

Quick Pay Window

Last Modified on 03/12/2025 1:08 pm EDT

Quick Pay Window Overview

The Quick Pay window is typically utilized during the Check In/Out process. However, this window has several areas it can be accessed from and its purpose is to allow the documentation or review of payment, claim entry, orders, prescriptions, letter, print queue, demographics, eligibility, intakes, photograph, insurance card image, and authorizations for the patient.

The Quick Pay window view may alternate between users as its settings are customizable. [Click here](#) to review the settings that alter the Quick Pay window view.

The screenshot displays the Quick Pay window for patient 93980-Test, Michell. The interface includes a navigation bar with tabs for Receipt, Claim, Order, Rx, Letter, Print, Patient, Elig, Intake, ID, and Auth. The Patient Balance is \$914.00. The Appointment Details section shows a table with columns for ID, Date & Time, Resource Name, Primary Care Physician (None Reported), and Service Location. Below this are buttons for Transaction History, Payments, Validate, and Refresh Charges. The Insurance Information section contains a table with columns for Coverage, Payer (Aetna Test), Insured ID (00123154584), Group/Policy Number (0357159789640123), and Copay (\$0.00). The New Receipt Detail section features a form with fields for Amount (0.00), Paid By ((1) Michell Test), Type (Co-Pay), Method, ID #, and Comment. It also includes checkboxes for Associated with Claim, Include Comment, Include Diagnosis, and Include Procedure, along with a Create Receipt button. The Receipt Transactions section shows a table with columns for Amount Paid (\$10.00), Post Date (02/27/2025), Paid By (Michell Test), Type (Co-Pay), Method (Credit Card), ID #, Comment, and User ID (Imichell). At the bottom, there are buttons for Reverse Receipt, Print Receipt, Quick Statement, E-Receipt, and Refresh, with a Receipt Total of \$10.00.

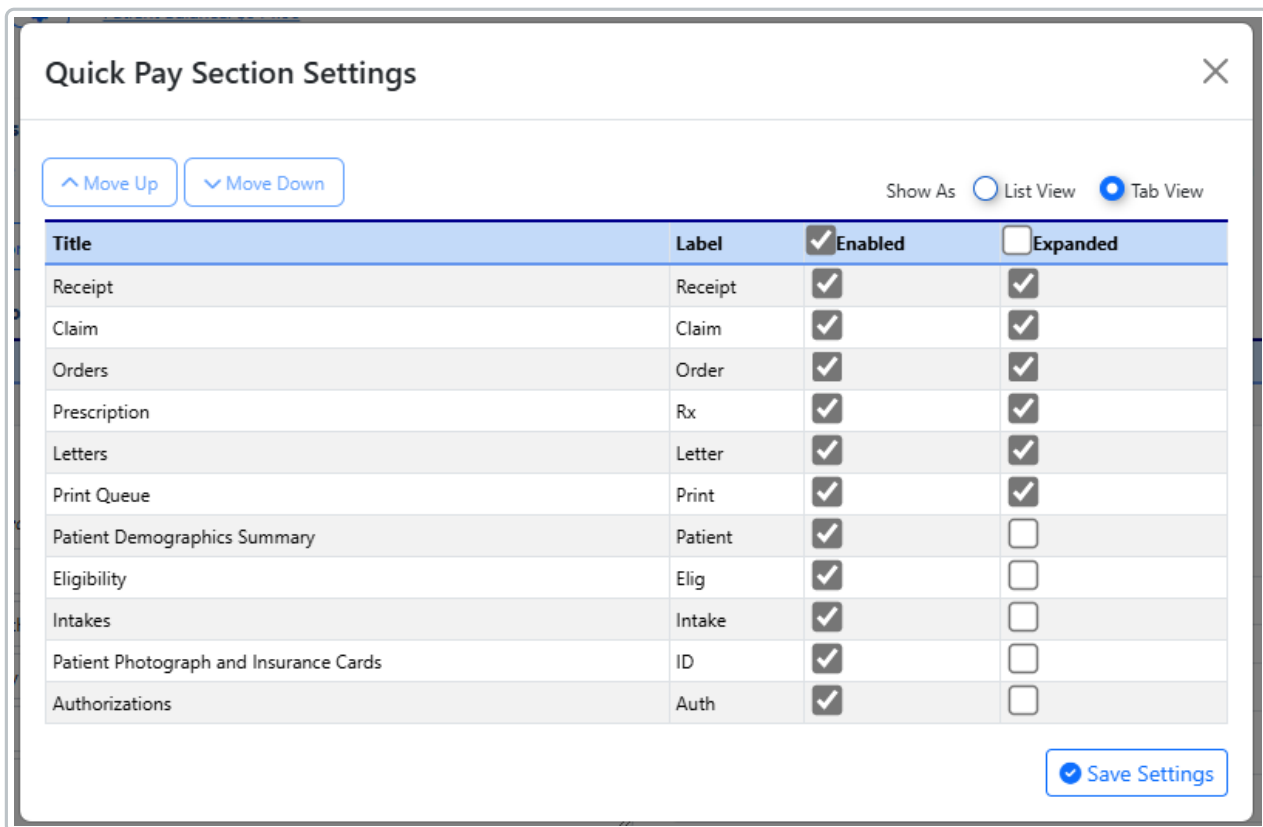
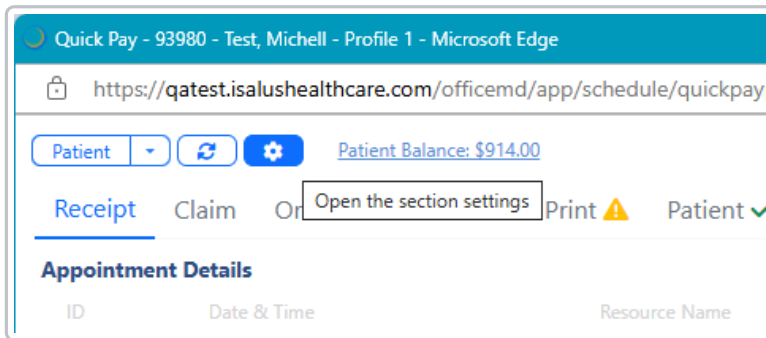
Coverage	Payer	Insured ID	Group/Policy Number	Copay
1	Aetna Test	00123154584	0357159789640123	\$0.00

