**Managing Patient Transactions** - You will handle all patient billing needs in this area. If a patient phones in to discuss an outstanding balance or a statement they have received, you will want to access their ledger.

Below is a recap of each of the Transactions tab.

- **General** is read-only and provides a concise summary of all the patient's billing information.
- **Treatment** is for printing out patients statements as well as other tasks.
- **Charges** is to record non-treatment charges.
- **Pmt Plan** is for setting up and managing payment plans.
- **Payment** is used to record patient payments (cash, credit card, check).
- **Adjustment** is used to make changes to the record.
- **Ins Pmt** is for insurance payments.
- **Notes** is for non-treatment notes i.e. insurance has been billed, payment or adjustment notes.