

# Payment Plan Screen

Last Modified on 10/15/2024 5:46 pm EDT

ID	Status	Patient Chart Number	Patient Name	Installment Total	Installment Comment	Plan Total	Total Payments	Remaining Total	Installment	Due Date	Last Payment	Payment Due	Credit Card
23	Active	92901	Pat Name	8		400.00	0.00	400.00	50.00	06/19/2024			*
19	Active	93853	Pat Name	10		5000.00	0.00	5000.00	500.00	06/19/2024		*	
21	Active	93853	Pat Name	10		500.00	0.00	500.00	50.00	06/19/2024			
27	Past Due	93853	Pat Name	7		140.00	12.00	128.00	20.00	06/26/2024	06/26/2024	*	*
26	Active	93853	Pat Name	3		75.00	0.00	75.00	25.00	06/27/2024			
31	Active	92961	Pat Name	12		5000.00	0.00	5000.00	416.67	07/09/2024			
32	Active	92961	Pat Name	10		5000.00	0.00	5000.00	500.00	07/09/2024			
33	Active	47589	Pat Name	13		4999.00	0.00	4999.00	389.00	07/19/2024			
22	Active	93853	Pat Name	10		1000.00	100.00	900.00	100.00	07/19/2024	06/19/2024		*
25	Active	93856	Pat Name	20		1000.00	50.00	950.00	50.00	07/12/2024	06/26/2024		*
24	Past Due	92901	Pat Name	17		425.00	25.00	400.00	25.00	07/12/2024	06/12/2024	*	*
20	Past Due	93853	Pat Name	6		150.00	125.00	25.00	25.00	07/16/2024	07/09/2024	*	*
34	Active	92901	Pat Name	3		150.00	0.00	150.00	50.00	07/17/2024			
36	Active	92901	Pat Name	4		200.00	0.00	200.00	50.00	07/24/2024			
37	Active	92901	Pat Name	5		2200.00	0.00	2200.00	900.00	07/24/2024			
35	Active	94003	Pat Name	2		20.00	0.00	20.00	10.00	07/24/2024			
28	Past Due	93853	Pat Name	8		373.12	50.00	323.12	50.00	07/26/2024	06/26/2024	*	*
30	Active	92901	Pat Name	10		1000.00	100.00	900.00	100.00	08/02/2024	07/02/2024		
29	Active	92901	Pat Name	13		220.00	62.00	138.00	17.00	11/02/2024	07/24/2024		*

The Payment Plan screen can be found in the Billing portal under the Payment Plan category on the navigation bar. This screen by default will display all payment plans that exist currently in any status. In addition, the screen allows you to perform a variety of other tasks including searching, reporting, making changes, and opening existing payment plans.

You can sort your columns by clicking the 3 lines to the right of the column name and selecting your sorting parameters.

## Fields

- **Checkbox:** This box will be used to mark the payment plan(s) as part of the selection.
- **ID:** The payment plan ID#.
- **Status:** The current status of the payment plan.
- **Patient Chart Number:** The patient ID/chart number connected to the payment plan.
- **Patient Name:** The patient name connected to the payment plan.
- **Installment Total:** The total number of installments of the payment plan.
- **Installment Comment:** The payment plan comments.
- **Plan Total:** The adjusted plan total of the payment plan.
- **Total Payments:** The total amount collected on the payment plan.
- **Remaining Total:** The total unpaid amount of the payment plan (Plan Total minus Total Payments).
- **Installments:** The installment amount for each payment on the payment plan.
- **Due Date:** The due date for the payment plan.
- **Last Payment:** The date of the last payment made on the payment plan.
- **Payment Due:** Shows if a payment is due on the payment plan.
- **Credit Card:** Shows if a credit card is on file for the payment plan.

## Advanced Search

The Advanced Search feature allows for the most complicated and specific types of searches. By clicking the Advanced Search button, a panel with search criteria will be displayed on the left-hand side of the screen. Select the criteria that are pertinent, then click the Search button on the panel.

