

Foundations: Family Payment Wizard

Transferring Credit between Family Members

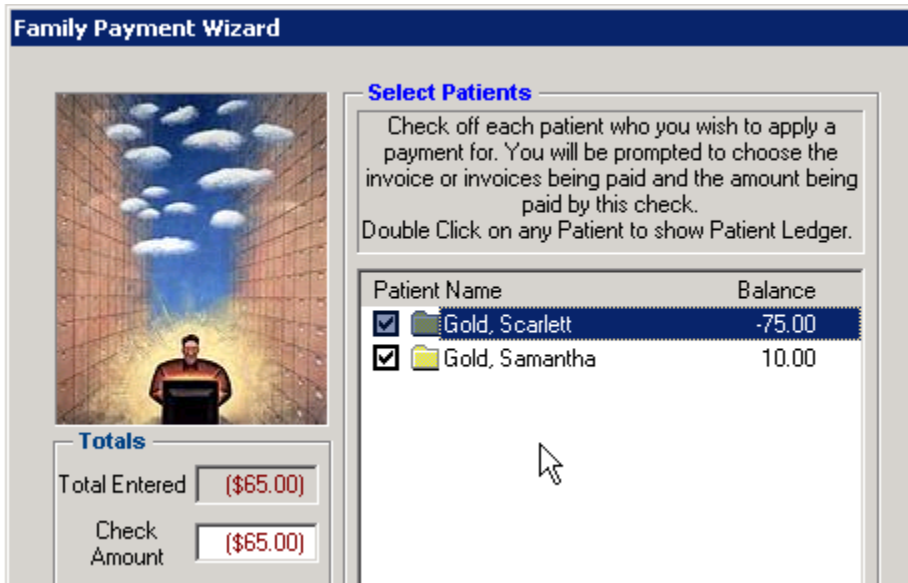
At times, a patient will have a credit that they want to apply to another family member's account. You can easily use the Family Payment Wizard to transfer and apply this credit to other family member's outstanding invoices, which will save you time.

Linking family members is critical to the use of the Family Payment Wizard. If family members are not linked, you will not be able to use the Family Payment Wizard to transfer credit between family members.

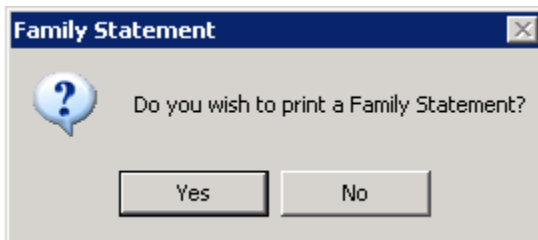
Important: You should use the Family Payment Wizard on an active Mother or Father. Remember that when linking family members you don't link siblings. For this reason, if you attempt to use the Family Payment Wizard on a child, you will be able to make payment and transfer credit on the active child and his/her Father and Mother only. Siblings will not be included during the Family Payment Wizard.

Transferring Credit between Family Members

1. Browse for Mother or Father 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 family, including any all family member credits. You can change this amount, if the patient is paying something besides the amount shown.
 - b. Note that if the credit amount covers all outstanding invoices, the family account could be \$0.00, but you should continue with the Family Payment Wizard to apply any account credit to the open invoices.
4. Enter Default Data
 - a. Description – Optional (e.g. Family 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 each Family Member
7. Select the Invoices to be paid, including any invoices with a credit balance and click OK
 - a. You are given the option of selecting which invoice, including credits and the amount the patient wants to pay on each invoice.
8. Repeat Steps 7 - 8 until all family members have been selected.



9. When the Total Entered equals the Check Amount, click Next
10. Confirm invoices to be paid and click Next
11. Click Finish
12. 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 each patient's account and confirm that the family payment was applied to the correct invoice(s). Remember that any invoice that doesn't have a patient or insurance balance will be sent to the Patient Ledger.