

# Collect a Payment at the Time of Check Out

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Version 21.3

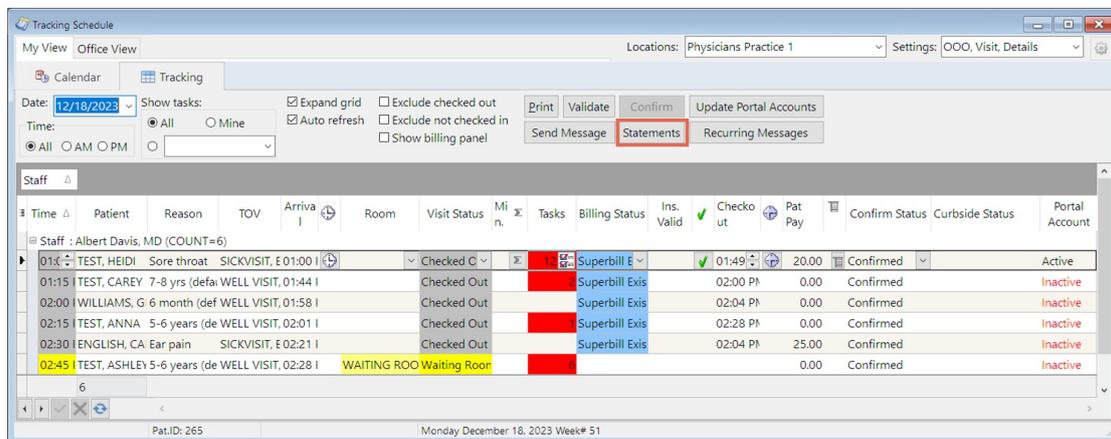
**Path: Clinical, Practice Management, or Billing tab > Schedule button > Tracking radio button**

## Overview

In this article, you will learn how to collect a payment at check out and how to print a patient statement all from within the Tracking window of the Schedule.

## How to Print a Statement from the Tracking Tab

Left-click to select the patient's appointment and then click on the **Statements** button.

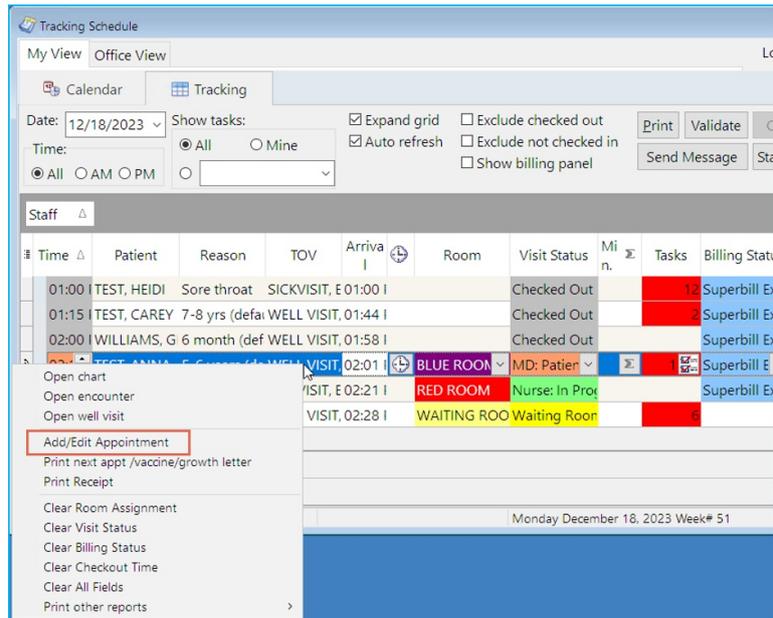


The screenshot shows the 'Tracking Schedule' window. At the top, there are tabs for 'My View' and 'Office View', and a 'Locations' dropdown set to 'Physicians Practice 1'. Below that, there are 'Calendar' and 'Tracking' tabs. The 'Tracking' tab is active, showing a date of '12/18/2023' and a 'Time' dropdown set to 'All'. There are several checkboxes for 'Expand grid', 'Auto refresh', 'Exclude checked out', 'Exclude not checked in', and 'Show billing panel'. A 'Print' button is highlighted in red. Below the checkboxes, there are buttons for 'Send Message', 'Statements' (highlighted in red), and 'Recurring Messages'. The main area is a table with columns: Time, Patient, Reason, TOV, Arriva, Room, Visit Status, Mi n., Tasks, Billing Status, Ins. Valid, Checko ut, Pat Pay, Confirm Status, Curbside Status, and Portal Account. The table shows several appointments, with the first one highlighted in yellow. The 'Statements' button is highlighted in red.

Time	Patient	Reason	TOV	Arriva	Room	Visit Status	Mi n.	Tasks	Billing Status	Ins. Valid	Checko ut	Pat Pay	Confirm Status	Curbside Status	Portal Account
01:00	TEST, HEIDI	Sore throat	SICKVISIT, E 01:00 I			Checked C		Superbill E			01:49	20.00	Confirmed		Active
01:15	TEST, CAREY	7-8 yrs (defa	WELL VISIT, 01:44 I			Checked Out		Superbill Exis			02:00 P	0.00	Confirmed		Inactive
02:00	WILLIAMS, G	6 month (def	WELL VISIT, 01:58 I			Checked Out		Superbill Exis			02:04 P	0.00	Confirmed		Inactive
02:15	TEST, ANNA	5-6 years (de	WELL VISIT, 02:01 I			Checked Out		Superbill Exis			02:28 P	0.00	Confirmed		Inactive
02:30	ENGLISH, CA	Ear pain	SICKVISIT, E 02:21 I			Checked Out		Superbill Exis			02:04 P	25.00	Confirmed		Inactive
02:45	TEST, ASHLEY	5-6 years (de	WELL VISIT, 02:28 I		WAITING ROO	Waiting Room						0.00	Confirmed		Inactive

## How to Check a Patient Out from the Tracking Tab

1. Left-click to select the patient's appointment.
2. Right-click on the appointment.
3. Select **Add/Edit Appointment** from the drop-down menu.



4. In the Payment Received field of the Add/Edit Appointment window, click on the **Credit Card** button . The Patient Credit Account is displayed.
5. Enter the **Pay Method**.
6. Enter the **Credit Amount**.
7. Click **Save/Post**.

