

## Posting Patient Payments

- Start on the Patient's Detail Page
- Select **Ledger** tab
- Select **MAKE A PAYMENT**

Patient: **Sally Spaghetti**

New Communication

New Misc Charge

Contact: Sandra Spaghetti(PC, FRP)

Add Guardian

Base Locations ?

Elevation Orthodontics: Lone Tree

Payment Plans

Exams

Misc. Charges

Insurance

Communications

Ledger

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

Amount Due  
**\$194.45**

Due date 8/9/20

Select Payment Amount

- Pay amount due: **\$194.45**
- Pay off contract: \$3,500.00
- Pay another amount: \$ 0.00 ?

CANCEL

GO TO PAYMENT METHOD



CREDIT /  
DEBIT CARD



BANK  
ACCOUNT



CASH



CHECK



PMSW



OTHER

## Managing Patient Payments

- Start on the Patient's Detail Page
- Click the **Payment Plans** tab
- Click **Action > View Payment Plan**

**Patient: Sally Spaghetti**

[New Communication](#)

[New Misc Charge](#)

Contact: Sandra Spaghetti(PC, FRP)

[Add Guardian](#)

Base Locations

Elevation Orthodontics:

**Payment Plans**

Exams

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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	<a href="#">Action</a> View Payment Plan

**Patient: Sally Spaghetti**

### Payment Plan Summary

#### Plan Details

Plan Status Up to Date

**VIEW ALL INVOICES**

[View All Invoices](#)

First Payment October 30, 2020

Last Payment September 30, 2022

Monthly Pay Amount \$120.84

**PAY UPCOMING OR LATE MONTHLY INVOICE**

[Make Payment](#)

Pay Off Amount \$2,900.00

Past Due Balance \$0.00

#### Next Payment

Next Payment Due October 30, 2020

**PAY UPCOMING OR LATE MONTHLY INVOICE**

[Pay Invoice](#)

Next Payment Amount \$120.84

#### Auto-Pay Methods

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

**VIEW / EDIT / REMOVE PAYMENT METHODS & AUTO-PAY METHODS**

[Manage Payment Methods](#)

## Managing Auto-Pay 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	<input checked="" type="checkbox"/>	<a href="#">Remove Payment Method</a>
Tom Smith	Dad's Credit Card	<input checked="" type="checkbox"/>	<a href="#">Remove Payment Method</a>
			<a href="#">Add Payment Method</a>

[Back to Summary](#)

[Save Changes](#)

## Splitting Monthly Payments

- Add Second Payment Method
- Use sliders to reach desired split
- 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

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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