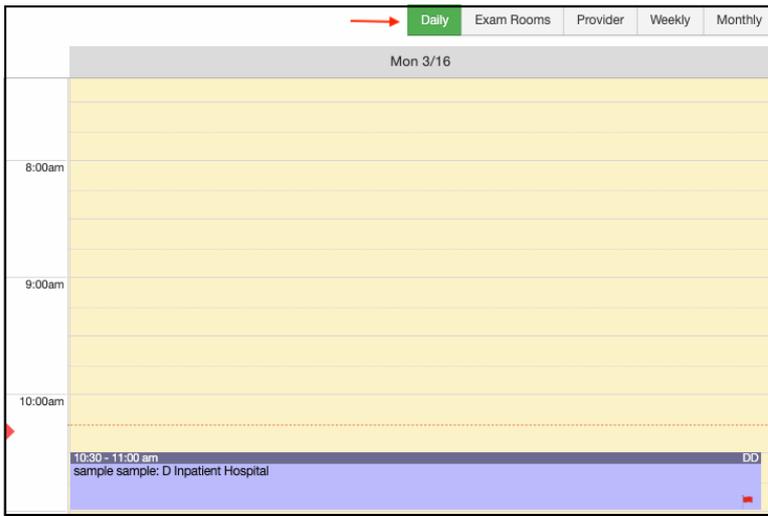


Copay on Daily Calendar View

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The Daily View on the calendar shows when the patient has paid their copay for the visit by cash, check, or credit card. It is hidden in the weekly and monthly calendar views to reduce visual clutter.

1. Navigate to Schedule > Calendar
2. Select the Daily View on the right



3. Select the patient's appointment
4. Navigate to the Billing tab
5. Select the blue + symbol next to Patient Payment

A screenshot of the 'Schedule Appointment' form, specifically the 'Billing' tab. The form contains various fields for patient information and billing details. The 'Patient Payment' field is highlighted with a red arrow pointing to a blue '+' symbol next to the amount '\$ 0'. Other fields include 'Billing Status', 'ICD Version', 'Primary Insurer', 'Secondary Insurer', 'Pre Authorization Approval', 'Referral #', 'Payment Profile', 'Billing Profile', 'Billing Pick List', and 'Diagnosis Pick List'. On the right side, there is a section for 'HCFA Box 10 - Is patient's condition related to:' with sub-fields for 'Employment', 'Auto Accident', and 'Other Accident', each with a 'No' dropdown. There are also fields for 'Onset Date Type', 'Onset Date', 'Other Date Type', and 'Other Date'.

6. The New Cash window will open. Fill in the payment method and the amount. Be sure to select email or text receipt.

New Cash ×

Payment Date

Appointment

Line Item

Provider

Payment Method ←

Type

Notes

Amount ←

Receipt

Email Receipt ←

Text Receipt

7. Once saved, the word copay will appear on the daily calendar view next to the patient's appointment. If you hover over the word copay, a "patient paid" message will appear, confirming that the patient did pay their appointment copay.

