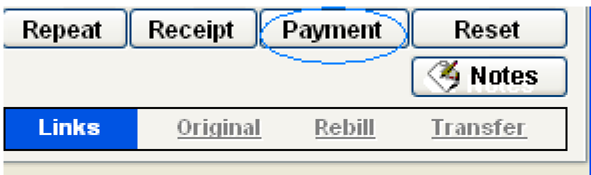
ENTERING PAYMENTS

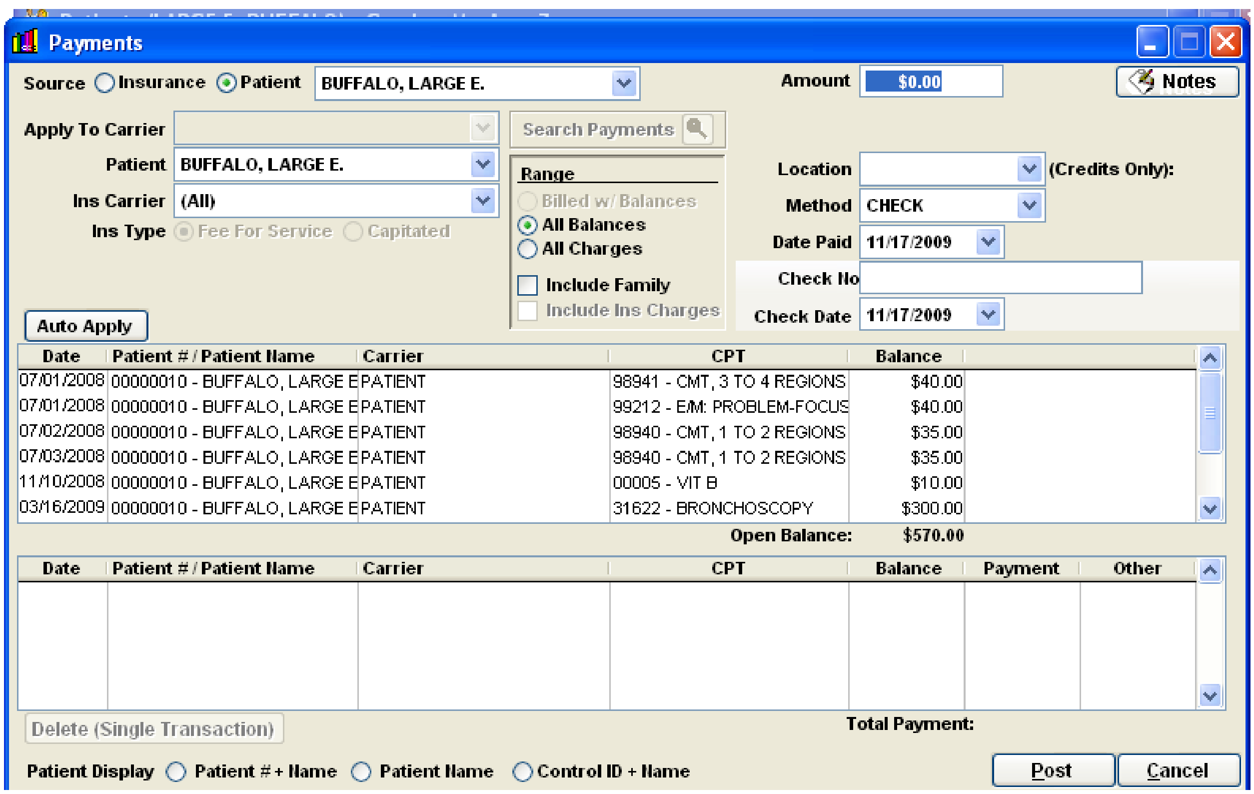
Payments originate from two main sources; either Patient or Insurance Companies.

PATIENT PAYMENTS

On every patient's Transactions screen, there is a Payment button. Clicking on this button will open access to adding a payment, and default to show only this patient's balances.



Once you click the Payment key, you will see the ClinicPro Payment screen:



Looking at this payment screen, you will notice that the **Source** button is defaulted to the Patient mode and the patient name is displayed in the field next to the source button.

On the very right of the Payment screen are the fields that hold the payment information; Amount, Method of payment, Date Paid, Check No, and Check Date.

There is also the patient information, the **Range,** which allows you to determine what transactions are readily available to apply the payment to:

- **Billed w/ balances** -Only applies to Insurance Payments, and this is defaulted for all Insurance Payments. This will show only transactions that are currently marked as billed, and still carry a balance.
- **All Balances** - This will show any transaction that has a balance for the selected payment source (Patient / Insurance).
- **All Charges -** This will show all transactions, and what is owed on them, including $0.00 balances.
- **Include Family -** This checkbox will include all the charges by any linked Responsible Party in the Patient Detail Screen. An example would be, a Father's payment screen would show his Wife and kids' charges and be able to apply payment to them.

