

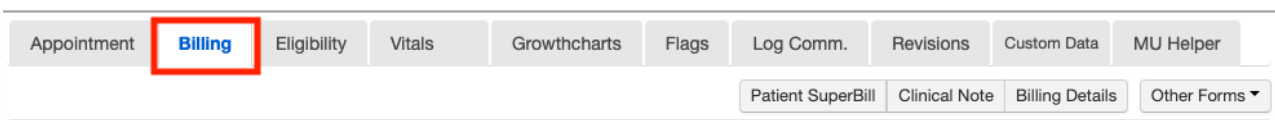
Posting a patient payment in the Appointment screen

07/08/2024 7:52 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.

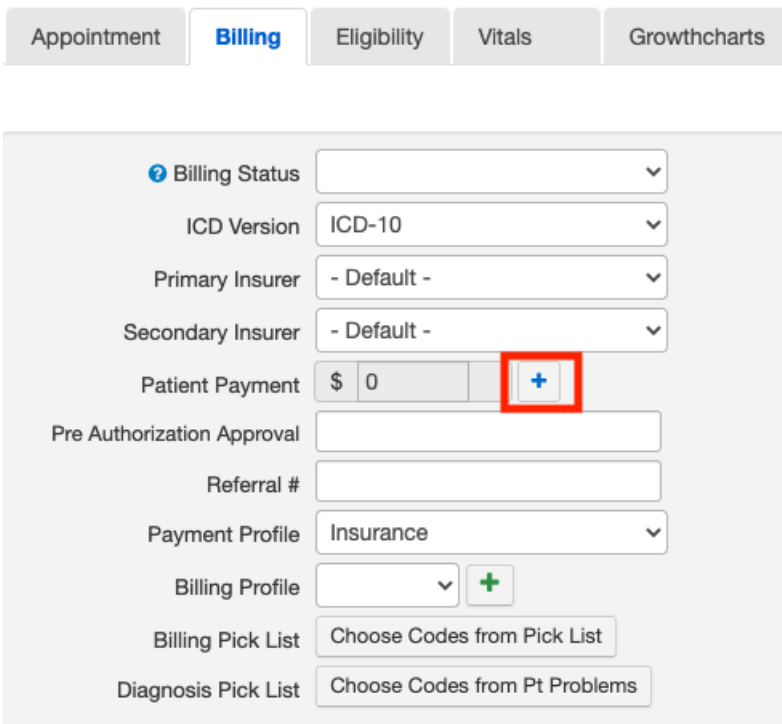
Posting a patient payment from the appointment screen will be very convenient when accepting copays and other payments for that date's services while checking the patient in for their appointment.

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



A horizontal row of tabs for the appointment window. The tabs are: Appointment, Billing (highlighted with a red box), Eligibility, Vitals, Growthcharts, Flags, Log Comm., Revisions, Custom Data, and MU Helper. Below this row are four buttons: Patient SuperBill, Clinical Note, Billing Details, and Other Forms (with a dropdown arrow).

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



A screenshot of the Billing tab interface. It shows a list of fields for patient information and billing details. The 'Patient Payment' field is highlighted with a red box around a blue '+' button. The fields include: Billing Status (dropdown), ICD Version (ICD-10), Primary Insurer (- Default -), Secondary Insurer (- Default -), Patient Payment (\$ 0), Pre Authorization Approval (text input), Referral # (text input), Payment Profile (Insurance), Billing Profile (dropdown with a green '+' button), Billing Pick List (Choose Codes from Pick List), and Diagnosis Pick List (Choose Codes from Pt Problems).

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

New Cash ✕

Payment Date

Appointment ▾

Line Item ▾

Provider ▾

Payment Method ▾

Type ▾

Notes

Amount \$

Code	Applied	Balance	Payment Type
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Viola! You just posted a payment to the patient's appointment!