Amount Paid	Post Date	Paid By	Type	Method	ID #	Comment	User ID
\$10.00	02/27/2025	Michell Test	Co-Pay	Credit Card			Imichell

Quick Pay Window Settings

The Quick Pay window settings allow a user to determine which of the available tabs/sections they want to display and then, when in List View, which of those sections should be expanded.

To access the setting, click the gear (third button) button on the left upper corner of the Quick Pay window.



Users can determine what type of display they prefer: List View or Tab View (see example section at the bottom of this page):

- Tab View where only one section at a time will display.
- List View, where the sections allow continuous scrolling.

Quick Pay settings:

- Move Up button allows the user to move the selected tab/section up in the order it is displayed.
- Move Down button allows the user to move the selected tab/section down in the order it is displayed.
- Show As toggle allows the view change of the Quick Pay window.
- Enabled checkboxes allows the selection of the tab/section to display on the Quick Pay window for the

user.

- Expanded checkboxes allows the selection of the sections that should be expanded when the Quick Pay window is opened as List View.
- Save Settings button allows the user to save the selected settings.

Quick Pay - 93980 - Test, Michell - Profile 1 - Microsoft Edge

https://qatest.isalushealthcare.com/officemd/app/schedule/quickpaypatient/1501/300015?timestamp=1740783129240&u1=lmichell&u2=838792E3CCA847E...

Patient Balance: \$914.00

93980-Test, Michell 01-Jan-1990 (35y)

Receipt | Claim | Order | Rx | Letter | Print | Patient | Elig | Intake | ID | Auth

Appointment Details

ID	Date & Time	Resource Name	Primary Care Physician	Service Location
			None Reported	

Transaction History | Payments | Validate | Refresh Charges

Insurance Information

Coverage	Payer	Insured ID	Group/Policy Number	Copay
1	Aetna Test	00123154584	0357159789640123	\$0.00

