

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.

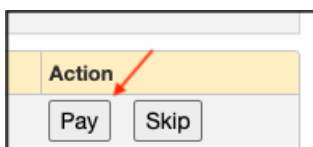
1. Navigate to Reports > Patient Payment Plan Report

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

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	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 Skip

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 Name *

Cardholder Name

Credit Card *

Key enter credit card

Expiration *

Close

Pay With Card