

Payment Plan Guides

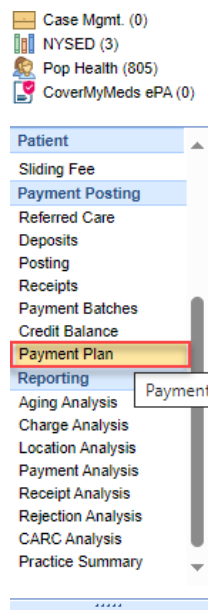
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Creating a New Payment Plan

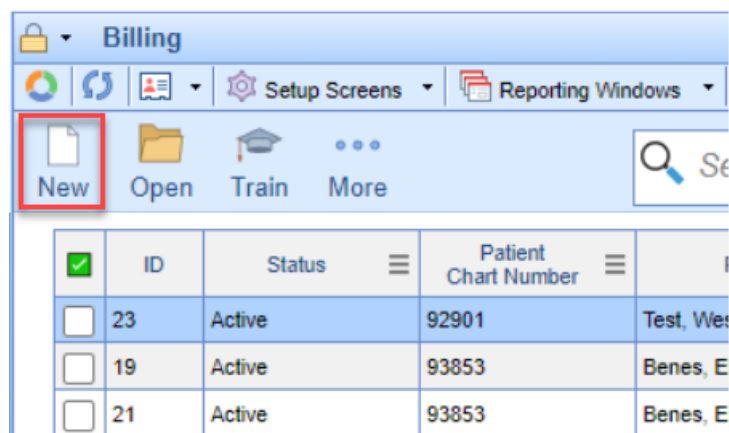
The Payment Plan Window allows users to create a new **payment plan** in the application allowing patients to pay high balances over time.

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. There is a Payment Plan Details section, which allows users to set up the details of the new payment plan. Lastly, there is a Payment Plan Summary (this section will appear after the payment plan details has been added) that displays the payment plan installment number, due dates, and payment amount.

Payment Plan Setup for Patient: 93980 - Test, Michell . 01/01/1990

▼ Existing Payment Plans - Remaining Total: \$122.00

Status	Total	Remaining	Installment	Start	End	Due	Comment
Active	\$30.00	\$22.00	\$2.00	10/17/2024	12/17/2025	02/17/2025	
Completed	\$270.00	\$0.00	\$70.00	12/03/2024	03/03/2025	03/03/2025	
Past Due	\$100.00	\$100.00	\$5.00	12/17/2024	07/17/2026	12/17/2024	
Cancelled	\$20.00	\$0.00	\$20.00	12/18/2024	12/18/2024	12/18/2024	
Past Due	\$5.23	\$0.00	\$5.23	12/18/2024	12/18/2024	12/18/2024	

▼ Patient Balance Claims

#	Claim ID	Claim DOS	Status	Payer	Charges	Payments	Adjustments	Balance
<input type="checkbox"/>	66422	02/15/2023	Sent, Statement	Aetna Test	\$800.00	(\$465.00)	(\$80.00)	\$255.00

▼ Payment Plan Details

Responsible Party	1: Test, Michell		
Plan Total	\$	Credit Card	
Installment Amount	\$	Number of Installments	#
Installment Start	01-08-2025	Installment Type	<input checked="" type="radio"/> Monthly <input type="radio"/> Weekly <input type="radio"/> Biweekly
Plan Comments			
Plan Flags	<input 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 patient balance claim(s) you wish to associate with the payment plan.

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

Payment Plan Setup for Patient: 11593 - [REDACTED] . 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: [REDACTED]

Please note that although the selected claim(s) balance will be automatically incorporated into the payment plan total amount, the payment plan details screen will still give users the ability to manually adjust the total 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, if applicable).
2. Select your installment amount or your number of installments.
 1. If you enter an installment amount, the system will calculate and populate the number of installments needed to fulfill the total balance.
 2. If you enter the Number of Installments, the system will calculate the installment amount based on the number 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). This will default to today's date.
4. Select your Installment Type (Monthly, Weekly, or Biweekly).
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. The recurring payment process is a nightly job that will run the credit card transaction for the payment plans that have a credit card on file where the recurring payment flag is set to yes.
 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: 93980 - Test, Michell - 01/01/1990

