

# Payment Plan Guides

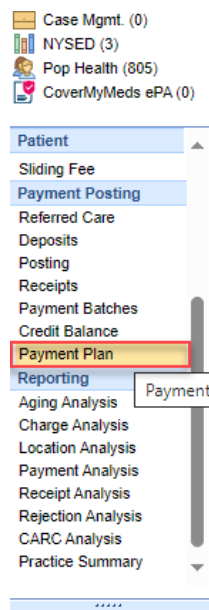
Last Modified on 10/15/2024 4:41 pm EDT

## Creating a New Payment Plan

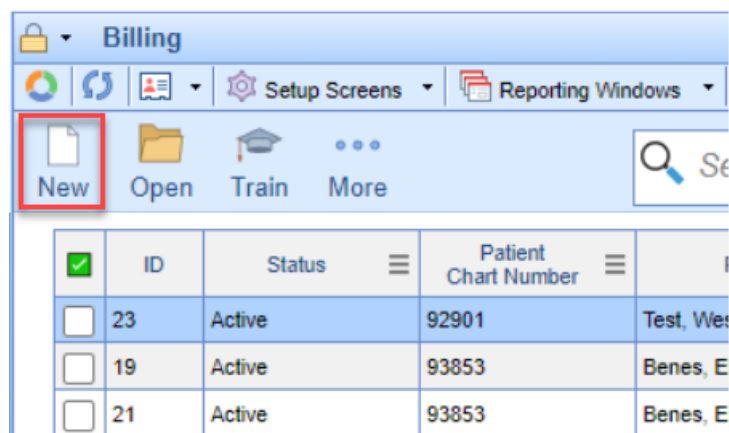
The Payment Plan Window allows users to create a new **payment plan** in the application allowing patients to pay high balances over time.

## Creating a New Payment Plan

1. To create a new payment plan, a user will navigate to the **Payment Plan** window within the Billing portal.



2. Once on the Payment Plan window, click the **New** button on the toolbar.



3. Select the patient from the patient search window.

**Patient Identifier**

Before creating a new payment plan, please supply a patient

Patient

OK Cancel

4. The **New Payment Plan** window will be displayed. It includes a section dedicated to existing payment plans, which allows users to view any current payment plans they have in place. There is also a Patient Balance Claims section that displays any outstanding patient claim balances. Finally, there is a Payment Plan Details section, which allows users to set up a new payment plan, and a Payment Plan Summary (this section will appear after the payment plan is created) that displays the payment plan installment number, due date, and payment amount.

**Payment Plan Setup for Patient: 11593 - Health Plan: . 01/10/2009**

✓ Existing Payment Plans - Remaining Total: \$183.33

Status	Total	Remaining	Installment	Start	End	Due	Comment
Active	\$200.00	\$183.33	\$16.67	10/03/2024	09/03/2025	11/03/2024	

✓ Patient Balance Claims

#	Claim ID	Claim DOS	Status	Payer	Charges	Payments	Adjustments	Balance
<input type="checkbox"/>	33154	02/01/2018	Sent, Statement	United Healthcare	\$98.91	\$0.00	(\$33.12)	\$65.79
<input type="checkbox"/>	33303	02/05/2018	Sent, Statement	United Healthcare	\$98.91	\$0.00	(\$33.12)	\$65.79
<input type="checkbox"/>	33501	02/08/2018	Sent, Statement	United Healthcare	\$98.91	\$0.00	(\$33.12)	\$65.79
<input type="checkbox"/>	33646	02/12/2018	Sent, Statement	United Healthcare	\$98.91	\$0.00	(\$33.12)	\$65.79
<input type="checkbox"/>	33761	02/14/2018	Sent, Statement	United Healthcare	\$98.91	\$0.00	(\$33.12)	\$65.79
<input type="checkbox"/>	34823	03/07/2018	Sent, Statement	United Healthcare	\$98.91	(\$59.21)	(\$33.12)	\$6.58

✓ Payment Plan Details

Responsible Party	1: Smith, Alayna		
Plan Total	\$ <input type="text"/>	Credit Card	
Installment Amount	\$ <input type="text"/>	Number of Installments	# <input type="text"/>
Installment Start	<input type="text" value="10-14-2024"/>	Installment Type	<input checked="" type="radio"/> Monthly <input type="radio"/> Weekly
Plan Comments	<input type="text"/>		
Plan Flags	<input checked="" type="checkbox"/> Recurring payments <input type="checkbox"/> Exclude claims from statements <input type="checkbox"/> Do not send statement		

# Select Claims for Payment Plan

This is where you will choose which claim(s) or balance(s) you wish to associate with the payment plan.

