Creating a New Payment Plan

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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.

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		ID	Status	≡	Patient Chart Number	≡ ।
		23	Active		92901	Test, Wes
		19	Active		93853	Benes, E
		21	Active		93853	Benes, E

3. Select the patient from the patient search window.

Before creating a ne	ew payment plan,	, please supply a	a patient	
Patient		Q]	

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.

	Status	Total	Remaining	Installment	Start	End	Due		Comment	
,	Active	\$30.00	\$22.00	\$2.00	10/17/2024	12/17/2025	02/17/2025			
Co	ompleted	\$270.00	\$0.00	\$70.00	12/03/2024	03/03/2025	03/03/2025			
Pa	ast Due	\$100.00	\$100.00	\$5.00	12/17/2024	07/17/2026	12/17/2024			
Ca	ancelled	\$20.00	\$0.00	\$20.00	12/18/2024	12/18/2024	12/18/2024			
Pa	ast Due	\$5.23	\$0.00	\$5.23	12/18/2024	12/18/2024	12/18/2024			
#	Claim ID 66422	Claim DOS 02/15/2023	; Sent, Statem	Status ent	Aetna Tesi	Payer t	Charges \$800.00	Payments (\$465.00)	Adjustments (\$80.00)	Balanc \$255.
#	Claim ID 66422 - ment Plan	Claim DOS 02/15/2023 Details	Sent, Statem	Status	Aetna Tesi	Payer t	Charges \$800.00	Payments (\$465.00)	Adjustments (\$80.00)	Balance \$255.
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# Payr Resp Plan	Claim ID 66422 - ment Plan ponsible Par	Claim DOS 02/15/2023 Details ty	Sent, Statem	Status ent Michell	Aetna Tesi	Payer t Card	Charges \$800.00	Payments (\$465.00)	Adjustments (\$80.00)	Balanc \$255.
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# Payr Resp Plan Insta	Claim ID 66422 - ment Plan ponsible Par n Total tallment Ama	Claim DOS 02/15/2023 Details ty pount t	Sent, Statem 1: Test, \$ \$ () () () () () () () () () ()	Status ent Michell 11-08-2025	Aetna Tesi Credit (Numbe Installm	Payer t Card er of Installment	Charges \$800.00	Payments (\$465.00)	Adjustments (\$80.00)	Balance \$255.

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.

	Status	Total	Remaining	Installment	Start	End	Due		Comment	
	Active	\$200.00	\$183.33	\$16.67	10/03/2024	09/03/2025	11/03/2024			
ati	ent Balance	Claims - \$	131.58/\$335.	53						
#	Claim ID	Claim DOS	i	Status		Payer	Charges	Payments	Adjustments	Balance
•	<u>33154</u> 🕶	02/01/2018	Sent, Statemer	nt	United He	althcare	\$98.91	\$0.00	(\$33.12)	\$65.79
~	<u>33303</u> 🗸	02/05/2018	Sent, Statemer	nt	United He	althcare	\$98.91	\$0.00	(\$33.12)	\$65.79
	<u>33501</u> 🗸	02/08/2018	Sent, Statemer	nt	United He	althcare	\$98.91	\$0.00	(\$33.12)	\$65.79
	<u>33646</u> 🗸	02/12/2018	Sent, Statemer	nt	United He	althcare	\$98.91	\$0.00	(\$33.12)	\$65.79
	<u>33761</u> 🗸	<u>02/14/2018</u>	Sent, Statemer	nt	United He	althcare	\$98.91	\$0.00	(\$33.12)	\$65.79
	<u>34823</u> 🗸	03/07/2018	Sent, Statemer	nt	United He	althcare	\$98.91	(\$59.21)	(\$33.12)	\$6.58

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.

	Claim ID	Claim DOS		Status	Payer	Charge	Payments	Adjustments	Balance	
✓	<u>66422</u> 🗸	02/15/2023	Sent, Sta	tement	Aetna Test	\$800.	(\$465.00)	(\$80.00)	\$255.00	
Рауі	ment Plan I	Details								
Res	ponsible Part	у	1: Te	est, Michell					~	
Plan	n Total		\$	255.00	Credit Card					
Inst	allment Amo	unt	\$	55.00	Number of Installmen	its	#		5	
Inst	allment Start		#	01-08-2025	Installment Type		O Monthly) Weekly 🔿 B	iweekly	
Plan	n Comments									
Plan	n Flags		C Re	curring payments	Exclude claims from stat	ements 🗌	Do not send sta	tement		
Рауі	ment Plan I	nstallment S	ummar	у						
	#	Due D	ate	Payment Amo	ount					
	1	01/08/2	025		\$55.00					
	2	02/08/2	025		\$55.00					
	3	03/08/2	025		\$55.00					
	4	04/08/2	025		\$55.00					
	5	05/08/2	025		\$35.00					