

Release 24.120 - October 17th, 2024

Last Modified on 10/15/2024 7:52 pm EDT

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New Features and Updates

Introducing Our New Payment Plans Feature

We are pleased to introduce our new Payment Plan option to collect patient payments. Payment Plans allow patients to make arrangements to pay off high outstanding balances over an extended period of time. Placing a patient on a payment plan may considerably enhance the likelihood of the bill being paid, due to the ease of charging an agreed-upon amount each billing cycle until the full balance is paid.

We recommend that the practice or office establish its own standard operating procedures as "best practices" or guidelines when creating payment plans, based on its personnel, existing practices, and preferences. The practice is responsible for establishing its own allowed eligibility criteria, plan options, and payment options.

Getting started is easy once your practice administrator has set up the required roles in the setup portal. Once granted access, users can begin using the payment plans feature by following these steps:

Configure Company Settings

As a practice, you are responsible for updating the following settings from **Setup > Company Settings** to meet your business needs.

1. **Payment Plan - Max. Payment Plan Dollar Amount:** Determines the payment plan's total maximum dollar amount allowed. If your practice does not wish to implement a maximum dollar amount for payment plans, this setting should remain 0 = Disabled.
2. **Payment Plan - Min. Payment Plan Dollar Amount:** Determines the payment plan's minimum dollar amount allowed. If your practice does not wish to implement a minimum dollar amount for payment plans, this setting should remain 0 = Disabled.
3. **Payment Plan - Max. Installments Months:** Determines the payment plan's maximum number of months that the installment payments can be configured for. This setting will look at the payment plan installment Start and End Date to determine if it's allowed or not.
4. **Payment Plan - Min. Installments Months:** Determines the payment plan's minimum number of months that installment payments can be configured for. This setting will look at the payment plan installment Start and End Date to determine if it's allowed or not.
5. **Payment Plan - Allow Recurring Payments:** Determines if recurring payments are allowed for payment plans. When turned on, this company setting will allow recurring payments for payment plans.
6. **Payment Plan - Minimum last payment:** Determines the minimum payment allowed as the last installment payment. If the amount for the last installment payment is less than this value, the amount will automatically be added to the first payment instead.

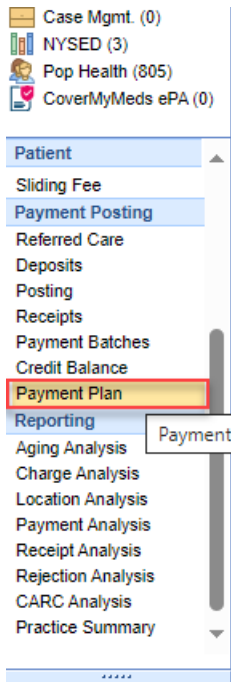
The screenshot shows a software interface titled "Setup: Company Settings". A search bar contains the text "payment plan". Below the search bar, a table lists six search results. The table has three columns: the first column contains the word "Payment Plan" repeated six times; the second column contains the specific setting names; and the third column contains the values for each setting. At the bottom left of the table area, it says "6 results".

Setting	Value
Payment Plan - Allow Recurring Payments.	Yes
Payment Plan - Max. Installments Months.	12
Payment Plan - Max. Payment Plan Dollar Amount.	200
Payment Plan - Min. Installments Months.	0
Payment Plan - Min. Payment Plan Dollar Amount.	0
Payment Plan - Minimum last payment.	5

For more information on these settings, visit our [Payment Plan Setup Setup](#) document.

Navigating Your Payment Plan Screen is easy

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 currently exist in any status. In addition, the screen allows you to perform a number of additional tasks including searching, reporting, making changes, and opening existing payment plans. Here are some of the payment plan screen fields.

