Family Payments

This document will review how to process payments across all outstanding charges on an account (current and other patients, payment plan treatments and non-treatment plan treatments, and office charges).

1. Select one of the family members and go into the Transactions module.

2. Click on the Payment tab and click the New button to enter a new payment.

3. Then click the Select Patients button to open the Select Patient(s) (payment is for) window.
4. To make a payment on multiple family members’ accounts, ensure the checkbox beside their names is selected.

**The Total for selected patients area at the bottom of the Select Patient(s) (payment is for) window will change as different and/or multiple family members are selected.**

**REMEMBER:** Even if the user has gone into the Transactions area for one patient, they can change to a different family member by ensuring that their name is highlighted and checked before clicking the OK button.
5. Notice the name at the top of the screen is now for June Cleaver. The account summary area on the right-hand side of the window reflects the total of all the SELECTED family members – not just the currently selected patient.

6. The user can now continue making the payment as they normally would.
Held For:

If user is uncertain who to select under the Held For drop-down list, select the Account holder. This selection will only affect the account if the payment is NOT allocated. If the payments are allocated immediately to the appropriate patients and treatments, then the Held For choice is somewhat redundant.

7. If there is a Payment Plan on the account and the user receives a Warning Message, click the NO button as the payment taken today, will apply funds to multiple treatments on multiple family members.

Apply to Payment Plan Warning:

Only click the “Yes” button to the Apply To Payment Plan Warning window if the entire payment is to be allocated to a payment plan. If any of the funds are to be used by treatment other than the payment plan, click “No”.

8. The payment will now sit in the lower portion of the window in green text (which indicates the payment has yet to be allocated).

<table>
<thead>
<tr>
<th>Tax #</th>
<th>Date</th>
<th>Name</th>
<th>Code</th>
<th>Description</th>
<th>Amount</th>
<th>Applied</th>
<th>Pre-pay</th>
<th>Remaining</th>
</tr>
</thead>
<tbody>
<tr>
<td>161</td>
<td>06/28/2012</td>
<td>Ward</td>
<td>CHECK</td>
<td>Check #1234</td>
<td>2076.00</td>
<td>0.00</td>
<td>0.00</td>
<td>2076.00</td>
</tr>
</tbody>
</table>

Total: 2076.00

9. Highlight the payment line and click the **Allocate** button to open the **Applying Payment** window.
10. All outstanding monies on the account will display here for the user to select from. To filter the screen, the user can check (or un-check family members) along the left-hand side of the screen.

Txs to Include checkboxes:

*If the user is applying payments to both regular treatments and treatments included in a payment plan, it is important to have both of these checkboxes selected to allow the user to “see the big picture”*
11. All treatments included in a payment plan will display the Plan number in the Plan column.

12. The user can start applying the payment to all treatments not included in a payment plan. Simply highlight the first line, the Apply amount will automatically populate based on the amount owing for the selected line. The user can then click the Apply button once satisfied.
13. The Applied column will now display the newly applied payment. The user can now go through the remainder of the outstanding treatments and follow the same steps – until they get to the treatment(s) on a Payment Plan.

14. The Payment Plan line displays the total amount owing on the payment plan instead of just the monthly amount that is currently due – that is why this is ideal to leave until the end. In our example, the remaining amount equals the monthly payment. Simply highlight the desired line and follow the same payment allocation steps as with regular treatments.
When to use the Auto Apply button:

If the patient is paying the account in full or if the payment should be applied to the oldest outstanding balance on the account, the **Auto Apply** button will perform that function. Use the patient and treatment type checkboxes (non plan or pay plan) to display all treatments to be paid and then click the **Auto Apply** button.

15. The entire payment has now been allocated across the family’s account. Click the **OK** button to close the **Applying Payment** window.
16. The user is now back in the **Payment** tab of Transactions and the payment now appears in black text indicating it has been allocated. The **Guarantors’ Payment** sub-tab shows the full payment amount for the account.

![Image of Payment tab]

17. The user can click on the currently selected patient’s **Patient Payments** sub-tab in the **Payment** tab of Transactions to see how the payment was allocate to this specific family member’s account.

![Image of Patient Payments sub-tab]

18. Moving to another family member, the user can see how the payment allocation differs based on the amount that was sitting on the patient’s account. Use the **Select Patients** button to change the active patient.

![Image of Select Patients button]