1. Check the box(es) to the left of the existing claim(s) balance(s) you want to include in your payment plan.

Payment Plan Setup for Patient: 11593 - Smith, Alayna . 01/10/2009

Existing Payment Plans - Remaining Total: \$183.33

Status	Total	Remaining	Installment	Start	End	Due	Comment
Active	\$200.00	\$183.33	\$16.67	10/03/2024	09/03/2025	11/03/2024	

Patient Balance Claims - \$131.58/\$335.53

#	Claim ID	Claim DOS	Status	Payer	Charges	Payments	Adjustments	Balance
<input checked="" type="checkbox"/>	33154	02/01/2018	Sent, Statement	United Healthcare	\$98.91	\$0.00	(\$33.12)	\$65.79
<input checked="" type="checkbox"/>	33303	02/05/2018	Sent, Statement	United Healthcare	\$98.91	\$0.00	(\$33.12)	\$65.79
<input type="checkbox"/>	33501	02/08/2018	Sent, Statement	United Healthcare	\$98.91	\$0.00	(\$33.12)	\$65.79
<input type="checkbox"/>	33646	02/12/2018	Sent, Statement	United Healthcare	\$98.91	\$0.00	(\$33.12)	\$65.79
<input type="checkbox"/>	33761	02/14/2018	Sent, Statement	United Healthcare	\$98.91	\$0.00	(\$33.12)	\$65.79
<input type="checkbox"/>	34823	03/07/2018	Sent, Statement	United Healthcare	\$98.91	(\$59.21)	(\$33.12)	\$6.58

Payment Plan Details

Responsible Party: 1: Smith, Alayna

Please note that although the selected claim(s) balance calculation will be automatically incorporated into the payment plan, the payment plan details screen gives users the ability to manually adjust the amount.

# Enter the Payment Plan Details

This is where you will enter your payment plan details (installment amounts, dates, recurring payments, etc.)

1. With the Payment Plan Details section, verify your Plan Total (calculated from the selected claims).
2. Select your installment amount or your number of installments.
  1. If you select to enter an installment amount, the system will calculate and populate the number of installments needed to fulfill the total balance.
  2. If you select enter the Number of Installments, the system will calculate the installment amount based on the # of payments.

The last installment payment may be different from the other installment amounts depending on how the total amount is divided by the number of installments, as well as the company's setting that determines the minimum payment allowed as the last installment payment. For more information on this setting, visit our [Payment Plan Setup](#) help article.

3. Select the first installment date (Installment Start).
4. Select your Installment Type (Monthly or Weekly).
5. **Optional:** Save a patient credit card on file by selecting "Add Card" at the bottom of the screen. This will link the card to the payment plan to be used for recurring processing and manual processing.
6. **Optional:** Enter any payment plan comments.
7. Select your optional plan flag(s)
  1. Recurring Payment: This will flag the payment plan for the recurring payment process.
  2. Exclude claims from statements: This will exclude the selected claims from being included in the patient's statement.
  3. Do not send statements: This will set the Do Not Send Patient Statement flag for the patient while the payment plan is in Active Status.
8. Click **Save**.