> Existing Payment Plans - Remaining Total: \$122.00

▼ Patient Balance Claims - \$255.00/\$255.00

#	Claim ID	Claim DOS	Status	Payer	Charges	Payments	Adjustments	Balance
<input checked="" type="checkbox"/>	66422	02/15/2023	Sent, Statement	Aetna Test	\$800.00	(\$465.00)	(\$80.00)	\$255.00

▼ Payment Plan Details

Responsible Party	1: Test, Michell		
Plan Total	\$ 255.00	Credit Card	
Installment Amount	\$ 55.00	Number of Installments	# 5
Installment Start	01-08-2025	Installment Type	<input checked="" type="radio"/> Monthly <input type="radio"/> Weekly <input type="radio"/> Biweekly
Plan Comments			
Plan Flags	<input type="checkbox"/> Recurring payments <input type="checkbox"/> Exclude claims from statements <input type="checkbox"/> Do not send statement		

▼ Payment Plan Installment Summary

#	Due Date	Payment Amount
1	01/08/2025	\$55.00
2	02/08/2025	\$55.00
3	03/08/2025	\$55.00
4	04/08/2025	\$55.00
5	05/08/2025	\$35.00
Total:		\$255.00

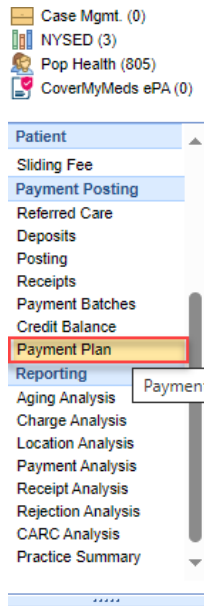
Add Card
Save
Close

Payment Plan Actions

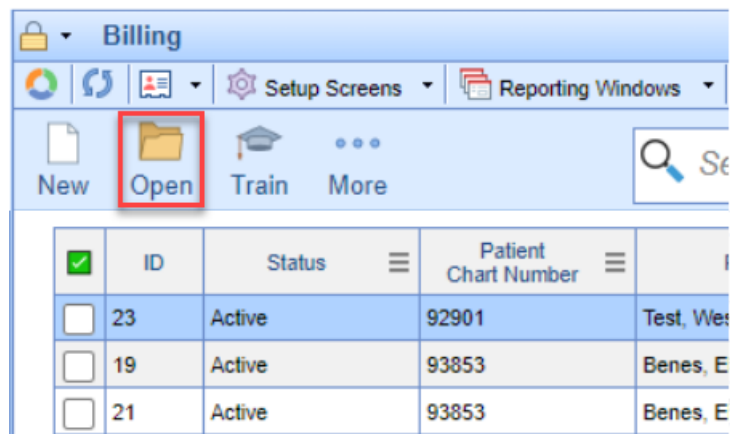
Once you have set up a payment plan, you may find that some edits or updates need to be made to the existing plan. There are various actions you can perform on the existing payment plans from the [Payment Plan Details](#) Screen.

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

Detail Actions

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

Included Payment Plan Balance Claims

#	Claim ID	Claim DOS	Status	Payer	Charges	Payments	Adjustments	Balance
<input type="checkbox"/>	66664	10/19/2023	Rejected	Aetna	\$500.00	\$0.00	\$0.00	\$500.00

Claim Actions

- Remove Claim

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	

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	\$ <input type="text"/>
Total	\$ 200.00
Installment Amount	\$ 16.67
Number of Installments	# 12