For purposes of quick data entry, Clinic Pro utilizes the auto apply feature to disburse patient payments so that each line of the disbursement does not have to be done individually. This feature is only for Patient Payments, never Insurance payments.

> When a payment is auto applied, Clinic Pro automatically "pays off" the oldest date of service each time the user clicks the button for the patient or any person related by responsible party to the patient. There are two big advantages of using auto apply for patient payments. “Auto Apply” keeps the accounts receivables records updated and ensures that the oldest dates of service are paid off first. Auto apply is also quick and easy for the user. It saves a lot of time in data entry.

You would **NOT** want to use the “Auto Apply” feature if you have intended write-offs, discounts, or adjustments for your patient.

Below this information are two windows. The first window displays the **Range** of transactions you have asked the software to display. On this example, we have defaulted to show **All Balances:**

Date	Patient # / Patient Name	Carrier	CPT	Balance
07/01/2008	00000010 - BUFFALO, LARGE E	PATIENT	98941 - CMT, 3 TO 4 REGIONS	$40.00
07/01/2008	00000010 - BUFFALO, LARGE E	PATIENT	99212 - E/M: PROBLEM-FOCUS	$40.00
07/02/2008	00000010 - BUFFALO, LARGE E	PATIENT	98940 - CMT, 1 TO 2 REGIONS	$35.00
07/03/2008	00000010 - BUFFALO, LARGE E	PATIENT	98940 - CMT, 1 TO 2 REGIONS	$35.00
11/10/2008	00000010 - BUFFALO, LARGE E	PATIENT	00005 - VIT B	$10.00
03/16/2009	00000010 - BUFFALO, LARGE E	PATIENT	31622 - BRONCHOSCOPY	$300.00
			Open Balance:	$570.00

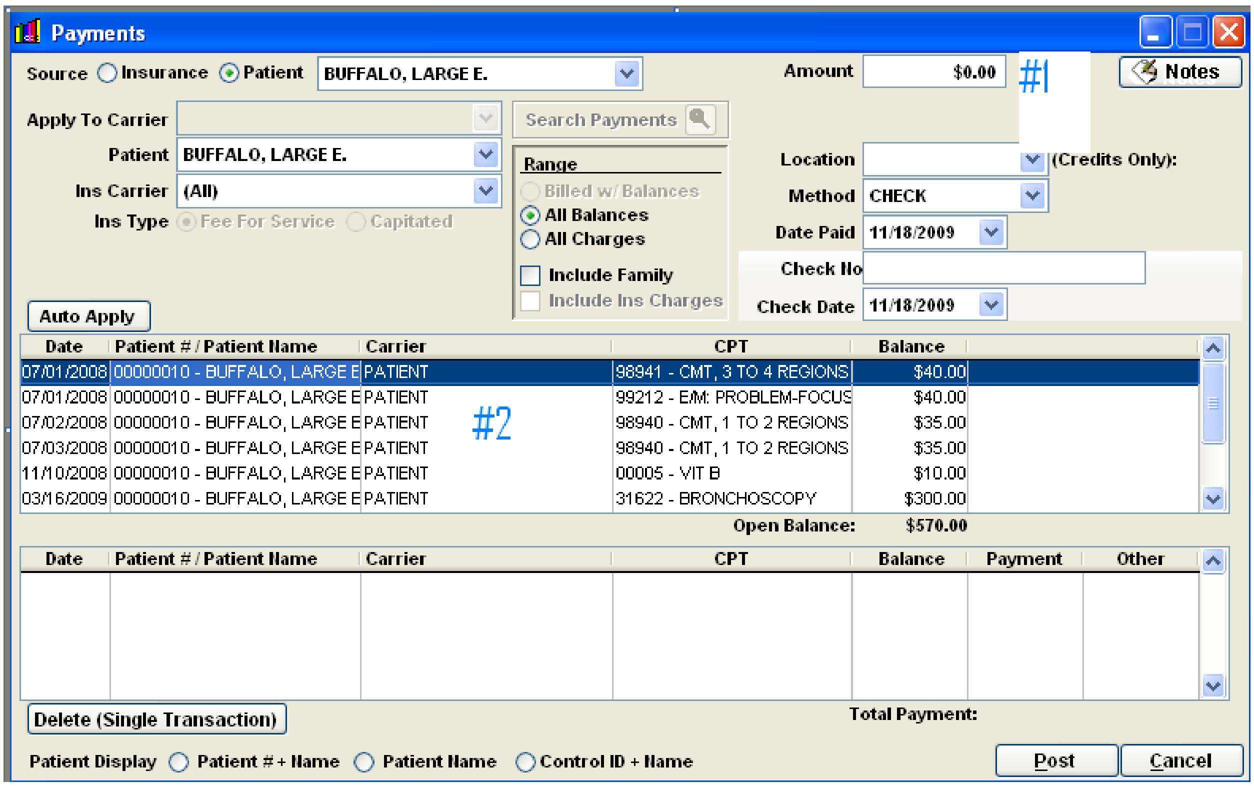
The next window will display the payments you post.

