N/A	02/20/2024

3. If you would like to process the payment, you can right from this screen by clicking on **Pay** under the Action column.

Please note, that this will only work if there is a saved credit card on file, or the patient's card is present.

⌵ Remaining Balance	⌵ Original Total	Action
\$300.00	\$300.00	<input type="button" value="Pay"/> <input type="button" value="Skip"/>