Accepting Payment from a Patient

How to Accept a Payment from a Patient

1. Browse ... for and make patient active
2. Open Patient Account
   a. *The Patient Account can be accessed by double clicking on the Patient Account folder under the Patient Record or clicking on the Patient Account task on the ActionManager for scheduled patients.*
3. Select Invoice tab with outstanding patient balance
   a. *Note that the amount shown on the invoice tab is for patient balance only. This amount does not indicate the amount submitted to and waiting for payment from the insurance company.*
4. Right click on invoice
5. Select Receive Payment
6. Select payment type (e.g. Cash, Check, Visa, MasterCard, American Express, Discover, etc.)
7. Enter Amount and Click OK
8. Enter Transaction description (e.g. Check Number, Credit Card Approval, Payment, Credit Card, Cash, etc.) and Click OK
9. Save Charge – F10
10. Post All - F12
11. Print Walk Out statement
12. Close Window

Please refer to the **OD Professional - Creating a Credit Memo** job aid for additional information.