:nter patient payments in the Scheduler

:t Modified on 08/01/2025 3:54 pm EDT

'ost patient payments or print receipts directly from the scheduler section. In Application Credit Card 'rocessing also available from the scheduler.

⚠ All payments posted in the appointment section post as account credits. Please reference our Post Patient Payment Help Article for steps on how to post patient payments.

Who can use this feature?

Users with the Patient Payment permission set to **Post Only** can post patient payments (as a credit) within the Scheduler section , but not apply the payment towards the patient's charges.

Users with the Patient Payment permission set to **Apply** can post and apply patient payments, discounts, adjustments, and credits within the Scheduler section.

1. Select **Appointments** > **Scheduler**.
2. Click on the **Search for appointments by patient or comment** field and type in the patient's name. Or click on the **Advanced Search** field and use the filters to narrow down your search.
3. Locate and **right-click on the appointment** > Select **Edit Appointment.**

   🪄 You can also click on the appointment and select **Edit** .
4. Click on the **Payment** tab.
5. Enter the **Payment** information.
6. ***Optional***: Check the **Print receipt** box and select your print option to print or send a patient receipt.
7. ***Optional:*** Click the **Specify separate copay and payment amount** checkbox to post an amount as a "*payment*" and an amount as a "*copay*" at the same time.
8. Enter the **Received/Check Date.**
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

12. Type a **Memo**.
13. Click **Save**.
14. Verify the credit information, then click **Save.**