### Advanced Search

▼ **Commonly Used**

ID

Status

Chart Number

▶ **Patient**

▼ **Payment Plan Installment**

Type  N/A  Weekly  Monthly

Total

Current

Remaining

Comment

▼ **Payment Plan Amounts**

Initial Total

Plan Total

Writeoff

Total Payments

Remaining Total

Installment

Last Installment

Last Payment

▼ **Payment Plan Dates**

Due Date

Start Date

End Date

Last Payment

▼ **Payment Plan Flags**

Recurring  N/A  Yes  No

Payment Due  N/A  Yes  No

Credit Card  N/A  Yes  No

Exclude Claims  N/A  Yes  No

## Buttons at the top of the screen

- **New:**
  - The New button will allow you to create a new payment plan for a patient.
    1. Click New and you will be prompted to search and select a patient.

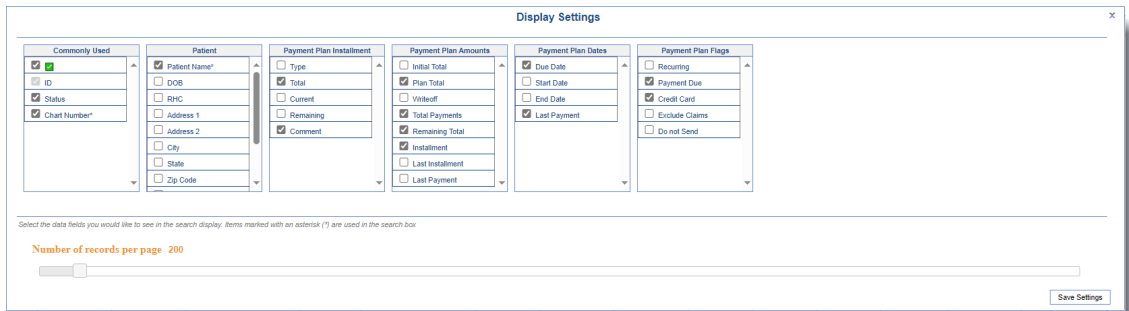
2. The "New Payment Plan" window will be opened and the necessary details can be entered to generate a payment plan.

- **Open button:**

- The Open button will open the [Payment Plan Details](#) screen in a pop-up window for the payment plan selected in the Results Grid.

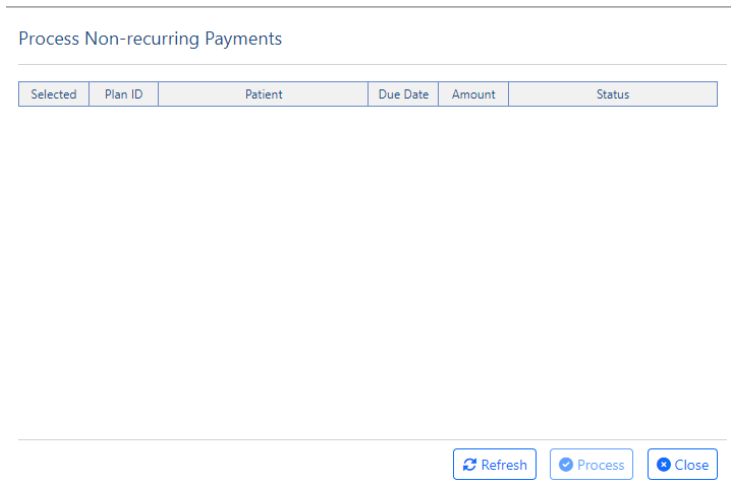
- **More > Change Display Settings:**

- The Change Display settings option allows a user to determine exactly which data points are displayed in the Results Grid. You can also determine the Maximum number of rows that are returned.



- **More > Process Non-Recurring Payments:**

- The Process Non-Recurring Payments option will open a window that lets a user process a payment for a balance that is not included as part of the payment plan.



- **More > Payment Plan Payments Report:**

- The Payment Plan Payments Report option will allow the user to run a report on failed recurring payments for payment plans by a specific date range.

