

Payment Plan Data

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Payment Plan Data

Payment Plan Data holds all payment plan information under a patient's account. All of the fields under this category correspond directly with fields found under the Payment section, Manage Account and Payment Plan sub-tab.

Name	Description
Patient ID	The unique identifier of a patient that a particular payment plan is associated to. The results displayed in this field are linked to the Patient section of the application.
Plan ID	The unique identifier for a particular payment plan.
Auto Pay Disable User	Displays the user that disabled the autopay (displays "CollaborateMD" if the system disabled it).
Auto Pay Enable User	Displays the user that enabled the autopay (displays "Patient" if the patient did it from the portal).
Auto Pay Status	Displays the status of the payment plan's autopay (not set up, active, disabled, failed)
Description	Displays the full description of a particular payment plan.
Is Payment Plan Overdue?	Displays "Yes" if the payment plan is overdue (i.e., the due date is in the past and has not been paid). This field will display "No" otherwise.
Name	Displays the name of a particular payment plan.
Status	Displays the current status of a particular payment plan. Specifically, the status will display exactly as they appear in the following list: <ul style="list-style-type: none">• Active• Paid• Deleted
Auto Pay Disable Date	Displays the date and time it was disabled.
Auto Pay Enable Date	Displays the date and time it was enabled.
Available Credit Amt	Displays the total amount of available payment plan credits associated to a particular payment plan.
Balance	Displays the current balance of a particular payment plan.
Total Amount	Displays the total amount of a particular payment plan to be paid over time
Total Paid	Displays the total amount of payments posted towards a particular payer plan.

Overdue Balance Aging

The Overdue Balance Aging sub-category, found under Payment Plan Data, corresponds to the aging buckets for balances associated to payment plan installments which are now overdue (i.e, due date is in the

ast).

Name	Description
21 to 150 days	Displays balances of a particular payment plan which are 121 - 150 days overdue.
51 to 180 days	Displays balances of a particular payment plan which are 151 - 180 days overdue.
81 to 365 days	Displays balances of a particular payment plan which are 181 - 365 days overdue.
31 to 60 days	Displays balances of a particular payment plan which are 31 - 60 days overdue.
61 to 90 days	Displays balances of a particular payment plan which are 61 - 90 days overdue.
91 to 120 days	Displays balances of a particular payment plan which are 91 - 120 days overdue.
Less than 30 days	Displays balances of a particular payment plan which are 1 - 30 days overdue.
Over 1 year	Displays balances of a particular payment plan which are more than 365 days overdue.

Payment Plan Installment Data

Payment Plan Installment Data holds all installment information under a particular payment plan on a patient's account. All of the fields under this category correspond directly with fields found under the Payment section, Manage Account and Payment Plan sub-tab.

Name	Description
Installment ID	The unique identifier for a particular installment.
Payment Plan ID	The unique identifier for a particular payment plan.
Description	Displays the full description of a particular installment.
Overdue?	Displays "Yes" if the installment is overdue (i.e., the due date is in the past and has not been paid). This field will display "No" otherwise.
Status	Displays the current status of a particular installment. Specifically, the status will display exactly as they appear in the following list: <ul style="list-style-type: none">● Unpaid● Paid● Deleted
Due Date	Displays the due date of a particular installment.
Last Statement Date	Displays the last date that a statement (user print or automated) was generated for a particular installment.
Days Overdue	Displays the number of days past the due date of a particular installment. This field will show "0" if the installment due date is in the future or is in the status of Paid.
Statement Sent	Displays the number of statements (user print or automated) generated for a particular installment.
Amount Due	Displays the total amount due for a particular installment.
Amount Paid	Displays the total amount paid for a particular installment.
Balance	Displays the current balance of a particular installment.