Entering Payments:

> You can use the Auto Apply feature to post them quickly, if there are no adjustments, transfers, or particular order of transactions which you wish to apply. If there are, follow the next steps for entering payments:

To enter a Payment into Clinic Pro, follow these steps: (see below image)

#1. Input the payment details. This is the method paid, and associated information like Check #, or Credit card information. The date input for "Date Paid" will be the date the Payment will appear on the Transactions Screen.

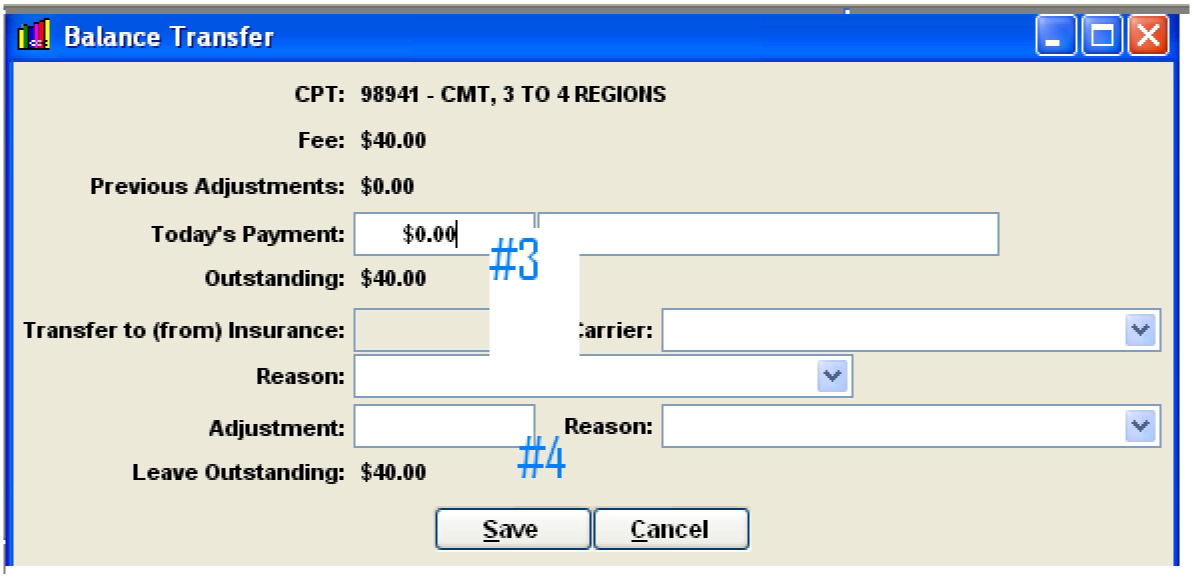


#2. Apply the payment by double-clicking on the charges that are to be paid off. This brings up the balance transfer window, for applying payments, adjustments, and transfers.

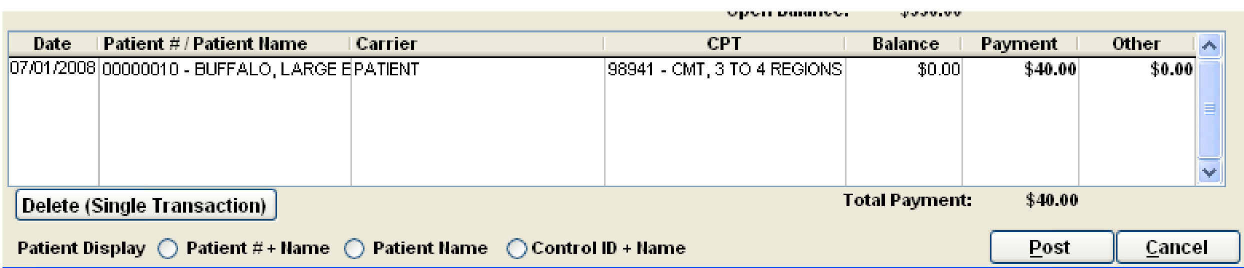
#3. This brings up the Balance Transfer Window in ClinicPro. Here is where you enter your payment information. Input the amount of money you have actually collected from your patient in the **Today's Payment** field. (see figure below)
You now have the option to Transfer to Insurance, if the patient has insurance.
There is the **REASON** field if you would like to track the transfer.

There are the **ADJUSTMENT** & **REASON** fields if you wish to apply a write-off or discount to the payment. (see write-offs below)

#4. Click “SAVE”



The payment or payments you make will now display in the bottom window of the ClinicPro payment screen.



After double-checking all the payments you have made, hit **POST.**

WRITE-OFFS / ADJUSTMENTS

On the balance transfer screen, leave the payment amount to zero and fill in the patient write-off amount and reason. Click “Save”