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	...	8		400.00	0.00	400.00	50.00	06/19/2024			
19	Active	93853	...	10		5000.00	0.00	5000.00	500.00	06/19/2024			
21	Active	93853	...	10		500.00	0.00	500.00	50.00	06/19/2024			
27	Past Due	93853	...	7		140.00	12.00	128.00	20.00	06/26/2024	06/26/2024		
26	Active	93853	...	3		75.00	0.00	75.00	25.00	06/27/2024			
31	Active	82961	...	12		5000.00	0.00	5000.00	416.67	07/09/2024			
32	Active	82961	...	10		5000.00	0.00	5000.00	500.00	07/09/2024			
33	Active	47569	...	13		4999.00	0.00	4999.00	399.00	07/16/2024			
22	Active	93853	...	10		1000.00	100.00	900.00	100.00	07/16/2024	06/10/2024		
25	Active	93858	...	20		1000.00	50.00	950.00	50.00	07/12/2024	06/26/2024		
24	Past Due	92901	...	17		425.00	25.00	400.00	25.00	07/12/2024	06/12/2024		
20	Past Due	93853	...	6		150.00	125.00	25.00	25.00	07/15/2024	07/06/2024		
34	Active	92901	...	3		150.00	0.00	150.00	50.00	07/17/2024			
36	Active	92901	...	4		200.00	0.00	200.00	50.00	07/24/2024			
37	Active	92901	...	5		2200.00	0.00	2200.00	500.00	07/24/2024			
35	Active	94003	...	2		20.00	0.00	20.00	10.00	07/24/2024			
28	Past Due	93853	...	8		373.12	50.00	323.12	50.00	07/26/2024	06/26/2024		
30	Active	92901	...	10		1000.00	100.00	900.00	100.00	08/02/2024	07/02/2024		
29	Active	92901	...	13		220.00	82.00	138.00	17.00	11/02/2024	07/24/2024		

- ID:** The payment plan ID number.
- Status:** The current status of the payment plan.
- Installment Total:** The total number of installments of the payment plan.
- Plan Total:** The adjusted plan total of the payment plan.
- Installments:** The installment amount for each payment on the payment plan.
- Advanced Search:** Used to open the payment plan advanced search window.

1. 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 pertinent criteria, then click the Search button on the panel.

The screenshot shows the 'Advanced Search' window with the following sections and fields:

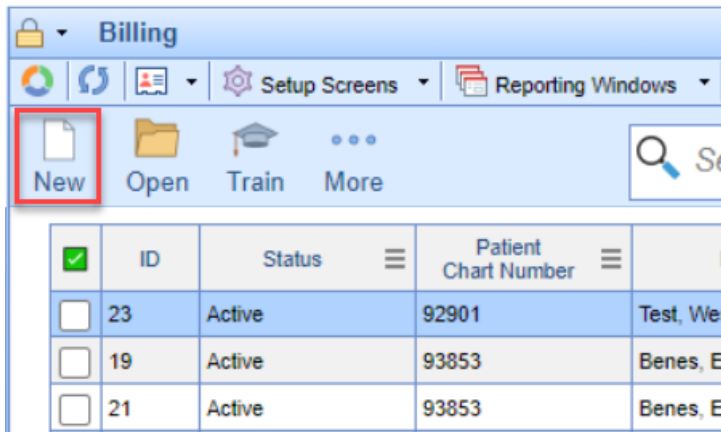
- Commonly Used**
 - ID:
 - Status:
 - Chart Number:
- Patient** (collapsible)
- Payment Plan Installment**
 - Type: N/A Weekly Monthly
 - Total:
 - Current:
 - Remaining:
 - Comment:
- Payment Plan Amounts**
 - Initial Total:
 - Plan Total:
 - Writeoff:
 - Total Payments:
 - Remaining Total:
 - Installment:
 - 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

At the bottom of the window are three buttons: 'Clear Fields', 'Refresh Lists', and 'Search'.

