

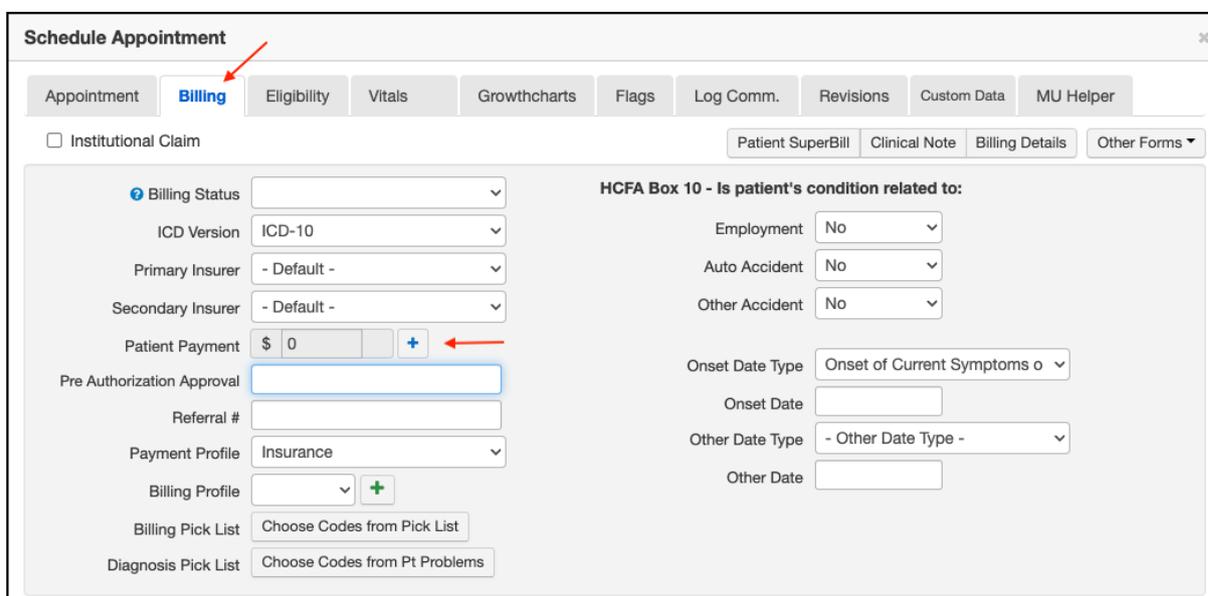
Posting a patient payment in the Appointment screen

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



The screenshot shows the 'Schedule Appointment' interface. At the top, there are several tabs: Appointment, Billing (selected), Eligibility, Vitals, Growthcharts, Flags, Log Comm., Revisions, Custom Data, and MU Helper. Below the tabs, there are buttons for Patient SuperBill, Clinical Note, Billing Details, and Other Forms. The main form area is divided into two columns. The left column contains fields for Billing Status, ICD Version (set to ICD-10), Primary Insurer, Secondary Insurer, Patient Payment (set to \$ 0 with a blue '+' button highlighted by a red arrow), Pre Authorization Approval, Referral #, Payment Profile (set to Insurance), Billing Profile, Billing Pick List, and Diagnosis Pick List. The right column is titled 'HCFA Box 10 - Is patient's condition related to:' and contains fields for Employment, Auto Accident, Other Accident, Onset Date Type, Onset Date, Other Date Type, and Other Date.

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

New Cash ✕

Payment Date

Appointment

Line Item

Provider

Payment Method

Type

Notes

Amount \$

Receipt

Email Receipt

Text Receipt

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