

Post New Payment to a Claim

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Who can use this feature?

Users with the Patient Payment permission set to Post Only can post patient payments (as a credit) within the Claim 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 Claim section.

Follow the steps below to add patient payments to a claim.

1. Select **Claim > Claim**.
2. Use the **Search** field to search for your claim.

 Place a check in the **"Show exact matches only"** box to search for exact matches or **"Show unpaid claims only"** to show claims that may need follow-up.

3. Open the claim.
4. Click on the **Payment** tab from the side panel.
5. From the Claim Payment tab, fill in the radio button for **Post New Payment to Claim**
6. Enter the **Payment Amount**.
7. Populate the **Payment Received Date**.
8. If applicable, enter the Check #.
9. Select the payment **Type**.
10. Select the **Source** of the payment.

 If the **In-app Credit Card Processing** feature is enabled, after saving the payment, you will need 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**

11. Update the **Memo** field as needed.
 12. Click **Save**.
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