New Receipt Detail

Appointment Estimated Balance: \$0.00. No appointment, unable to calculate

Amount *

Paid By * (1) Michell Test

Type * Co-Pay Method *

ID #

Comment

Associated with Claim Include Comment

Include Diagnosis Include Procedure

Create Receipt

Service Location * Search

Payment Plan Search

1 Active 3 Past Due

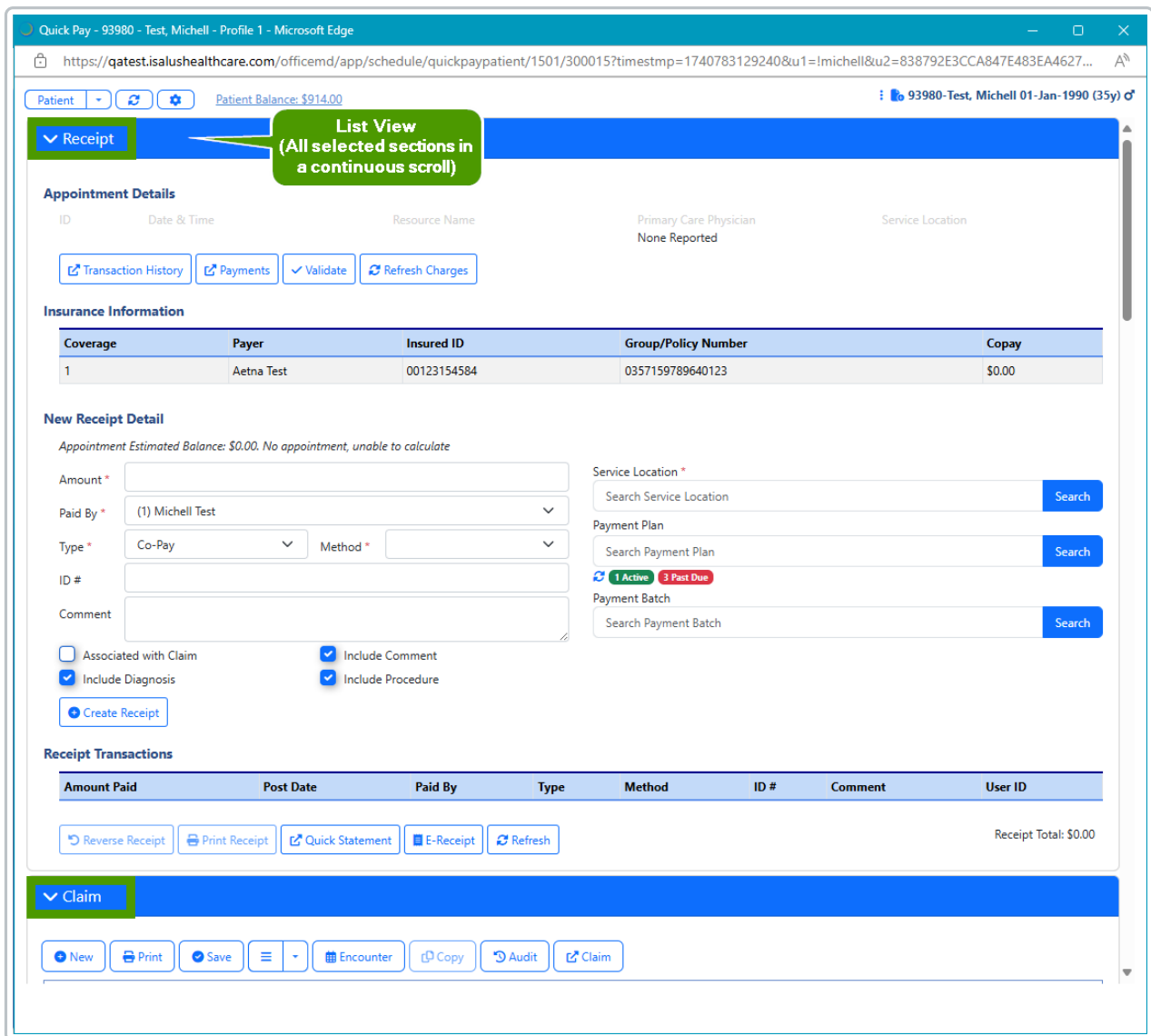
Payment Batch Search

Receipt Transactions

Amount Paid	Post Date	Paid By	Type	Method	ID #	Comment	User ID
-------------	-----------	---------	------	--------	------	---------	---------

