

# Patient Payment Plans: Processing Payments from the Reporting Screen

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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

Cardholder Name \*

Credit Card \*

Expiration \*