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.

1. Navigate to Reports > Patient Payment Plan Report

F	tient Payment Plan							
© P	atient	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

2. Press 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.

Patient Payment Plan							
From – To Show only Active Plans Show only Late Plans Search							
Patient	Plan Creation Date	Date of Last Payment	Date of Next Payment	Next Payment Amount	Remaining Balance	Original Total	Action
Sample Sam	12/11/2023	N/A	N/A	\$0	\$25.00	\$100.00	Pay Skip
Lucas (Demo) Harris Sr.	12/21/2023	N/A	N/A	\$0	\$300.00	\$300.00	Pay

3. You can manually process any payment by moving to the right on the row and pressing Pay.



4. The following window will allow you to process the payment manually.

Process Patient Payment Plan Payment				
Payment Plan Payment Amount	16.67 Swipe Card			
Cardholder Na	me * Name			
Credit Card *	edit card			
Expiration *				
	Close Pay With Ca	rd		