Reverse Receipt | Print Receipt | Quick Statement | E-Receipt | Refresh

Receipt Total: \$0.00

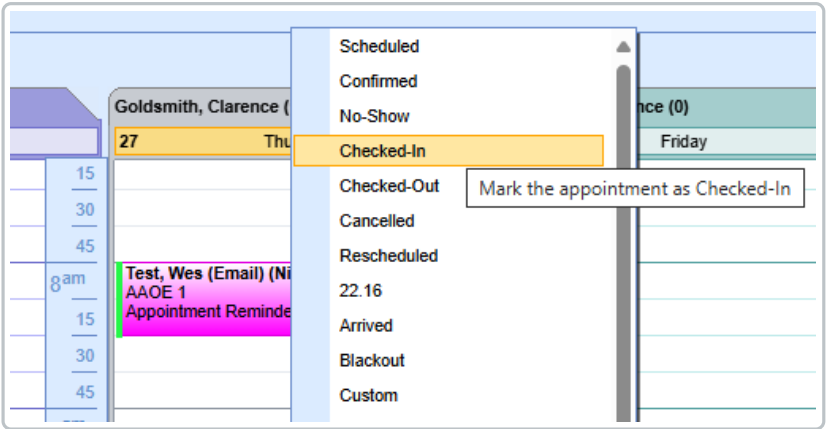


Accessing the Quick Pay Window

The Quick Pay window can be accessed from several places. Below are the different places a user will typically access the Quick Pay window from.

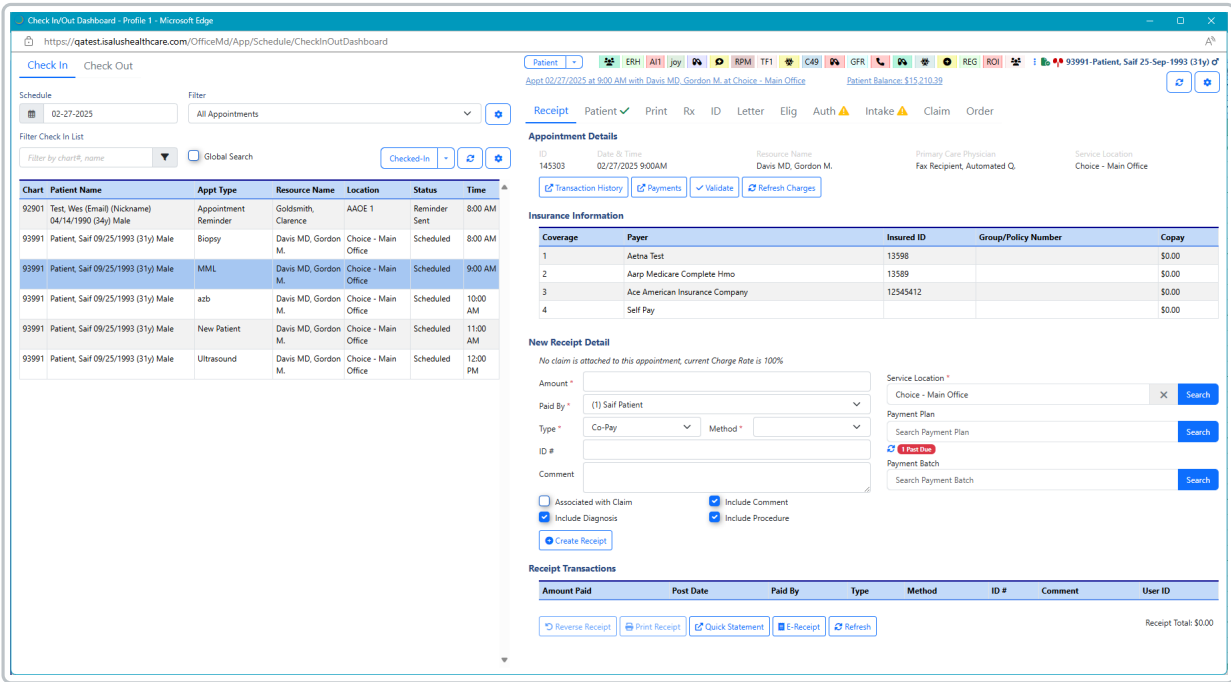
[Appointment status change:](#)

Based on the appointment status change settings (typically check in/out) of your database the Quick Pay window may be set to open. This means that when you right click on an appointment on the iScheduler and click check in as an example the Quick Pay window will open.



