

# Entering a Copay or Other Patient Credit

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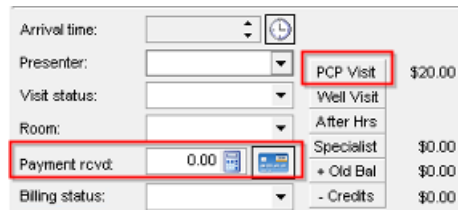
Version 14.19

## About


Patient copays and unallocated balance payments can be entered on the Add/Edit Appointment window when the patient has an appointment on the current day. They can also be entered directly into the Credits section of the Patient Chart. Below, you'll find instructions on each method of credit entry.

## Enter a Copay from the Calendar Schedule

1. Navigate to the Calendar: **Clinical, Practice Management, or Billing tab > Schedule button > Calendar radio button.**
2. Locate and double-click the **appointment** to open the Add/Edit Appointment window.
3. Click the **PCP Visit** button to populate the copay amount (from the patient's Insurance record) in the **Payment rcvd** field.

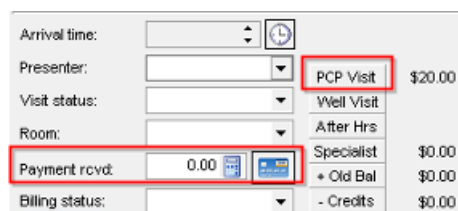


Arrival time:	<input type="text"/>	<input type="button" value="Clock"/>	
Presenter:	<input type="text"/>	<input type="button" value="PCP Visit"/>	\$20.00
Visit status:	<input type="text"/>	<input type="button" value="Well Visit"/>	
Room:	<input type="text"/>	<input type="button" value="After Hrs"/>	
Payment rcvd:	0.00	<input type="button" value="+ Old Bal"/>	<input type="button" value="Specialist"/>
Billing status:	<input type="text"/>	<input type="button" value="+ Old Bal"/>	\$0.00
		<input type="button" value="- Credits"/>	\$0.00


4. (Optional) Click the **+ Old Bal** button to add the old balance amount displayed to the **Payment rcvd** field.
5. (Optional) Click the **- Credits** button to subtract existing patient credits from the amount calculated in the **Payment rcvd** field.
6. Click the **Payment** button  to open the Patient's Credit Account window.
7. Proceed to the **Enter Patient Credit Details** section below.

## Enter a Copay from the Tracking Schedule

1. Navigate to the Tracking Schedule: **Clinical, Practice Management, or Billing tab > Schedule button > Tracking radio button.**
2. Locate and right-click on the **appointment**.
3. Select **Add/Edit Appointment** to open the Add/Edit Appointment window.
4. Click the **PCP Visit** button to pre-populate the payment received field with the copay as listed on the patient insurance record.
5. Click the **PCP Visit** button to populate the copay amount (from the patient's Insurance record) in the **Payment rcvd** field.



Arrival time:	<input type="text"/>	<input type="button" value="Clock"/>	
Presenter:	<input type="text"/>	<input type="button" value="PCP Visit"/>	\$20.00
Visit status:	<input type="text"/>	<input type="button" value="Well Visit"/>	
Room:	<input type="text"/>	<input type="button" value="After Hrs"/>	
Payment rcvd:	0.00	<input type="button" value="+ Old Bal"/>	<input type="button" value="Specialist"/>
Billing status:	<input type="text"/>	<input type="button" value="+ Old Bal"/>	\$0.00
		<input type="button" value="- Credits"/>	\$0.00

6. Click the **Payment** button  to open the Patient's Credit Account window.
7. Proceed to the **Enter Patient Credit Details** section below.

## Enter a Copay from the Patient Chart

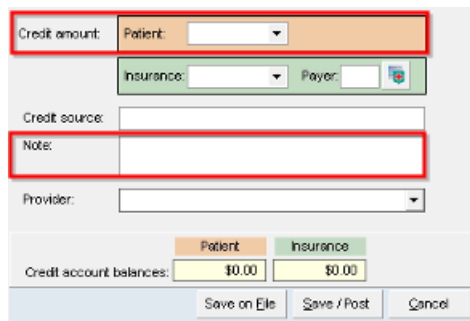
1. Navigate to the Credits section of the patient's chart: **Clinical, Practice Management, or Billing tab > Patient Chart button > search for and select the patient > Credits.**

2. Click the **New Credit** button.
3. Proceed to the **Enter Patient Credit Details** section below.

## Enter Patient Credit Details

Complete the following steps in the Patient's Credit Account window to enter a new patient credit.

