

Creating an Insurance Payment Plan

1. Click on **Payment Plan** in the Patient's Account (*not the Guarantor*) & select **"Insurance Payment Plan"**

The screenshot shows the top menu bar with options: File, Setup, Lists, Reports, Tools, eServices, Alerts (0), Help. Below this is a toolbar with icons for Select Patient, Commlog, E-mail, WebMail, Text, Letter, Forms, and Tasks. A dropdown menu is open, showing options: Payment, Adjustment, New Claim, **Payment Plan**, Installment Plan, and Quick Procs. The 'Payment Plan' option is highlighted in yellow. Below this, a sub-menu is visible with options: Payment Plan, **Insurance Payment Plan** (highlighted in yellow), and Pat Es 0.0. A red arrow points from the 'Insurance Payment Plan' option to the 'Patient Account' section below.

Date	Patient	Prov	Code	Th	Description	Charge
04/16/2025	TEST	DOC	Pay		Credit Card \$0.03 TRANSACTIONTYPE: CreditSale RESULTMSG: Success DUPLICATECARD: False DATE_TIME: 04/16/2025 5:07:33 PM HOSTRESPONSECODE: 000 HOSTRESPONSEDESCRIPTION: Approval RESULT: 0 APPROVEDAMOUNT: 0.03 BATCHNO: 000000 BATCHAMOUNT: 0.03	

2. Change the provider to **Dr. Nate** & select the **Insurance Company** by clicking on "Change" then double-click the plan to attach

The screenshot shows the 'Insurance Payment Plan' form. The 'Provider' field is set to 'Dr. Nate-Coughlin, Nathan'. The 'Insurance Plan' field is highlighted in yellow, and a red arrow points to the 'Change' button next to it. Below the 'Change' button is a 'Select Insurance Plan' dialog box. The dialog box has a checkbox 'Show plans for family which are not in use by the current patient.' and a table with columns: Subscriber, Ins Carrier, Date Effect, Date, Term, and Used By. The table contains one row: TEST, TEST, METLIFE, 07/24/2025, 1, 1. A red arrow points to the 'METLIFE' entry in the 'Ins Carrier' column. The 'OK' button is at the bottom right of the dialog box.

Subscriber	Ins Carrier	Date Effect	Date	Term	Used By
TEST, TEST	METLIFE	07/24/2025		1	1

3. Enter the following:
 - a. **Total Amount** estimated from insurance (*reference Tx Plan in images*)
 - b. Date of First Payment does not matter (*no need to change this if creating later*)
 - c. Enter **Number of Payments (12)** every time
 - d. Click **“Create Schedule”**
 - e. Enter **Tx Completed Amt** to match the Total Amount at top
 - f. Then **Save**

Insurance Payment Plan

Category: None
Patient: TEST, TEST
Go To

Same for all charges
Provider: Dr Nate- Coughlin, Nathan

Insurance Plan: Aetna (TEST TEST)
Date of Agreement: 07/25/2025
Change

Terms
Total Amount: 1000.00
Date of First Payment: 08/25/2025
Down Payment: 0.00
APR (for example 0 or 18): 0

Either
Number of Payments: 12
Payment Amt:

Recalculate
More Options
Create Schedule

Total Cost of Loan: 1000.00
Accumulated Due: 0.00
Paid so far: 0.00
Principal paid so far: 0.00
Tx Completed Amt: 1000.00
This should usually match the total amount of the pay plan.

Amortization Schedule								
Date	Provider	Description	Principal	Interest	Due	Payment	Adjustment	Balance
08/25/2025	Dr Nate	#1	83.34	0.00	83.34			83.34
09/25/2025	Dr Nate	#2	83.34	0.00	83.34			166.68
10/25/2025	Dr Nate	#3	83.34	0.00	83.34			250.02
11/25/2025	Dr Nate	#4	83.34	0.00	83.34			333.36
12/25/2025	Dr Nate	#5	83.34	0.00	83.34			416.70
01/25/2026	Dr Nate	#6	83.34	0.00	83.34			500.04
02/25/2026	Dr Nate	#7	83.34	0.00	83.34			583.38
03/25/2026	Dr Nate	#8	83.34	0.00	83.34			666.72
04/25/2026	Dr Nate	#9	83.34	0.00	83.34			750.06
05/25/2026	Dr Nate	#10	83.34	0.00	83.34			833.40
06/25/2026	Dr Nate	#11	83.34	0.00	83.34			916.74
07/25/2026	Dr Nate	#12	83.26	0.00	83.26			1000.00

Exclude past activity ☐ Current Totals

Note
07/25/2025 - Date of Agreement: 07/25/2025, Total Amount: 1000.00, APR: 0, Total Cost of Loan: 1000.00

+ Add + Add Adjustment → eClipboard Clear Schedule Print Save

All done!

Payment Plans											
Date	Guarantor	Patient	Typ	Category	Principal	Total Cost	Paid	PrincPaid	Balance	Due Now	eClipboard
07/25/2025		TEST, TEST	Ins	None	1,000.00	1,000.00	0.00	0.00	1,000.00	0.00	