

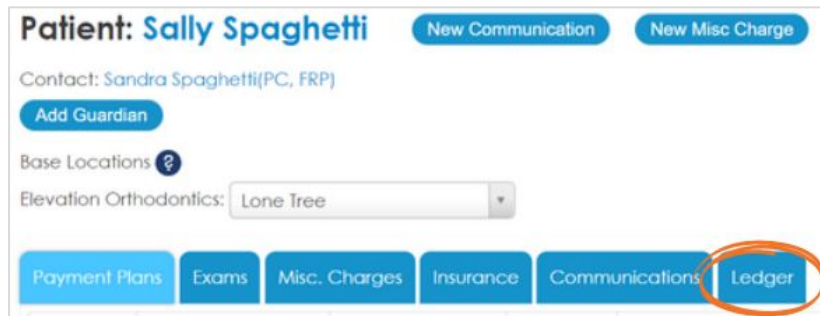
How to Post and Manage Patient Payments

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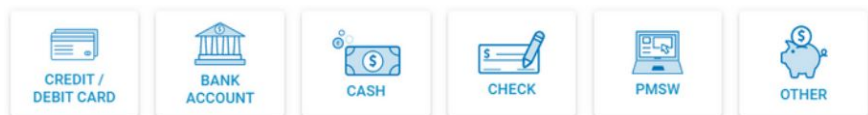
How to Post Patient Payments in the Ledger

1. Start on the Patient's Detail Page
2. Select **Ledger** tab
3. Select **MAKE A PAYMENT**



4. The next monthly invoice due will automatically populate as **Amount Due**
5. You can also choose to **Pay off contract** or **Pay another amount**
6. Once you have selected the amount to collect, select **GO TO PAYMENT METHOD**
7. Select Payment Method

The screenshot shows the payment selection screen. At the top, it displays 'Amount Due \$194.45' with a due date of 8/9/20. Below this, there are three radio button options for selecting the payment amount: 'Pay amount due: \$194.45' (which is selected), 'Pay off contract: \$3,500.00', and 'Pay another amount: \$ 0.00'. At the bottom, there are two buttons: 'CANCEL' and 'GO TO PAYMENT METHOD'.



How to Manage Patient Payments

1. Start on the Patient's Detail Page
2. Click the **Payment Plans** tab
3. Click **Action** > **View Payment Plan**
4. From there, you can:
 - a. View all invoices
 - b. Pay upcoming or late monthly invoices
 - c. View, edit, or remove payment methods and auto-pay methods

Patient: Sally Spaghetti [New Communication](#) [New Misc Charge](#)

Contact: Sandra Spaghetti(PC, FRP)

[Add Guardian](#)

Base Locations [?](#)

Elevation Orthodontics:

[Payment Plans](#) [Exams](#) [Misc. Charges](#) [Insurance](#) [Communications](#) [Ledger](#)

Start Date	Location	Treatment/Charge	Pay Off Amount	Date of Last Payment	Account Status	Contract FRP	Contract ID
9/30/2020	Elevation Orthodontics - Lone Tree	Insignia	\$2,900.00	9/30/2020	Up to Date	Sandra Spaghetti(sandra.spaghetti1234567@orthofi.com)	47002

[Action](#)

[View Payment Plan](#)

Patient: Sally Spaghetti

Payment Plan Summary

Plan Details

Plan Status: **Up to Date** [View All Invoices](#)

First Payment: October 30, 2020

Last Payment: September 30, 2022

Monthly Pay Amount: \$120.84

Pay Off Amount: \$2,900.00 [Pay upcoming or late monthly invoices](#)

Past Due Balance: \$0.00

Next Payment

Next Payment Due: October 30, 2020 [Pay upcoming or late monthly invoices](#)

Next Payment Amount: \$120.84 [Pay Invoice](#)

Auto-Pay Methods

Account Information	Payment Type	Card Type	Account
Sandra Spaghetti	Credit Card	Visa	visa 1111

[View, edit, or remove payment methods and auto-pay methods](#)

[Manage Payment Methods](#)

How to Manage Autopay Methods

A Payment Method is required to be on file at all times. **You must add a new payment method before being able to remove one.**

Payment Methods

Please Note:

- If any automatic payment methods change, and two automatic methods are indicated, the split defaults to 50 / 50 between the two payment methods.
- If an automated payment method is shared with multiple payment plans, it will not be removed from other payment plans.
- One active autopay method is required at all times. You can have up to two.
- We keep a record of when autopay methods are removed and by whom.

Account Information	Payment Method	Use for Auto-Pay	
Cindy Smith	Mom's Credit Card	✓	Remove Payment Method
Tom Smith	Dad's Credit Card	✓	Remove Payment Method

[Add Payment Method](#)

[Back to Summary](#) [Save Changes](#)

How to Split Monthly Payments

1. Add Second Payment Method
2. Use sliders to reach desired split
3. Click Update Amounts to save

Auto-Pay Methods

Adjust the sliders below to spread your automated payment across different payment methods

Cindy Smith [Remove](#)

Mom's Credit Card

50% Applied to Monthly Payment

Tom Smith [Remove](#)

Dad's Credit Card

50% Applied to Monthly Payment

Accepted Payment Methods:

- Visa
- Mastercard
- Discover
- American Express
- Checking Account [ACH]
- Savings Account [ACH]
- Health Savings Account
- Flexible Savings Account