·ind Payment Transactions

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ollow the steps below to search for transactions.

1. Select **Patient** > **Manage Account**.
2. Use the **Search** field to search through your patients or insured.

   Check the ***"Include inactive patients"*** box to include inactive patients in your search results.

3. Select the **Patient**.
4. ***Optional***: Use the **Find in Table** field to locate a payment transaction. Alternatively, filter the patient's transactions by clicking the **Options** button and entering your search criteria or loading a filter.
   1. The **Show** checkboxes determine what types of transactions should be shown. (Payments & Credits, Debits, or Activity)
   2. The **Transaction Date Range** can be used to filter which transactions are shown based on the date.
   3. The **Charge Filter** options are used to filter which transactions are shown based on the claims they are associated with.
   4. Use the 2 Checkboxes to **show dependent** or **deleted transactions**.
   5. Click **Apply**.
5. Transactions will appear in the box under **Transaction Listing.**

   Sort your search results. Visit our **Reorder Table Columns Help Article** for detailed steps on how to hide, rearrange or add header columns.

   1. Transactions will be grouped together by **DOS > Procedure Code > Payment** and can be expanded by clicking the arrow.
6. Account credits will appear under **Account Credit Listing -** credits will be grouped by **Credits Due Insurance & Credits Due Patient**.

Want to maximize the use of your screen space? Collapse or un-collapse the **Transaction Listing** or **Account Credit Listing** windows by clicking the icon.

You can open the patient for viewing or editing purposes by clicking the patient Shortcut button.