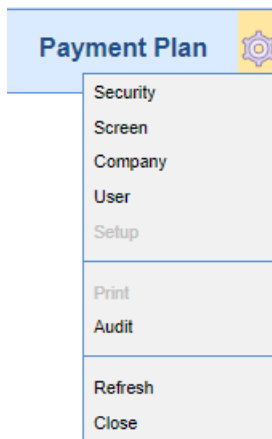
## Payments Report

Date Range:    Errors Only

ID	Total	Installment	Status	Chart	Patient Name	Payment	Payment Date	Local Date	Error	Message	Details
20	\$150.00	\$25.00	Past Due	93853	Benes, Elaine	\$0.00	07/23/2024	07/23/2024 12:00AM (EDT)	true	Payment method token is invalid.	
20	\$150.00	\$25.00	Past Due	93853	Benes, Elaine	\$0.00	07/24/2024	07/24/2024 12:00AM (EDT)	true	Payment method token is invalid.	
20	\$150.00	\$25.00	Past Due	93853	Benes, Elaine	\$0.00	07/25/2024	07/25/2024 12:00AM (EDT)	true	Payment method token is invalid.	
20	\$150.00	\$25.00	Past Due	93853	Benes, Elaine	\$0.00	07/26/2024	07/26/2024 12:00AM (EDT)	true	Payment method token is invalid.	
20	\$150.00	\$25.00	Past Due	93853	Benes, Elaine	\$0.00	07/27/2024	07/27/2024 12:00AM (EDT)	true	Payment method token is invalid.	
20	\$150.00	\$25.00	Past Due	93853	Benes, Elaine	\$0.00	07/28/2024	07/28/2024 12:00AM (EDT)	true	Payment method token is invalid.	
20	\$150.00	\$25.00	Past Due	93853	Benes, Elaine	\$0.00	07/29/2024	07/29/2024 12:00AM (EDT)	true	Payment method token is invalid.	
20	\$150.00	\$25.00	Past Due	93853	Benes, Elaine	\$0.00	07/30/2024	07/30/2024 12:00AM (EDT)	true	Payment method token is invalid.	
20	\$150.00	\$25.00	Past Due	93853	Benes, Elaine	\$0.00	07/31/2024	07/31/2024 12:00AM (EDT)	true	Payment method token is invalid.	
20	\$150.00	\$25.00	Past Due	93853	Benes, Elaine	\$0.00	08/01/2024	08/01/2024 12:00AM (EDT)	true	Payment method token is invalid.	
20	\$150.00	\$25.00	Past Due	93853	Benes, Elaine	\$0.00	08/02/2024	08/02/2024 12:00AM (EDT)	true	Payment method token is invalid.	
20	\$150.00	\$25.00	Past Due	93853	Benes, Elaine	\$0.00	08/03/2024	08/03/2024 12:00AM (EDT)	true	Payment method token is invalid.	
20	\$150.00	\$25.00	Past Due	93853	Benes, Elaine	\$0.00	08/04/2024	08/04/2024 12:00AM (EDT)	true	Payment method token is invalid.	
20	\$150.00	\$25.00	Past Due	93853	Benes, Elaine	\$0.00	08/05/2024	08/05/2024 12:00AM (EDT)	true	Payment method token is invalid.	
20	\$150.00	\$25.00	Past Due	93853	Benes, Elaine	\$0.00	08/06/2024	08/06/2024 12:00AM (EDT)	true	Payment method token is invalid.	
20	\$150.00	\$25.00	Past Due	93853	Benes, Elaine	\$0.00	08/07/2024	08/07/2024 12:00AM (EDT)	true	Payment method token is invalid.	
20	\$150.00	\$25.00	Past Due	93853	Benes, Elaine	\$0.00	08/08/2024	08/08/2024 12:00AM (EDT)	true	Payment method token is invalid.	
20	\$150.00	\$25.00	Past Due	93853	Benes, Elaine	\$0.00	08/09/2024	08/09/2024 12:00AM (EDT)	true	Payment method token is invalid.	
20	\$150.00	\$25.00	Past Due	93853	Benes, Elaine	\$0.00	08/10/2024	08/10/2024 12:00AM (EDT)	true	Payment method token is invalid.	
20	\$150.00	\$25.00	Past Due	93853	Benes, Elaine	\$0.00	08/11/2024	08/11/2024 12:00AM (EDT)	true	Payment method token is invalid.	
20	\$150.00	\$25.00	Past Due	93853	Benes, Elaine	\$0.00	08/12/2024	08/12/2024 12:00AM (EDT)	true	Payment method token is invalid.	

## Gear Icon

The 'Gear' icon located in the upper right-hand corner provides access to some basic settings and options.



- **Security:** This option will open the 'Role Setup' screen which is where you can determine who has access to the window.
- **Screen:** This option is not used here.
- **Company:** This option is not used here.
- **User:** This option will provide access to User Settings related to Payment Plans. Currently, there are none.

- **Setup:** This option is not used here.
  - **Print:** This option is not used here.
  - **Audit:** Receipt auditing is not currently supported from this window.
  - **Refresh:** This option will refresh the window.
  - **Close:** This option is not used here.
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