1. Select the **Pay method** from the drop-down menu.
  - If manually entering a credit for an Instamed Payment that generated a Billing Task for a Credit Card Payment Error, select **Credit Card (on file)**.
  - If integrated with Instamed Merchant Services, click [here](#) to learn how to enter credits using the swipe device.
2. (If applicable) Enter the **Check Number** in the Check/Ref # field.
3. Enter the amount of the credit in the **Patient Credit Amount** field.
4. (Optional) Enter the credit details/explanation in the **Note** field. For example, "payment made over phone".
5. Select the **Provider** from the drop-down menu.
6. Click the **Save/Post** button at the bottom of the window to save and exit the window.






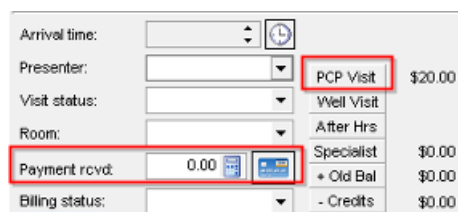
Version 14.10

## Overview

Follow the steps below on how to enter patient payments. Patient payments are posted to the patient account as a patient credit.

## Entering a Copay from the Add/Edit Appointment Window

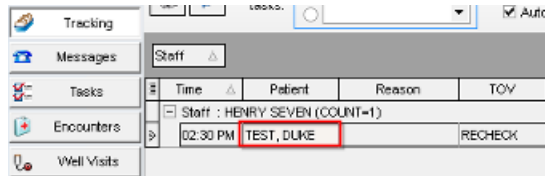
1. Click the **Schedule** button  in the Clinical tab to open the Schedule and Practice Workflow window.
2. Double-click the **Appointment** to open the Add/Edit Appointment window.
3. Click the **PCP Visit** button  to pre-populate the Payment Received field with the copay as listed on the patient insurance record.
4. Click the **Credit Card** button  to the right of the payment received field. The **Patient's Credit Account** window is displayed.




5. Proceed to Enter Credit instructions below.


## Entering a Copay from the Tracking Tab

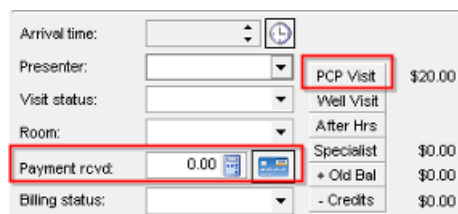
1. Right-click on the **Patient** name.



2. Select **Add/Edit Appointment**.


3. Click the **PCP Visit** button  to populate the payment received field with the copay as listed on the patient insurance record.


4. Click the **Credit Card** button  to the right of the Payment Received field. This opens the Patient's Credit Account.



5. Proceed to Enter Credit instructions below.

## Enter a Copay from the Patient Account

1. Click on the **Account** button  to open the **Patient Account**.

2. Click the **Credits** tab  **Credits** on the leftside of the form.

3. Click on the **+Credit** button .

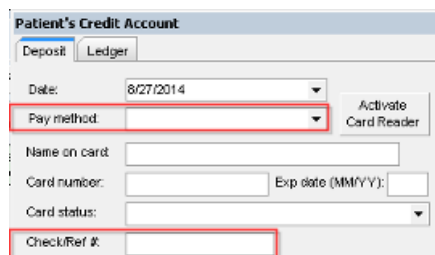
4. Proceed to **Enter Credit** instructions below.

Once on the Patient Credit Account screen:

1. Click the **Credit** button .

2. Select the method of payment from the **Pay Method** drop-down menu.

3. Enter the **Check Number** in the Check/Ref # field, if appropriate.



4. Enter the **Amount** of the payment in the Patient Credit Amount field.

5. Enter the credit details/explanation in the **Note** field, if appropriate (e.g., payment received from mom).

6. Once finished, click the **Save/Post** button at the bottom of the window to save changes and exit.

Credit amount: Patient:

insurance:  Payer:

Credit source:

Note:

Provider:

	Patient	Insurance
Credit account balances:	\$0.00	\$0.00