Payment Plan Setup for Patient: 11593 . 01/10/2009

Existing Payment Plans - Remaining Total: \$314.91

Status	Total	Remaining	Installment	Start	End	Due	Comment
Active	\$200.00	\$183.33	\$16.67	10/03/2024	09/03/2025	11/03/2024	
Active	\$131.58	\$131.58	\$21.93	10/14/2024	03/14/2025	10/14/2024	

Patient Balance Claims - \$131.58/\$203.95

#	Claim ID	Claim DOS	Status	Payer	Charges	Payments	Adjustments	Balance
<input checked="" type="checkbox"/>	33501	02/08/2018	Sent, Statement	United Healthcare	\$98.91	\$0.00	(\$33.12)	\$65.79
<input checked="" type="checkbox"/>	33648	02/12/2018	Sent, Statement	United Healthcare	\$98.91	\$0.00	(\$33.12)	\$65.79
<input type="checkbox"/>	33761	02/14/2018	Sent, Statement	United Healthcare	\$98.91	\$0.00	(\$33.12)	\$65.79
<input type="checkbox"/>	34823	03/07/2018	Sent, Statement	United Healthcare	\$98.91	(\$59.21)	(\$33.12)	\$6.58

Payment Plan Details

Responsible Party: 1

Plan Total: \$ 131.58 Credit Card

Installment Amount: \$ 21.93 Number of Installments: # 6

Installment Start: 10-14-2024 Installment Type:  Monthly  Weekly

Plan Comments:

Plan Flags:  Recurring payments  Exclude claims from statements  Do not send statement

Payment Plan Installment Summary

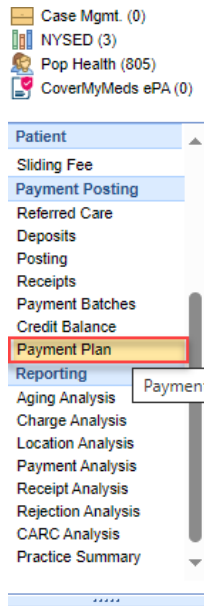
Add Card Save Close

## Payment Plan Actions

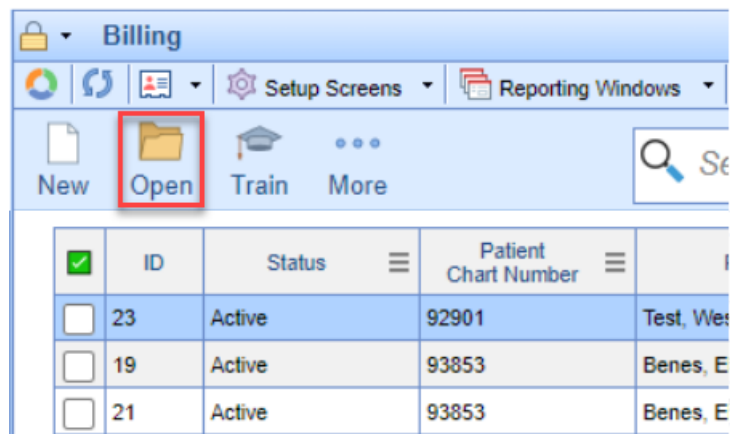
Once you have set up a payment plan, you may find that some edits or updates need to be made to the existing plan. There are various actions you can perform on the existing payment plans from the **Payment Plan Details** Screen.

## Payment Plan Actions

1. To perform additional actions on an existing payment plan, navigate to the **Payment Plan** window within the Billing portal.



- From the Payment Plan window, highlight the desired payment plan and click "Open." Alternatively, you can simply double-click on the desired payment plan from the list to open it.



- Within the payment plan **Detail Actions**, select the desired action from the available options.

## Payment Plan

### Payment Plan Details

Plan Information	ID: 21 Initial: \$500.00 Writeoff: \$0.00 Type: Monthly				
Patient Information	Chart: 93853 Name: Benes, Elaine DOB: 11/10/1971				
Responsible Party	Sys ID: 297619 Name: Benes, Elaine				
Comment					
Status	Active	Total	\$500.00	Card on File	No
Installment Start Date	06/10/2024	Paid	\$0.00	Recurring Payments	Yes
Installment End Date	03/10/2025	Remaining (10)	\$500.00	Exclude Claims from Statement	No
Next Due Date	06/10/2024	Installment (10)	\$50.00	Do Not Send A Statement	No

### Included Payment Plan Balance Claims

#	Claim ID	Claim DOS	Status	Payer	Charges	Payments	Adjustments	Balance
<input type="checkbox"/>	86864	10/19/2023	Rejected	Aetna	\$500.00	\$0.00	\$0.00	\$500.00

