

Bill Pay: Payment Workflow

Last Modified on 03/24/2022 4:13 pm EDT

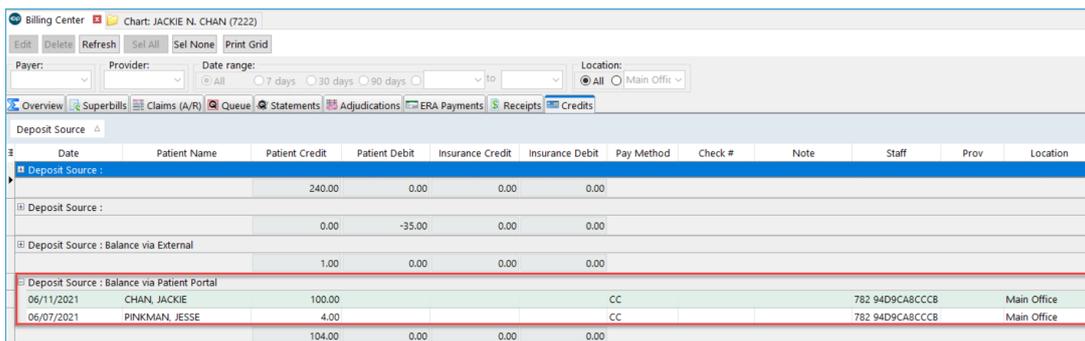
Path: Billing Tab > Billing Center button

About

When the Bill Pay feature is enabled, patient balances are sent to the OP Patient Portal and Instamed on a daily basis. Using the Bill Pay feature, payments made on the OP Patient Portal will automatically be brought into OP. For Practices that currently use both the OP Patient Portal (InteliChart) and Instamed Merchant Services, Bill Pay allows parents/patients to make payments to their outstanding patient balances directly from within the Patient Portal.

View Payments Made on the OP Patient Portal

Payments made on the OP Patient Portal are displayed in the Credits tab of the Billing Center in OP (**Billing tab > Billing Center button > Credits tab**) and in the Credits section of the patient's chart (**Clinical, Practice Management, or Billing tab > Patient Chart button > Credits**). In both places, the portal payments are identified with a Deposit Source of Balance via Patient Portal.



#	Date	Patient Name	Patient Credit	Patient Debit	Insurance Credit	Insurance Debit	Pay Method	Check #	Note	Staff	Prov	Location
Deposit Source :												
			240.00	0.00	0.00	0.00						
Deposit Source :												
			0.00	-35.00	0.00	0.00						
Deposit Source : Balance via External												
			1.00	0.00	0.00	0.00						
Deposit Source : Balance via Patient Portal												
	06/11/2021	CHAN, JACKIE	100.00				CC			782 94D9CA8CCCB		Main Office
	06/07/2021	PINKMAN, JESSE	4.00				CC			782 94D9CA8CCCB		Main Office
			104.00	0.00	0.00	0.00						

Apply Patient Portal Credits to Patient Balances

All credits made towards balances on the OP Patient Portal will need to be manually applied to the patient/family. Refer to the Credits tab of the Billing Center as a guide to apply payments made on the portal.

1. Navigate to the **Patient Chart** for the patient who has a credit you will apply.
2. Click **Payments**.
3. Click the **New Payment** button. The Add Payments and Adjustments window is displayed.
4. Click the **Patient** tab.
5. From the Pay Method drop-down, select **PC Patient Credit**.
6. In the Payment field, enter the amount of the credit you are applying.
7. Click the **Save + Close** button.