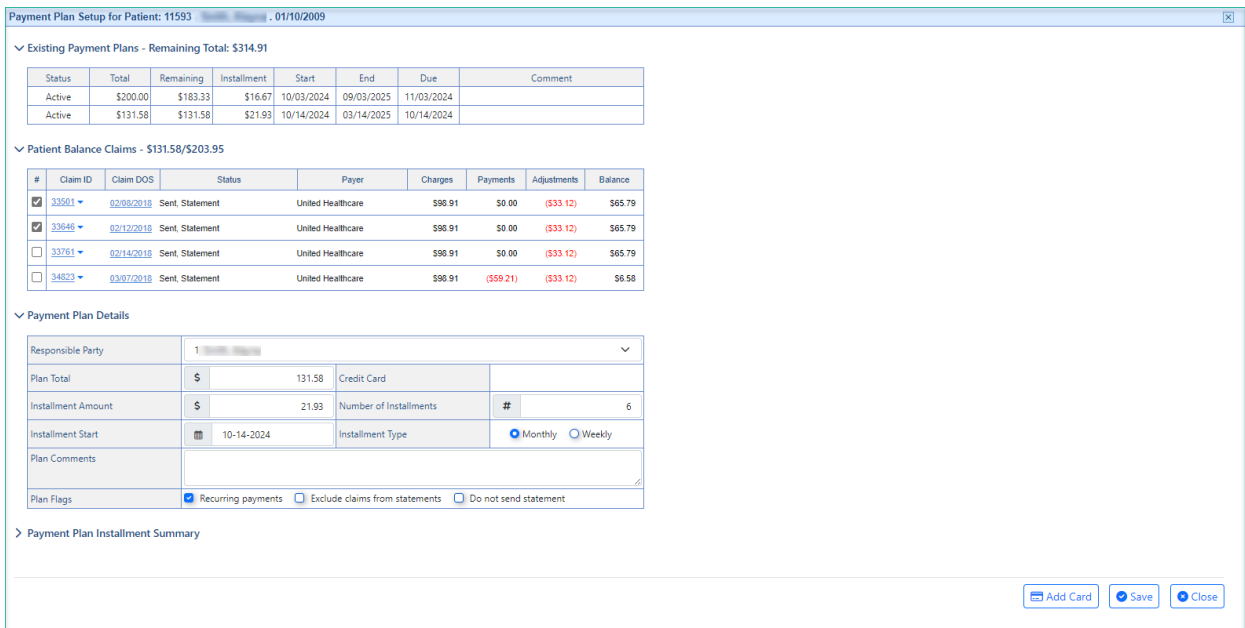
For a complete list of fields or more information on the Payment Plan or Advanced Search windows, click [here](#).

Creating Payment Plans

Creating a payment plan can be done by selecting the "New" button at the top of the payment plan screen.



Once your patient is selected, the New Payment Plan window will be displayed.



This window includes 4 sections:

Existing Payment Plans - This section allows users to view any current payment plans the patient already has in place.

1. **Patient Balance Claims** - This section displays any outstanding patient claim balances and allows you to choose which claims or balances you wish to associate with the payment plan. It includes checkboxes to the left of the existing balances used to select the claims you want to include in your payment plan.

Payment Plan Setup for Patient: 11593 - **Health Plan** - 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

- Payment Plan Details** - This section allows users to set up a new payment plan by entering their payment plan details (installment amounts, number of installments, dates, recurring payments, etc.).
- Payment Plan Installment Summary** - This section will appear after the payment plan is created and displays the payment plan's installment number, due date, and payment amounts.

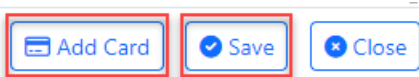
Payment Plan Details

Responsible Party	1: Smith, Alayna		
Plan Total	\$ 131.58	Credit Card	
Installment Amount	\$ 21.93	Number of Installments	# 6
Installment Start	10-15-2024	Installment Type	<input checked="" type="radio"/> Monthly <input type="radio"/> Weekly
Plan Comments			
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

#	Due Date	Payment Amount
1	10/15/2024	\$21.93
2	11/15/2024	\$21.93
3	12/15/2024	\$21.93
4	01/15/2025	\$21.93
5	02/15/2025	\$21.93
6	03/15/2025	\$21.93
Total:		\$131.58

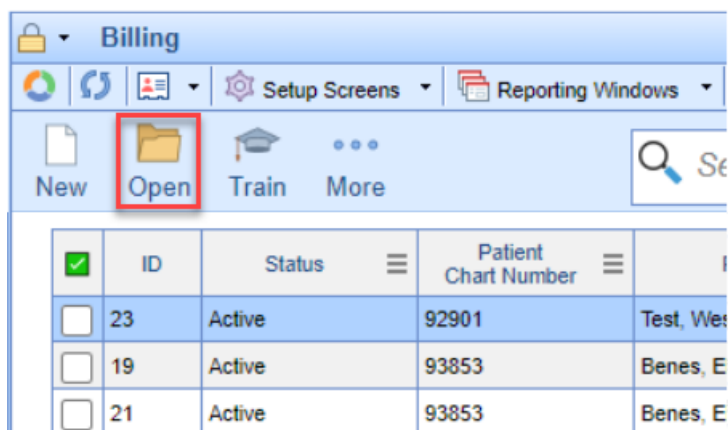
Once you've entered all your payment plan details, you can add a patient credit card on file by selecting the "Add Card" option at the bottom of the screen. This will link the card to the payment plan allowing it to be used for recurring or manual processing. Otherwise, you can click "Save" to save the payment plan.



