More Actions in View Payment

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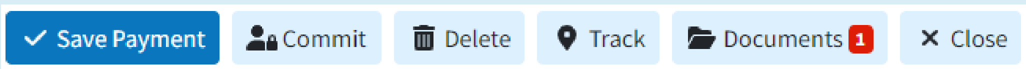
Add Documents to an Insurance Payment

Follow the steps below to associate a document to a payment.

1. Select **Payment** > **View**.
2. Fill in the option for **Insurance Payment**.
3. Enter your **Search Criteria** and click the **Search** button.
4. Select the **Insurance Payment** that meets your criteria.
5. On the **Payment from [Insurance] tab**, click Documents .
6. In the Documents window, click Add :
    1. Select **Associate Existing** and use the folder navigation to locate the existing document(s), click **Save**.
    2. Or select **Upload New** to upload a new document from your computer.
        1. Select the Folder to **Upload To**.
        2. To add more files, click + Add Files .
        3. To remove any file(s), click ✕ Remove .
        4. Once finished adding documents, click Upload Files .

        > A red number indicator is displayed in the "Documents" top button, indicating the number of documents associated with the ERA/EOB
        >
        > 
        >

7. Click **Save**.

Additional Payments Actions

1. Select **Payment** > **View**.
2. Select **Insurance Payment**.
3. Enter your **Search Criteria** and click the **Search** button.
4. Select the check that meets your criteria.
5. On the **Payments from [Insurance]** tab, click on the **Payment Line** to open the detailed payment information for the selected claim.
6. Click the **Actions** button
    1. **Print Claim After Saving**: Prints the selected claim upon saving the payment.
    2. **Create Task**: Create a task associated with this claim or payment.
    3. **Set All Charges to Paid**: Sets all charges status associated with this claim and payment to Paid.

Claim Payment Options

1. Select **Payment** > **View**.
2. Fill in the option for **Insurance Payment**.
3. Enter your **Search Criteria** and click the **Search** button.
4. Select the check that meets your criteria.
5. On the **Payments from [Insurance]** tab, click on the **Payment Line** to open the detailed payment information for the selected claim.
6. Click the **Options** button
    1. **Change Auto Calculation Mode**: Auto-calculate the adjustment based on the charge amount.
        1. Calculate adjustment based on the charge amount.
        2. Calculate adjustment based on the starting balance.
        3. Disable adjustment auto-calculation.
    2. **Show debits**: Show any posted debits associated with this claim payment

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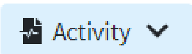
Create Tasks for Patient Payments

Follow the steps below to create a task for a patient or insurance payment.

1. Select **Payment** > **View**.
2. Select **Patient Payment**.
3. Enter your **Search Criteria** and click the **Search** button.
4. Select the **Patient Payment** that meets your criteria.
5. On the **Payment from [Patient]**, select a claim you would like to create a task for.
6. Click the **Create Task** button and reference the Create a Task Help Article for more information.

View Activity

1. Select **Payment** > **View**.
2. Select **Patient Payment** or **Insurance Payment.**
3. In the **Search** field(s), enter your search criteria and click the **Search** button.
4. Select the **Payment(s)** that meets your criteria.
5. Click 

5. An Activity record will open in a new window.

> Reference our **Activity Help Article** to learn more about the activity record.