Check In/Out Dashboard:

The Check In/Out Dashboard also has the Quick Pay window embedded into it. That means that any time you select a patient within the Check In/Out Dashboard you are viewing the Quick Pay window.



Patient Setup:

From time to time you may need to access the Quick Pay window for a patient without the patient having an appointment. This can be done by going to the Patient Setup and opening the Quick Pay from the More drop down.

Quick Pay Tabs/Sections Overview

The Quick Pay window contains multiple tabs/sections that can be displayed based on the [Quick Pay Settings](#). Below is a brief overview of each tab/section of the Quick Pay window.

Receipt:

The Receipt tab of the Quick Pay will allow the documentation of a patient payment (co-pay, general payment, payment plan, etc...), the printing of a patient receipt, and the validation of a patient's demographics.

Quick Pay - 93858 - Knievel, Evel (Text) - Profile 1 - Microsoft Edge
 https://qatest.isalushealthcare.com/officemd/app/schedule/quickpaypatient/1501/297641?timestamp=1740681722390&u1=Imichell&u2=558DB8BD65974C8891F... A

Patient Patient Balance: \$5423.09 93858-Knievel, Evel (Text) 01-Dec-1951 (73y)

Receipt Claim Order Rx Letter Print Patient ✓ Elig Intake ID Auth

Appointment Details

ID	Date & Time	Resource Name	Primary Care Physician	Service Location
			Goldsmith, Clarence	

Transaction History Payments Validate Refresh Charges

Insurance Information

Coverage	Payer	Insured ID	Group/Policy Number	Copay
1	Ace American Insurance Company	12312312		\$20.00

New Receipt Detail

Appointment Estimated Balance: \$0.00. No appointment, unable to calculate

Amount *

Paid By * (1) Evel Knievel

Type * Co-Pay Method *

ID #

Comment

Associated with Claim
 Include Diagnosis
 Include Comment
 Include Procedure

Service Location * Search

Payment Plan Search

4 Past Due

Payment Batch Search

Create Receipt

Receipt Transactions

Amount Paid	Post Date	Paid By	Type	Method	ID #	Comment	User ID
Receipt Total: \$0.00							

Reverse Receipt Print Receipt Quick Statement E-Receipt Refresh

Claim:

The Claim tab of the Quick Pay window allows the entry of a new charge for the patient. You can also view existing charge entries as well.

Quick Pay - 93980 - Test, Michell - Profile 1 - Microsoft Edge

https://qatest.isalushealthcare.com/officemd/app/schedule/quickpaypatient/1501/300015?timestamp=1740758167464&u1=Imichell&u2=EB1011119B8348...

Patient Balance: \$914.00 93980-Test, Michell 01-Jan-1990 (35y)

Receipt Claim **Order** Rx Letter Print Patient Elig Intake ID Auth

Order #: 114967

Arranged By: Patient

Test, Michell Male Next Appt: 03/03/2025 12:00PM Age: 35y

Scheduling Follow-up office visit in 6 months

Follow-up office visit in 6 months

Test, Michell Choice - North
Male, Next Appt: 03/03/2025 12:00PM 02/26/2025

Priority: Normal.

Appointment: Follow-up Visits at 02/26/2025 00:00am.

Processor: Front Office (Open)

Rendering: McKenna, Daniel **Referring:** **ICD:**

Responsible: Test, Michell **Insurance:** **Auth:**

Scheduling Order Details: [Add >>](#)

1 Items View HL7 File

[RX:](#)

The RX tab of the Quick Pay window allows the review of the patient's prescriptions.

Quick Pay - 93980 - Test, Michell - Profile 1 - Microsoft Edge

https://qatest.isalushealthcare.com/officemd/app/schedule/quickpaypatient/1501/300015?timestamp=1740758167464&u1=!michell&u2=EB1011119B8348...