Additional 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 several actions you can take on the existing payment plans from the [Payment Plan Details Screen](#).

To get to the Payment Plan Details Screen, highlight the desired payment plan from the list and select the "Open" button at the top of the payment plan screen. Alternatively, you can double-click the payment plan from the list to open it.



Once you select your payment plan, the Payment Plan Details window will appear, containing buttons under the **Detail Actions** section.

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	

Within the **Detail Actions** section, you can choose the preferred action from the options provided.

- Update Plan:** The Update Payment Plan screen allows you to apply any desired edits or updates to the payment plan.
 - Enter any applicable write-off or adjustment.
 - Edit the total amount due.
 - Edit the installment amount.
 - Edit the number of installments.
 - Enter any payment plan comments.
 - Select any payment plan flag(s)
 - Recurring Payment:** This will flag the payment plan for the recurring payment process.
 - Exclude claims from statements:** This will exclude the selected claims from being included in the patient's statement.
 - 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

2. **Update Status:** The **Payment Plan Status** screen allows you to update your payment plan's status from a list of options.

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.

Payment Plan Status ✕

Select a new status from the list below:

Active

Cancelled

Completed

On Hold

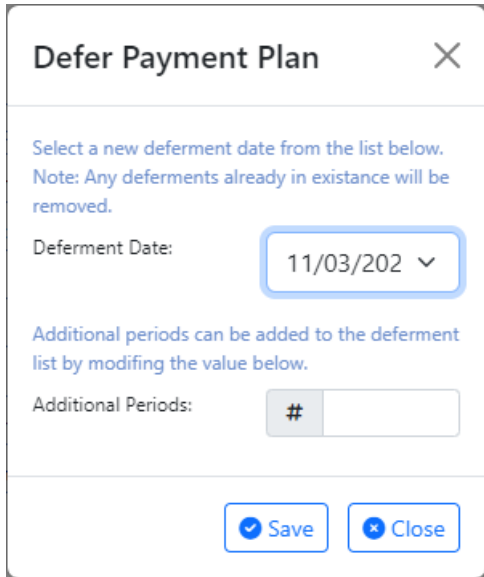
Past Due

Remove unused claims from plan.

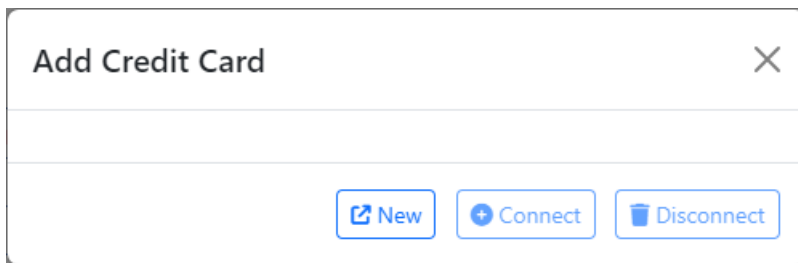
3. **Resp. Party:** The **Change Responsible Party** screen allows you to update the responsible party from a list of options (if available).



4. **Deferment:** The **Defer Payment Plan** screen allows you to delay or "defer" a payment until a future date.

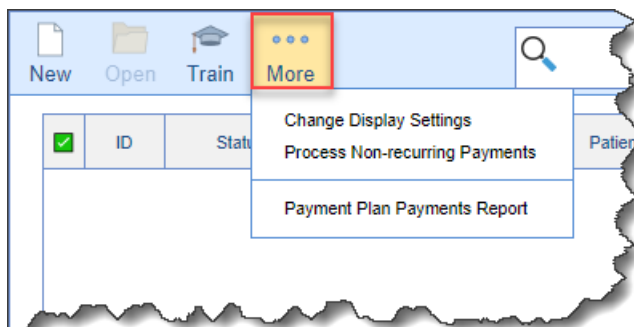


5. **Add Card:** The **Add Credit Card** screen allows you to save a new or existing patient credit card and associate it with the payment plan for recurring and/or manual processing.

