

Print Receipts

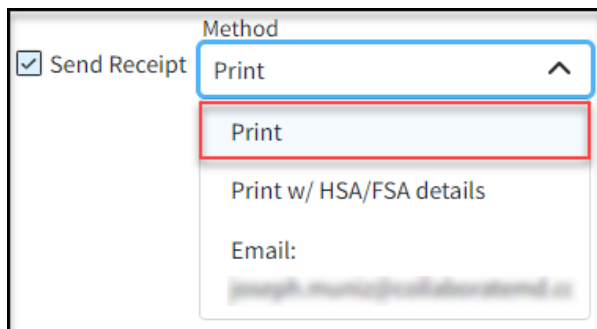
† Modified on 06/13/2024 12:03 am EDT

Print Receipt While Collecting a Payment

The **Payment > Post** section in CollaborateMD allows you to print a receipt while collecting/posting a patient payment.

⚠ You can also print receipts when posting a payment from the Scheduler or Claim sections.

1. Select **Payment > Post**.
2. Fill in the option for **Patient Payment**.
3. Enter your Patient's Payment
4. Check the **Send Receipt** box
5. Select the **Print** option from the dropdown.



The screenshot shows a form section with a checked checkbox labeled 'Send Receipt' and a dropdown menu labeled 'Method'. The dropdown menu is open, showing three options: 'Print', 'Print w/ HSA/FSA details', and 'Email:'. The 'Print' option is highlighted with a red border. Below the 'Email:' option, there is a blurred email address.

✍ You can also print a receipt with all the additional data required by the HSA/FSA guidelines by selecting the "Print w/HSA/FSA details" option.


6. Once the payment is saved the receipt will print.

Print Receipt From the Payment Tracker

Payment Tracker screen gives you the ability to pull up previously posted patient payments and print the receipts associated with those payments.

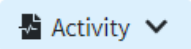
1. Select **Payment > Payment Tracker**.


2. Enter your desired **Search Criteria** or [Load a Search Filter](#).
3. Click **Search**.
4. Click the **Send** link (in the Receipt column) to open the print/send dialog box for the patient payment to be printed.
5. Select **Print**.

 You can also print a receipt with all the additional data required by the HSA/FSA guidelines by selecting the "Print w/HSA/FSA details" option.


Print Receipt From the Patient Activity Record

The **Patient Activity** screen also lets you print receipts associated with previously posted patient payment directly from the activity Payment History.

1. Select **Patient > Patient**.
2. Use the **Search** field to search through your patients.
3. Select the **Patient**.
4. Click .
5. The **Activity** record will open in a new window.

 You can also access the Activity screen from the Claim, Manage Account, Scheduler, and View Payment sections.


6. Expand the **Payment History**.
7. Right-click the row for the patient payment to be printed.
8. Click **Print Receipt**.
9. Select **Print**.

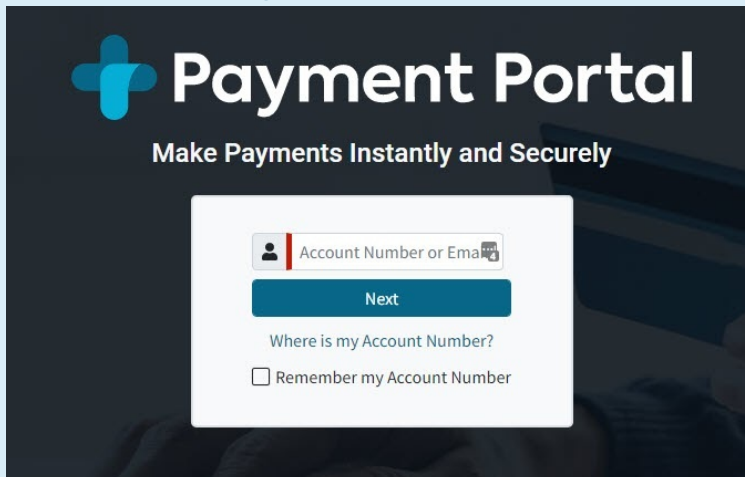
 You can also print a receipt with all the additional data required by the HSA/FSA guidelines by selecting the "Print w/HSA/FSA details" option.

Print Receipts From the Payment Portal (Patients)

The **Patient Payment Portal** allows patients to print their receipts associated with previously posted payments directly from the Payment History.

1. Patients can visit <https://www.paystatementonline.com>
2. Log in with your CollaborateMD Patient Account Number or email.

 If you have not registered, begin the registration process using the **Patient Account Number** found in the top right corner of your statement or provided in the Payment portal invite email.



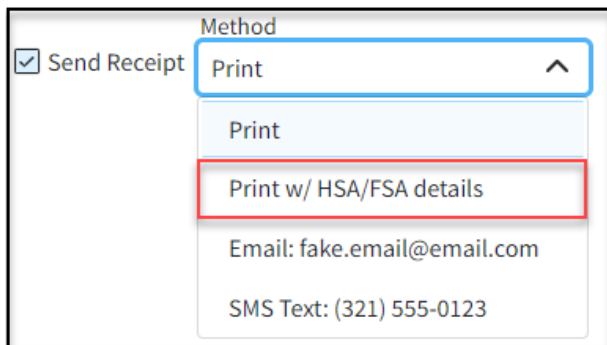
3. Click **Next**.
4. Enter your Password and click **Sign In**.
5. Click **Payment History**.
6. Select **Print Receipt** for the payment to be printed.

Print HSA/FSA Receipt


You can print a receipt that includes all the additional data required by the HSA/FSA guidelines from any screen with the print receipt capability.

Print HSA/FSA Receipt from the Post Screen

1. Select **Payment > Post**.
2. Fill in the option for **Patient Payment**.
3. Enter your Patient's Payment
4. Check the **Send Receipt** box
5. Select the **Print w/HSA/FSA details** option from the dropdown.



The screenshot shows a dialog box with a checked 'Send Receipt' checkbox. A dropdown menu titled 'Method' is open, showing 'Print' as the selected option. The dropdown list includes 'Print', 'Print w/ HSA/FSA details' (highlighted with a red box), 'Email: fake.email@email.com', and 'SMS Text: (321) 555-0123'.

 The payment must not be saved as a credit, it must be applied to print the HSA/FSA details receipt.

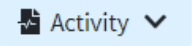
6. Once the payment is saved and applied, the receipt will print.


Print HSA/FSA Receipt from the Payment Tracker Screen

1. Select **Payment > Payment Tracker**.
2. Enter your desired **Search Criteria** or [Load a Search Filter](#).
3. Click **Search**.
4. Click the **Send** link (in the Receipt column) to open the print/send dialog box for the patient payment to be printed.
5. Select **Print w/HSA/FSA details**.

Print HSA/FSA Receipt from the Details Screen

1. Select **Patient > Patient**.
2. Use the **Search** field to search through your patients.
3. Select the **Patient**.

4. Click  Activity
5. The **Activity** record will open in a new window.

 You can also access the Activity screen from the Claim, Manage Account, Scheduler, and View Payment sections.

6. Expand the **Payment History**.
7. Right-click the row for the patient payment that needs to be printed.
8. Click **Print Receipt w/HSA/FSA details**.
9. Click **Print**.

Print HSA/FSA Receipt from the Payment Portal

1. Visit <https://www.paystatementonline.com>
 2. Log in with your CollaborateMD Patient Account Number or email.
 3. Click **Next**.
 4. Enter your Password and click **Sign In**.
 5. Click **Payment History**.
 6. Select **Print Receipt w/HSA/FSA details** for the payment to be printed.
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