Patient Balance: \$914.00 93980-Test, Michell 01-Jan-1990 (35y)

Receipt Claim Order **Rx** Letter Print ⚠ Patient ✓ Elig Intake ⚠ ID Auth

Method	Status	Action	Start Date	Drug and Dosage	Refilled	E-Status	Pharmacy
Historical	Current		11/10/2022	No Known Medications			

Letter:

The Letter tab of the Quick Pay window allows letters to created, reviewed, and printed for the patient.

Quick Pay - 93980 - Test, Michell - Profile 1 - Microsoft Edge

https://qatest.isalushealthcare.com/officemd/app/schedule/quickpaypatient/1501/300015?timestamp=1740758167464&u1=lmichell&u2=EB1011119B8348...

Patient Balance: \$914.00

93980-Test, Michell 01-Jan-1990 (35y)

Receipt Claim Order Rx **Letter** Print Patient Elig Intake ID Auth

New Print Save Encounter Audit

Template: Return to Work/School w/ limit Saved By: Status: Letter Name: New Letter Letter Date: Revision:

02/28/2025

RE: Michell Test
Address: 123 East ST Port Saint Lucie, FL 34953
DOB: 01/01/1990

To Whom It May Concern:

Michell Test was seen in our office today's for an evaluation.

He may return to work/school on _____, with the following limitations:

- 1.
- 2.
- 3.

Please excuse his absence.

If there are any questions, please call.

Sincerely,

[Print:](#)

The Print tab of the Quick Pay window provides access to the patient's print queue allowing the items assigned to the patient's print queue to be printed.

Quick Pay - 93980 - Test, Michell - Profile 1 - Microsoft Edge

https://qatest.isalushealthcare.com/officemd/app/schedule/quickpaypatient/1501/300015?timestamp=1740758167464&u1=!michell&u2=EB1011119B8348...

Patient Balance: \$914.00 93980-Test, Michell 01-Jan-1990 (35y)

Receipt Claim Order Rx Letter **Print** Patient Elig Intake ID Auth

Print Fax

Start [calendar icon] [input] Stop [calendar icon] [input] View Printed

Search Print Add Clinical Summary Export Clinical Summary Delete

<input type="checkbox"/>	Type	Description	Created	Printed Date	Printed By
<input type="checkbox"/>	Document	MyMedicalLocker Welcome Letter	11/26/2024		
<input type="checkbox"/>	Document	MyMedicalLocker Welcome Letter	03/03/2025		
<input type="checkbox"/>	Document	MyMedicalLocker Welcome Letter	02/25/2025		

Patient:

The Patient tab of the Quick Pay window will allow the reviewing of the patient's demographics and also display the outcome of the patient validation.

Quick Pay - 93980 - Test, Michell - Profile 1 - Microsoft Edge

https://qatest.isalushealthcare.com/officemd/app/schedule/quickpaypatient/1501/300015?timestamp=1740758167464&u1=Imichell&u2=EB1011119B8348...

Patient Balance: \$914.00 93980-Test, Michell 01-Jan-1990 (35y)

Receipt Claim Order Rx Letter Print Patient Elig Intake ID Auth

✓ Patient Validation Checks:
Michell Test has passed the validation checks.

Chart 93980

123 East ST	Home (123) 444-5555	PCP	Employer
Port Saint Lucie, FL 34953 USA info@isalushealthcare.com	Work (123) 444-5551	Marital Married	Ethnicity
	Other (123) 444-5551	Language	Race Declined to specify

Test

Home
Work
Other

Aetna Test - (555) 337-2278

Commercial	Start Date	Sig On File 11/10/2022
\$0.00	Member ID # 00123154584	Group Policy # 0357159789640123

Michell Test

123 East ST	Home (123) 444-5555
Port Saint Lucie, FL 34953 USA	Work (123) 444-5551
	Other (123) 444-5551

Next 3 Visits

03/03/2025 12:00PM(15m)	Goldsmith, Clarence	Choice - Main Office	Checked-Out	Blood Draw
03/05/2025 11:00AM(15m)	Goldsmith, Clarence	Choice - Main Office	Scheduled	Blood Draw
03/06/2025 9:00AM(1h)	Michell Test	Choice - Main Office	Scheduled	New Complaint

Previous 3 Visits

02/26/2025 12:45PM(15m)	Goldsmith, Clarence	Choice - North	Scheduled	Blood Draw
02/25/2025 4:00PM(15m)	Goldsmith, Clarence	Choice - Main Office	Checked-In	Blood Draw
02/20/2025 9:45AM(30m)	Goldsmith, Clarence	Choice - North	Scheduled	Appointment Reminder

Elig:

The Elig tab of the Quick Pay window allows to view the latest eligibility check for the patient along with allowing a new eligibility check to be completed.