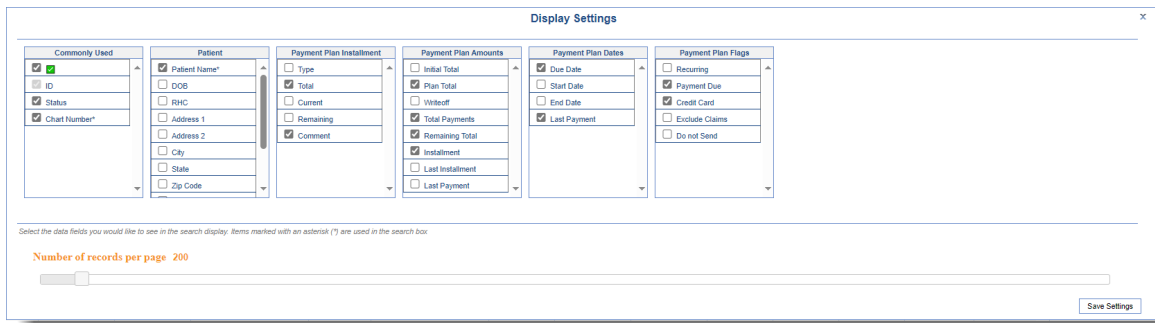


More Options

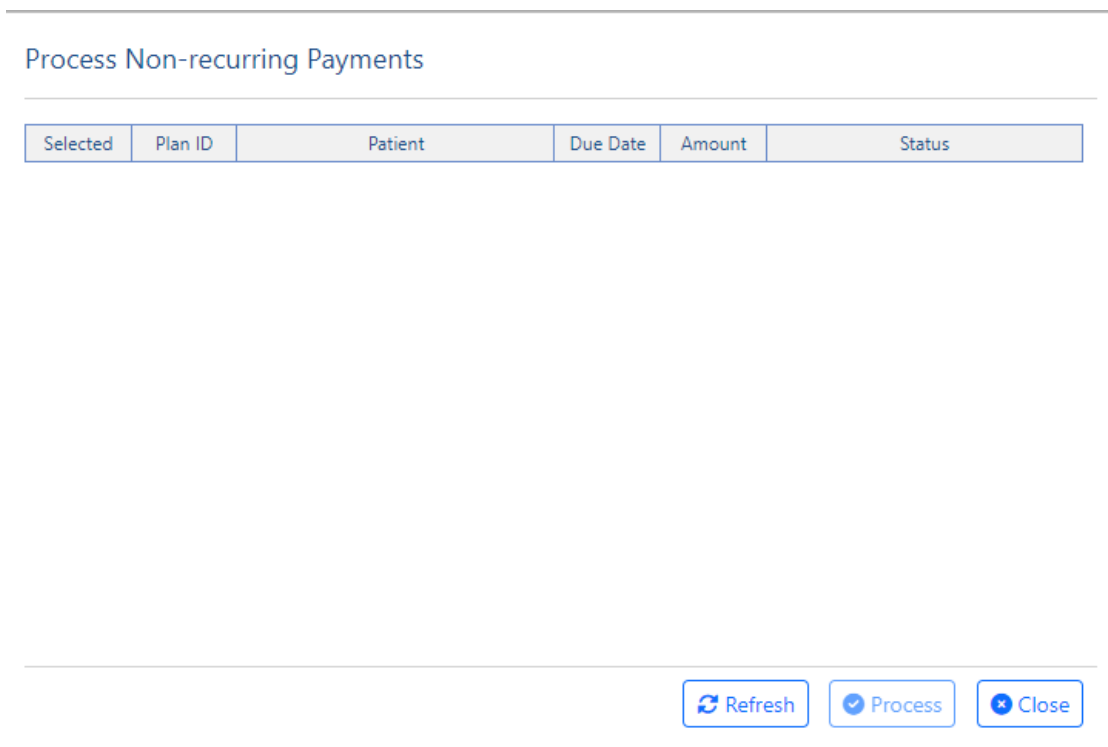
Choosing the **"More"** option at the top of the Payment Plan window presents the user with the following alternatives.



1. **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 for payment plans.



2. **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.



3. **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.	

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Quick Pay

- U15600 - Payment Plans - Option Added to The Quick Pay Window: In the Quick Pay window, we've added a new option that allows users to either select an existing payment plan to link the payment to, or create a new payment plan.

