## **Patient Balance Widget**

Last modified on 04/21/2025 10:02 am EDT

## **Patient Balance Widget**

The Patient Balance widget on your dashboard will show you the total outstanding patient balance, the number of active payment plans, and the number of late payment plans.

Welcome,			Today is 4/21/2025, Monday   🔅	
Provider Office	Messages	Claims by Claim Status 331	Go to Billing	
Randi Beavers     All Offices     Idde Past Appointments     Today      04/21/2025     >       No Appointments available	Filter by Patient     All • <ul> <li>Generated Sheet: patient_payments_04112025.csv</li> <li>Message</li> <li>Generated Sheet: patient_BLS_041_2025.csv</li> <li>Generated Sheet: balance_ledger_126101030_04112025.csv</li> <li>Message</li> <li>Generated Sheet: balance_ledger_126101030_04112025.csv</li> <li>Message</li> <li>Generated Sheet: balance_ledger_126101030_04112025.csv</li> <li>Message</li> <li>Generated Sheet: calains_report_11112024.csv</li> <li>Message</li> <li>Option2024</li> <li>Generated Sheet: remitance_report_09202024.csv</li> <li>Message</li> <li>Option2024</li> <li>Showing 5 of 66 records 1:</li> <li>Y Prev</li> <li>Next + Y</li> <li>View All</li> </ul>	Claims in Progress     In Process at Payer     Payer Acknowledged     Coordination of Benefits     In Process at Clearinghouse     Coordination of Benefits     On In Process at Clearinghouse     Coordination	Calamis to Review     >       0     ERA Received     >       0     ERA Denied     >       235     Not Submitted     >       0     Missing Information     >       0     Rejected     >	
	Post Time Period Part 30 Days Patient Payments S0 > Unallocated Patient Payments S0 > Unallocated Patient Payments S0 >	Patient Balance Total Outstanding Patient Balance 35 Active Payment Plans 2 Late Payment Plans	\$\$113.19 > > >	

To enable this widget:

1. Press the gear icon on your dashboard.



2. Select the checkbox next to Patient Balance.

Dashboard Setting	gs	×
Default Landing Page <ul> <li>Dashboard</li> </ul>	() c	alendar
Widgets (Up to 5)	Messages	Tasks
Claims By Claim Status	Post	Patient Balance
		Cancel Save

- 3. The Patient Balance widget will now show on your dashboard, showing the total outstanding patient balance, how many active payment plans are listed for your office, and how many late payment plans are listed for your office.
  - a. To see additional details regarding the total outstanding balance, the active payment plans, or the late payment plans, press the blue arrow on the right. You will be taken to a screen where you can see details.

Patient Balance	
Total Outstanding Patient Balance	\$5582.83
35 Active Payment Plans	>
7 Late Payment Plans	>

b. Pressing Total Outstanding Patient Balance will take you to the Live Claims Feed

02/20/2024	02/25/2024 - 02/24/2025 Show only Active Plans Search						
Patient	Plan Creation Date	Date of Last Payment	Date of Next Payment	Next Payment Amount	Remaining Balance	Original Total	Action
Benjamin Brammer	03/12/2024	N/A	N/A	\$0	\$150.00	\$150.00	Pay
Sample Sam	03/12/2024	N/A	N/A	\$0	\$1000.00	\$1000.00	Pay
Jenny (Jen) Harris	01/28/2025	N/A	02/27/2025	\$0.41	\$10.00	\$10.00	Pay
Sample Good Faith Estimate	02/10/2025	N/A	N/A	\$0	\$75.00	\$75.00	Pay
Test Datient	02/12/2025	N/A	03/12/2025	\$150.00	\$1500.00	\$1500.00	Pay S

c. Pressing Active Payment Plans will take you to a screen showing active payment plans for your office.

d. Pressing Late Payment Plans will take you to a screen showing late payment plans for your office.

Patient Payment Plan       02/25/2024     -     02/24/2025     Show only Active Plans     Search							
Patient	Plan Creation Date	Date of Last Payment	Date of Next Payment	Next Payment Amount	Remaining Balance	Original Total	Action
Benjamin Brammer	03/12/2024	N/A	N/A	\$0	\$150.00	\$150.00	Pay Skip
Sample Sam	03/12/2024	N/A	N/A	\$0	\$1000.00	\$1000.00	Pay Skip
Jenny (Jen) Harris	01/28/2025	N/A	02/27/2025	\$0.41	\$10.00	\$10.00	Pay Skip
Sample Good Faith Estimate	02/10/2025	N/A	N/A	\$0	\$75.00	\$75.00	Pay Skip
Test Patient	02/12/2025	N/A	03/12/2025	\$150.00	\$1500.00	\$1500.00	Pay Skip