

Foundations: Family Payment Wizard

Paying Multiple Patient Invoices

At times, a patient will have multiple invoices that they want to pay with one payment. You can easily use the Family Payment Wizard to pay these multiple invoices instead of manually splitting the payment between these invoices.

The Family Payment Wizard is designed to save you time, even when accepting a payment for one patient with several invoices, each with an outstanding balance.

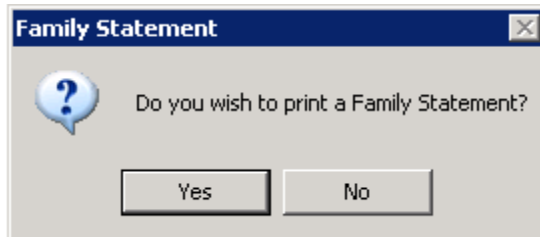
Although linking family members is critical to the use of the Family Payment Wizard, you can use the Family Payment Wizard to pay multiple invoices for one patient, whether the patient is linked to family members or not.

Paying Multiple Patient Invoices

1. Browse for Patient and make active
2. Right click on Patient record in the Workspace Manager and select Family Payment Wizard
3. Enter Check Amount
 - a. The Family Payment Wizard automatically shows the total amount owed by the patient and/or family if the family is linked. You can change this amount, if the patient is paying something other than the amount shown.
4. Enter Default Data
 - a. Description – Optional (e.g. Patient Payment Received)
 - b. Reference - Required (e.g. Check Number 12345)
 - c. Payment Code – Required (e.g. Cash, Check, etc.)
 - d. Adjustment Code – Optional (e.g. Doctor's Courtesy, Savings, etc.)
5. Click Next
6. Select Patient
7. Select Patient Invoices to be paid and click OK
 - a. You are given the option of selecting which invoice and the amount the patient wants to pay on each invoice.



8. When the Total Entered equals the Check Amount, click Next
9. Confirm invoices to be paid and click Next
10. Click Finish
11. If you want to print a Family Statement, click Yes to the following message: Do you wish to print a Family Message?



If you want to confirm that the payment was received correctly open the patient's account and confirm that the family payment was applied correctly to each invoice.

Remember that any invoice that doesn't have a patient or insurance balance will be sent to the Patient Ledger.