Service Location *

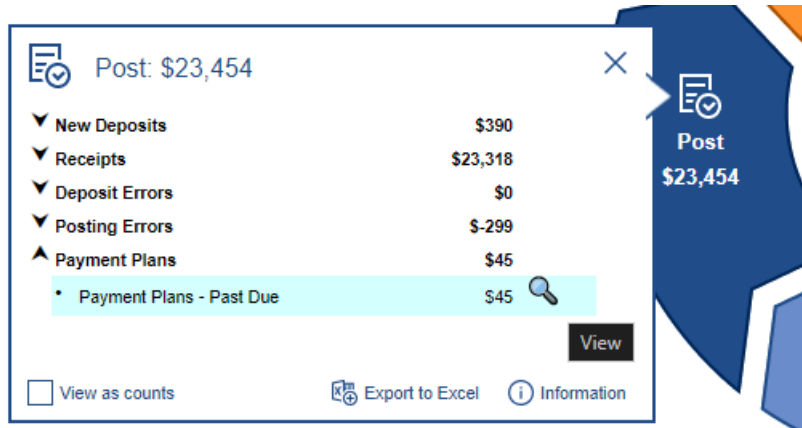
Payment Plan

ID	Date	Total	Installment	Card	Comment
14	11/03/2024	\$200.00	\$16.67	No Card	
15	10/14/2024	\$131.58	\$21.93	No Card	

Billing

Revenue Cycle Wheel

- U16371 - Add Past Due Payment Plans to the Revenue Cycle wheel: Updated the "Post" section of the revenue cycle wheel to include past due Payment Plans. This will display the total of Past Due Payment Plans, either as a dollar amount or payment plan count, depending on the user view selection. When the user clicks the drill-down option, it will link to the Payment Plan window, displaying the Past Due Payment Plans.



Payment Posting



- U15601 - Payment Plans - Option Added to The Credit Card Payment Window: Within the Credit Card Payment window, we included a new option to select an existing payment plan or add a new one. This allows users to choose an existing payment plan or click "New" to create a new payment plan directly from the Credit Card Payment window.

For more information on associating or adding a payment plan from the credit card window click [here](#).

Deposits

- U10763 - New Option To Enter Remark Codes On EOB Deposits: Added an option for users to enter Remark codes (RARC) on manual EOB deposit claims. Within the Deposit Claims (Billing > Deposits) we have a new section that shows any existing remarks and a + button that enables users to edit or add new remarks.

▼ Claim Procedures 1 total procedures, 1 displayed, All are linked

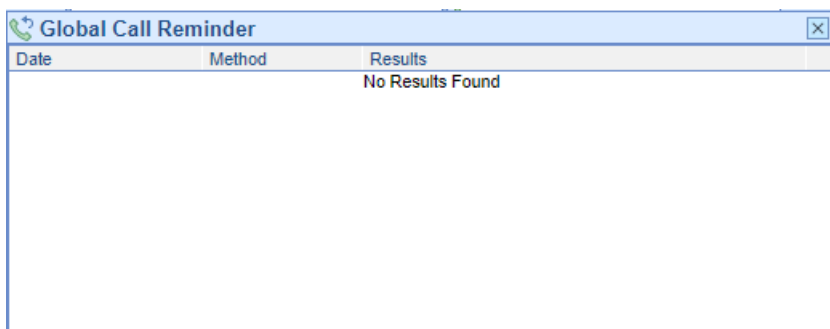
Code	Units	Charged	Paid	Allowed (B6)	Deductible (PR-1)	Coins (PR-2)	CoPay (PR-3)	Group	Reason	Adjustment	Payment Type	Actions	Balance
99213	1	\$500.00	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	▼		<input type="text" value="\$0.00"/>		 	\$499.00 ▲
DOS: 09/02/2024				● Remarks: M25									

Bug Fixes

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Appointments

- B18502 - Missing Appointment Reminder History: Corrected an issue within appointments where right-clicking and selecting the Global Call Reminders option did not display any appointment reminder history in certain scenarios. This was due to a lag in the reminder history retrieval process from Updax. To resolve this, we have implemented a 10-minute delay in our retrieval process, allowing Updax sufficient time to complete the processing of the reminder history before we attempt to retrieve it.



Global Call Reminder

Date	Method	Results
No Results Found		