Receiving Payments using the Family Payment Wizard

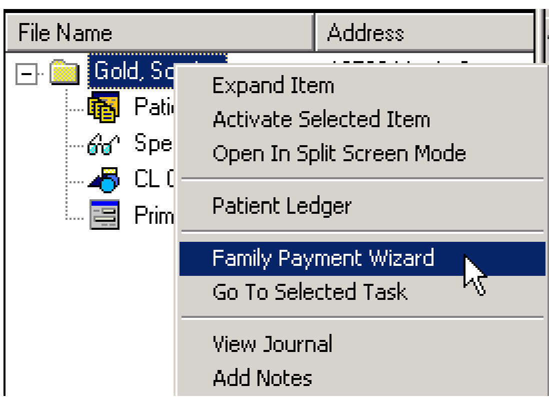
Linking family members is critical to the use of the Family Payment Wizard. If family members are not linked, you will not be able to use the Family Payment Wizard and will have to enter payments in separately for each family member.

Important: You should use the Family Payment Wizard on an active Mother or Father (assuming that each member of a family has a balance owed).

Remember that when you link 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 on the active child and his/her Father and Mother only. Siblings will not be included during the Family Payment Wizard.

The Family Payment Wizard

1. Browse for Mother or Father and make active
2. Right click on thepPatient's record in the Workspace Manager and select Family Payment Wizard



3. Enter Check Amount (The Family Payment Wizard automatically shows the total amount owed by the family. 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. 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 Patient(s)
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.

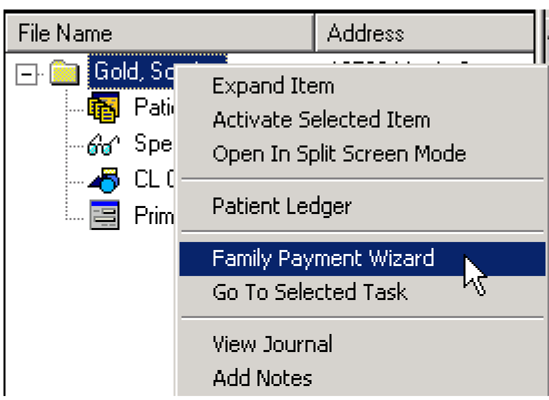
8. Repeat Steps 7 - 8 until all family members have been selected.
9. When the Total Entered equals the Check Amount, click Next
10. Confirm invoices to be paid and click Next
11. Click Finish
12. If you want to print a Family Statement, click **Yes** to the following message: Do you wish to print a 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.

Accepting Over Payments

At times a patient will want to pay more than what is owed, or inadvertently write a check for the wrong amount. You can accept a payment for an amount that is owed by the patient and create a credit on the patient invoice you select to make an overpayment.

1. Browse for Mother or Father and make active
2. Right click on the patient's 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. You can change this amount, if the patient is paying something other than the amount shown.)
    b. Enter an amount more than the amount owed.
    c. *Select **Yes** to the following message: Amount paid will exceed amount owing. Do you wish to apply a credit to a selected invoice?*
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 Patient(s)
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.
    b. At this point you need to select an invoice to make an over payment. *If you enter in an amount more than the actual invoice total you will receive the following message: Batch is not in balance. Total Entered amount must equal Check Amount during Step 9.*
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.

You will also notice a credit on the account of the patient you selected in Step 7 to make the over payment, which can be applied to future invoices or refunded to the patient.