

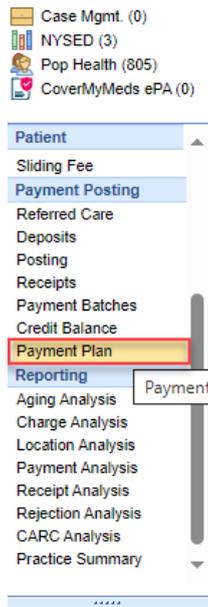
Payment Plan Actions

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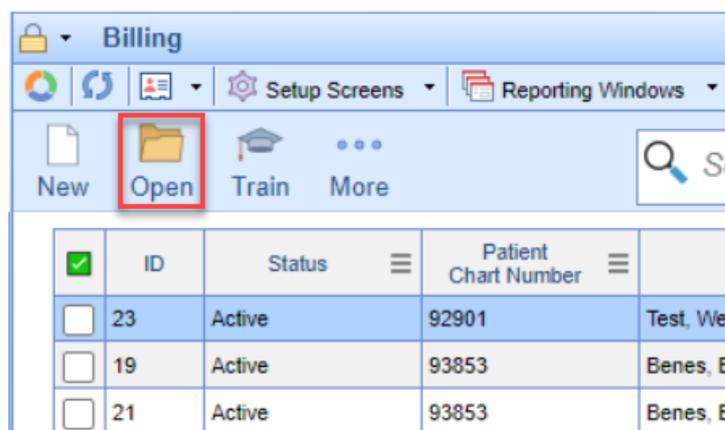
Once you have set up a payment plan, you may find that some edits or updates need to be made to the existing plan. There are various actions you can perform on the existing payment plans from the [Payment Plan Details Screen](#).

Payment Plan Actions

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



2. 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.



3. 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 \$

Total \$ 200.00

Installment Amount \$ 16.67

Number of Installments # 12

Comments

Recurring payments

Exclude claims from statements

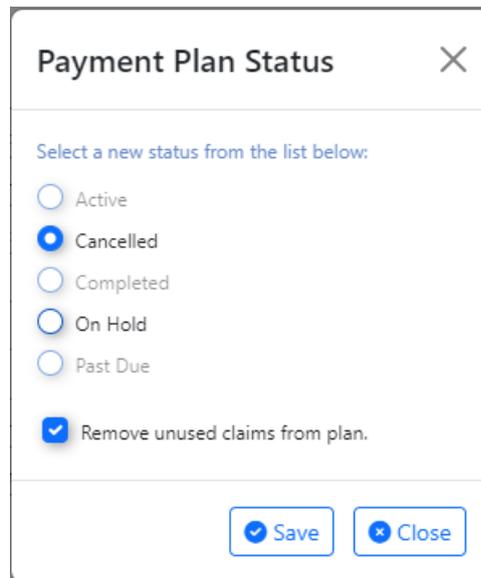
Do not send statement

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 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**.

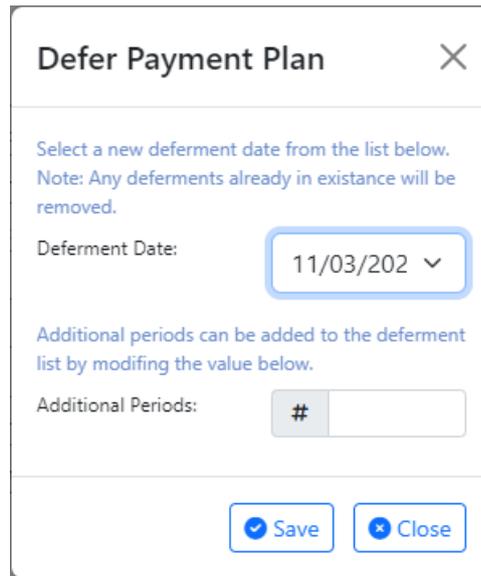
Defer a Payment Plan

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 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:

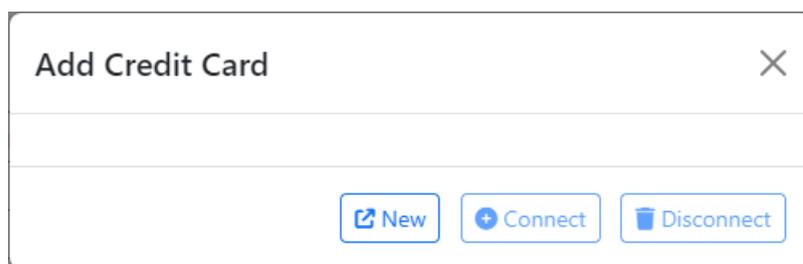
- Text: "Select a new deferment date from the list below. Note: Any deferments already in existence will be removed."
- Label: "Deferment Date:" followed by a dropdown menu showing "11/03/202" with a downward arrow.
- Text: "Additional periods can be added to the deferment list by modifying the value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

- "New" (with a plus icon)
- "Connect" (with a plus icon)
- "Disconnect" (with a trash can icon)