### Payment Plan Summary

#	Installment Due Date	Installment Amount	Paid Amount	Paid Dates
1	06/10/2024 *	\$50.00	\$0.00	
2	07/10/2024	\$50.00	\$0.00	
3	08/10/2024	\$50.00	\$0.00	
4	09/10/2024	\$50.00	\$0.00	
5	10/10/2024	\$50.00	\$0.00	
6	11/10/2024	\$50.00	\$0.00	
7	12/10/2024	\$50.00	\$0.00	
8	01/10/2025	\$50.00	\$0.00	
9	02/10/2025	\$50.00	\$0.00	
10	03/10/2025	\$50.00	\$0.00	



### Detail Actions

- Print Plan
- Update Plan
- Update Status
- Resp. Party
- Deferment
- Add Card

### Claim Actions

- Remove Claim

## Update a Payment Plan

When a user clicks **Update Plan** within the **Detail Actions** in the **Payment Plan Details Screen**, the following takes place:

1. The Update Payment Plan screen comes up.
2. Enter any desired edits or updates.
  1. **Optional:** Enter any applicable write-off or adjustment.
  2. **Optional:** Edit the total amount due.
  3. **Optional:** Edit the installment amount.
  4. **Optional:** Edit the number of installments.
  5. **Optional:** Enter any payment plan comments.
  6. **Optional:** Select any payment plan flag(s)
    1. Recurring Payment: This will flag the payment plan for the recurring payment process.
    2. Exclude claims from statements: This will exclude the selected claims from being included in the patient's statement.
    3. Do not send statements: This will set the Do Not Send Patient Statement flag for the patient while the payment plan is in Active Status.

### Update Payment Plan ✕

Initial Amount \$200.00

Writeoff Adjustment

Total

Installment Amount

Number of Installments

Comments

Recurring payments

Exclude claims from statements

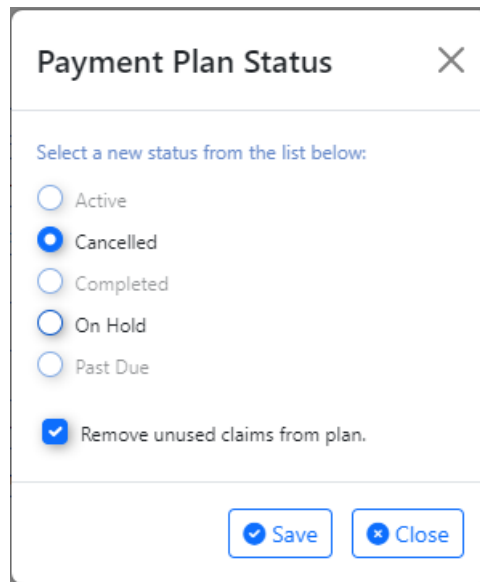
Do not send statement

3. Click **Save**.

## Update a Payment Plan Status

When a user clicks **Update Status** within the **Detail Actions** in the **Payment Plan Details Screen**, the following takes place:

1. The Payment Plan status screen comes up.
2. Select the new status from the list:
  1. **Active:** The Payment Plan is active with expected payment amounts and dates.
  2. **Cancelled:** The payment plan has been canceled.
  3. **Completed:** The entire payment plan balance was paid in full and no remaining balance exists.
  4. **On Hold:** The payment plan is in a hold state.
  5. **Past Due:** The payment plan has an installment that has been deemed past due.
3. Select if you want to remove any unused claims from the plan.



**Payment Plan Status** [X]

Select a new status from the list below:

- Active
- Cancelled
- Completed
- On Hold
- Past Due

Remove unused claims from plan.

