

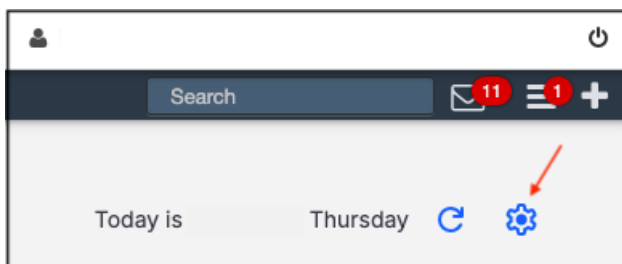
Patient Balance Widget

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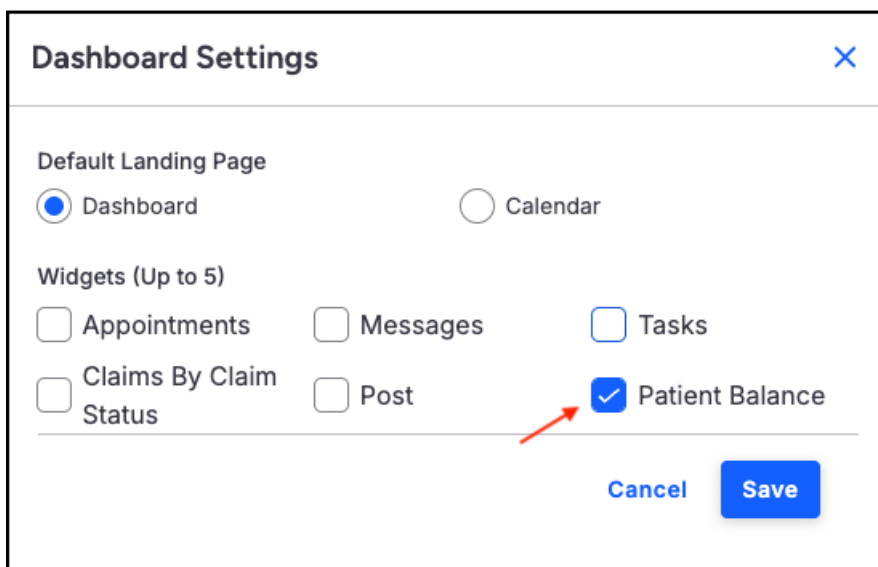
Patient Balance Widget

The Patient Balance widget on your dashboard will show you the total outstanding patient balance, how many active payment plans, and how many late payment plans there are. To enable this widget:

1. Press the gear icon on your dashboard.



2. Select the checkbox next to **Patient Balance**.



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

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

Patient Payment Plan

02/25/2024 – 02/24/2025 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 |
|----------------------------|----------------------|------------------------|------------------------|-----------------------|---------------------|------------------|--|
| 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 |

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 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 |
|----------------------------|----------------------|------------------------|------------------------|-----------------------|---------------------|------------------|--|
| 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 |