

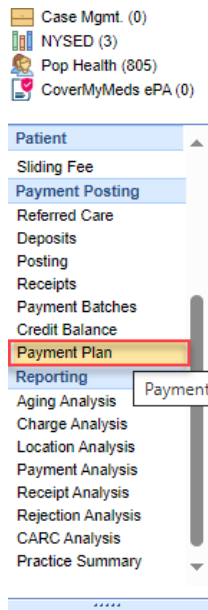
Creating a New Payment Plan

Last Modified on 10/15/2024 2:04 pm EDT

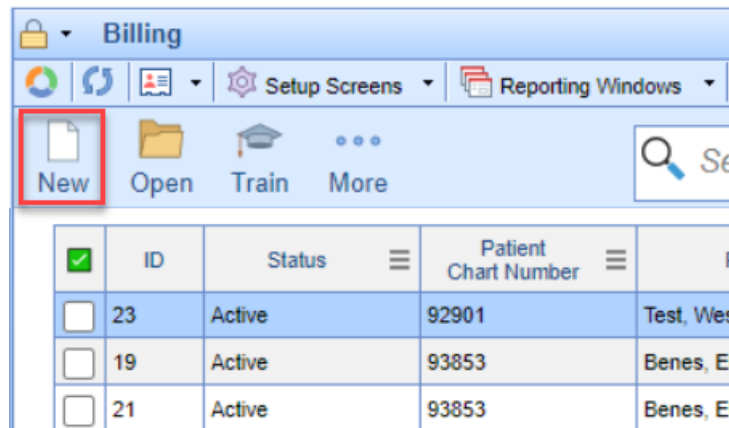
The Payment Plan Window allows users to create a new [payment plan](#) in the application allowing patients to pay high balances over time.

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 - 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

#	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 - [View History](#) - 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"/>	33561	02/09/2018	Sent, Statement	United Healthcare	\$98.91	\$0.00	(\$33.12)	\$65.79
<input checked="" type="checkbox"/>	33846	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 [Redacted]		
Plan Total	\$ 131.58	Credit Card	
Installment Amount	\$ 21.93	Number of Installments	# 6
Installment Start	10-14-2024	Installment Type	<input checked="" type="radio"/> Monthly <input type="radio"/> Weekly
Plan Comments	<div style="border: 1px solid #ccc; height: 20px;"></div>		
Plan Flags	<input checked="" type="checkbox"/> Recurring payments <input type="checkbox"/> Exclude claims from statements <input type="checkbox"/> Do not send statement		

> Payment Plan Installment Summary

Add Card Save Close