[Save] [Close]

4. Click **Save**.

## Change Responsible Party

When a user clicks **Resp Party** within the **Detail Actions** in the **Payment Plan Details Screen**, the following takes place:

1. The Change Responsible Party screen comes up.
2. Click the dropdown to select the responsible party from the options.



**Change Responsible Party** [X]

1: [Dropdown Menu]

[Save] [Close]

3. Click **Save**.

## Defer a Payment Plan

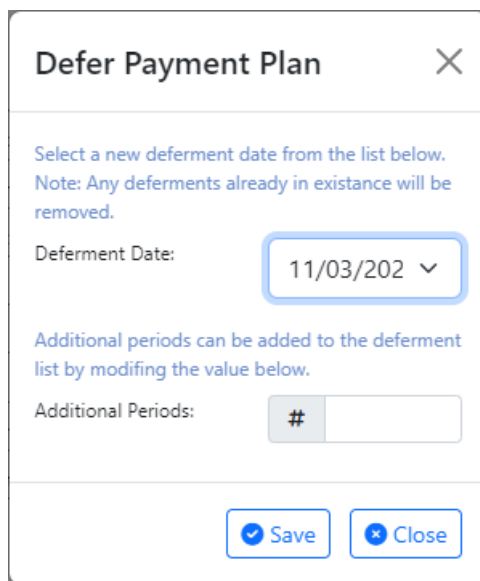
You can choose to delay or "defer" a payment until a future date by selecting this option. When a user clicks **Deferment** within the **Detail Actions** in the **Payment Plan Details Screen**, the following takes place:

1. The Defer Payment Plan screen comes up.
2. Select a new deferment date (new date for the payment) from the dropdown list.

Please note that any existing deferments will be removed.



3. **Optional:** Add any additional periods (# of additional installments to extend the timeframe).



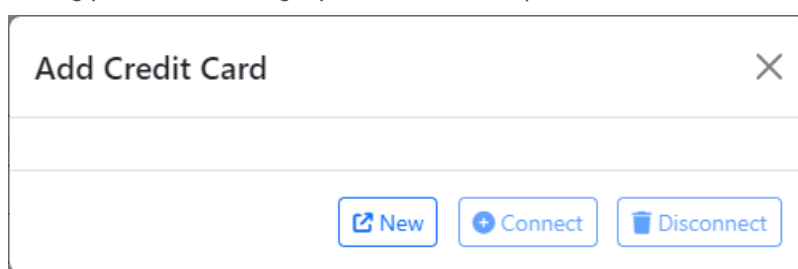
The image shows a dialog box titled "Defer Payment Plan" with a close button (X) in the top right corner. The main content area contains the following text: "Select a new deferment date from the list below. Note: Any deferments already in existence will be removed." Below this is a label "Deferment Date:" followed by a dropdown menu showing "11/03/2022" with a downward arrow. Further down, it says "Additional periods can be added to the deferment list by modifying the value below." This is followed by a label "Additional Periods:" and a text input field containing a hash symbol "#". At the bottom of the dialog, there are two buttons: "Save" with a checkmark icon and "Close" with an X icon.

4. Click **Save**.

## Adding a Credit Card to a Payment Plan

You can save a new or existing patient credit card and associate it with the payment plan for recurring and manual processing by selecting this option. When a user clicks **Add Card** within the **Detail Actions** in the **Payment Plan Details Screen**, the following takes place:

1. The Add Credit Card screen comes up.
2. Select new to add a new credit card, or select an existing card to connect/link to the payment plan (this is the same as the existing process of saving a patient credit card).



The image shows a dialog box titled "Add Credit Card" with a close button (X) in the top right corner. The main content area is mostly blank. At the bottom of the dialog, there are three buttons: "New" with a plus icon, "Connect" with a plus icon, and "Disconnect" with a trash can icon.

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## Payment Plan Best Practices

It is recommended that the practice or office establish the following standard operating procedures as "best practices" or guidelines when creating payment plans based on your personnel, existing practices, and preferences.

- **Eligibility Criteria:** Define the types of patients and/or procedures that will be eligible for payment plans (e.g., those with high deductibles, those not covered by insurance, all procedures, etc.).

- **Administrative Fees:** Determine if patients will incur any administrative fees by opting into a payment plan.
  - **Multiple Plans:** Determine if patients may have multiple payment plans at once on file.
  - **Plan Options:** Define plan limitations. For example, payments must be made at least monthly, each payment must be a minimum of \$10.00, payment plans cannot exceed one year in length, etc.
  - **Payment Options:** Determine the types of acceptable payments for payment plans.
  - **Late/missed:** Determine if there will be penalties for late or missed payments.
-