Quick Pay - 93980 - Test, Michell - Profile 1 - Microsoft Edge

https://qatest.isalushealthcare.com/officemd/app/schedule/quickpaypatient/1501/300015?timestamp=1740766007250&u1=lmichell&u2=EB101111988348FC8C...

Patient Balance: \$914.00 93980-Test, Michell 01-Jan-1990 (35y)

Receipt Claim Order Rx Letter Print Patient Elig Intake ID Auth

Test, Michell Born 01-Jan-1990 (35y) Gender Male

#	Carrier	Member ID	Policy/Group	Start	End	Last Run	Subscriber	Relation.	Active
1	Aetna Test	00123154584	03571597896...			02/10/2023	Test, Michell	Self	Yes

Only Display Active Insurances

Intake:

The Intake tab on the Quick Pay window will allow you to view intake assignments and allow the assignment of an intake.

Quick Pay - 93980 - Test, Michell - Profile 1 - Microsoft Edge

https://qatest.isalushealthcare.com/officemd/app/schedule/quickpaypatient/1501/300015?timestamp=1740766007250&u1=Imichell&u2=EB101111988348FC8C...

Patient Balance: \$914.00

93980-Test, Michell 01-Jan-1990 (35y)

Receipt Claim Order Rx Letter Print Patient Elig Intake ID Auth

Next 5 Appointments

Date	Type	Scheduled With	Location	Inake Name	Status
03/03/2025 12:00PM	Blood Draw	Clarence Goldsmith	Choice - Main Office	zz	New
03/05/2025 11:00AM	Blood Draw	Clarence Goldsmith	Choice - Main Office	zz	New
03/06/2025 9:00AM	New Complaint	Michell Test	Choice - Main Office		

Active Historical

Intakes Assigned

ID	O	L	Intake Name	Type	Due Date	Status	Intake	Required	Updated	D
76966			zz	Appointment	03/03/2025	New	0%	0%		
76967			zz	Appointment	03/05/2025	New	0%	0%		

New Edit Delete Send Intake Link Fill out in Office Merge Response

ID:

The ID tab of the Quick Pay window allows the viewing and addition of a patient photograph, patient ID, primary insurance card, secondary insurance card, and pharmacy benefit card.


Quick Pay - 93980 - Test, Michell - Profile 1 - Microsoft Edge

https://qatest.isalushealthcare.com/officemd/app/schedule/quickpaypatient/1501/300015?timestamp=1740766007250&u1=Imichell&u2=EB101111988348FC8C...

Patient Balance: \$914.00 93980-Test, Michell 01-Jan-1990 (35y)

Receipt Claim Order Rx Letter Print Patient Elig Intake ID Auth

Patient Photograph



Take Photo Scan Display Photos

Patient Photograph.EMR.Head Shot

Patient ID Card

*** NOTE: Card not found but may exist. Please check for Patient Ids Cards [here](#). Please verify the "Patient Id Card Naming Standard" in company settings.

Scan Display Patient Ids

cliffs cabinet.New Drawer.Patient ID Card

Primary Insurance Card

Front Back

Auth:

The Auth tab of the Quick Pay window allows the viewing and addition of the patient authorizations.

Quick Pay - 93980 - Test, Michell - Profile 1 - Microsoft Edge

https://qatest.isalushealthcare.com/officemd/app/schedule/quickpaypatient/1501/300015?timestamp=1740766007250&u1=Imichell&u2=EB101111988348FC8C...

Patient Patient Balance: \$914.00 93980-Test, Michell 01-Jan-1990 (35y)

Receipt Claim Order Rx Letter Print Patient Elig Intake ID Auth

Referred By Referred To

Authorizations Show all authorizations Row 0 of 0

	Status	Reason	#	Referred By	Payer	Coverage	Start	End
No data found								

Menu Primary Required Secondary Required Tertiary Required Assign