Comments

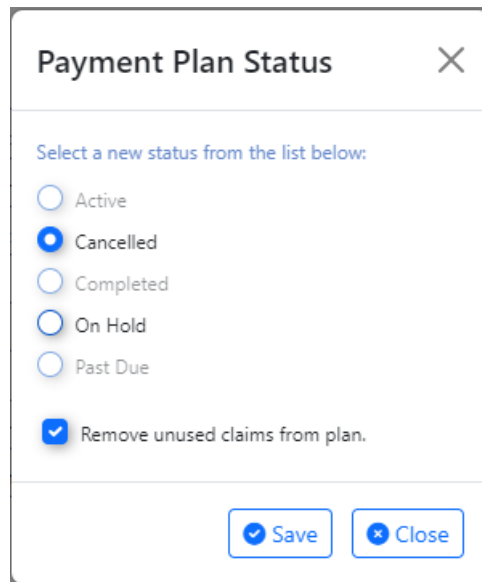
Recurring payments
 Exclude claims from statements
 Do not send statement

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 and up to date with the expected installment payments.
 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 and will not be included in the recurring payment processing.
 5. **Past Due:** The payment plan has an installment that has not been paid in full by the installment due date.
3. Select if you want to remove any unused claims from the plan.



The dialog box is titled "Payment Plan Status" and has a close button (X) in the top right corner. Below the title, it says "Select a new status from the list below:". There are five radio button options: "Active", "Cancelled", "Completed", "On Hold", and "Past Due". The "Cancelled" option is selected. Below these options is a checked checkbox labeled "Remove unused claims from plan.". At the bottom right, there are two buttons: "Save" and "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.



The dialog box is titled "Change Responsible Party" and has a close button (X) in the top right corner. Below the title, there is a dropdown menu with a blue border and a downward arrow. The dropdown is open, showing a list of options. Below the dropdown, there are two buttons: "Save" and "Close".

3. Click **Save**.

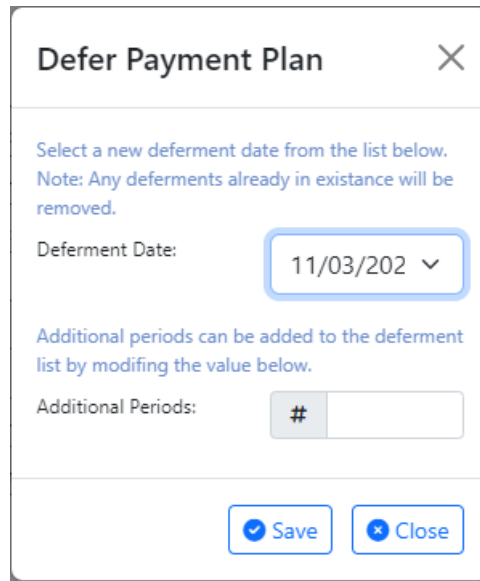
Defer a Payment Plan

You can choose to delay/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 dialog box is titled "Defer Payment Plan" and has a close button (X) in the top right corner. It contains the following text and controls:

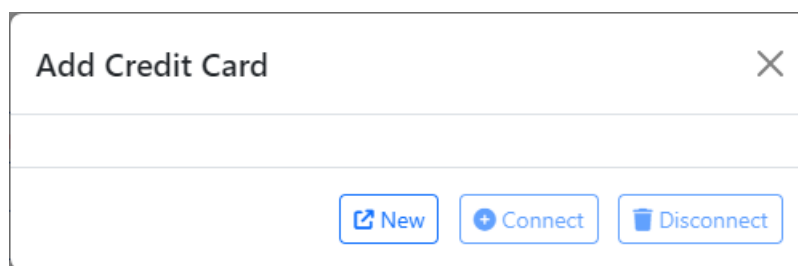
- Text: "Select a new deferment date from the list below. Note: Any deferments already in existence will be removed."
- Label: "Deferment Date:"
- Control: A dropdown menu showing "11/03/202" with a downward arrow.
- Text: "Additional periods can be added to the deferment list by modifying the value below."
- Label: "Additional Periods:"
- Control: A text input field with a "#" icon on the left.
- Buttons: "Save" (with a checkmark icon) and "Close" (with an X icon) at the bottom.

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 dialog box is titled "Add Credit Card" and has a close button (X) in the top right corner. It contains the following controls:

- Buttons: "New" (with a plus icon), "Connect" (with a plus icon), and "Disconnect" (with a trash can icon) at the bottom.