

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.

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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.





Tracking Schedule								
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- 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.

Patient's Credit /	Account	×					
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