ᐟost Patient Payment

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1. Select **Payment** > **Post**.
2. Fill in the option for **Patient Payment**.
3. Click the 🔍 icon next to the **Patient** search field.
4. Select the Patient.
5. Enter the **Payment Amount**.
6. ***Optional***: Check the **Print receipt** box and select your print option to print or send a patient receipt.
7. Enter the **Received/Check Date**.
8. ***Optional***: Enter the **Deposit Date**.

   ⚠ The Deposit Date field represents the date the check was deposited into the practice's/provider's account. This field will default to be the same as the check date but may be edited to reflect any delays to ACH processing.

9. ***Optional***: Add the **Check #**.
10. Select the payment **Type.**

    Create an Unapplied Copay Credit by selecting Copay, and populating the Date Of Service (DOS). Reference our Unapplied Copay Credits Help Articles for more information.

11. Select the **Source** of the payment.

    If the In-app Credit Card Processing feature is enabled, after saving the payment, you will needed to enter the card information into the Enter Payment Window pop-up. For a detailed step by step guide, please reference the Processing a Credit Card Payment & Printing Receipts Help Articles.

11. Type a **Memo**.
12. Choose one of the following actions from to complete further steps:Credit Account (Apply Later), Apply Automatically, Apply Manually - To Charges, Apply Manually - To Payment Plans.