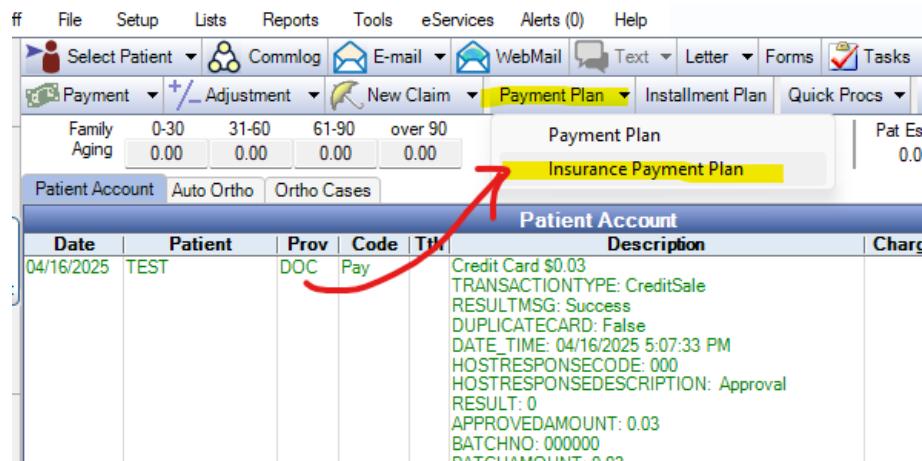
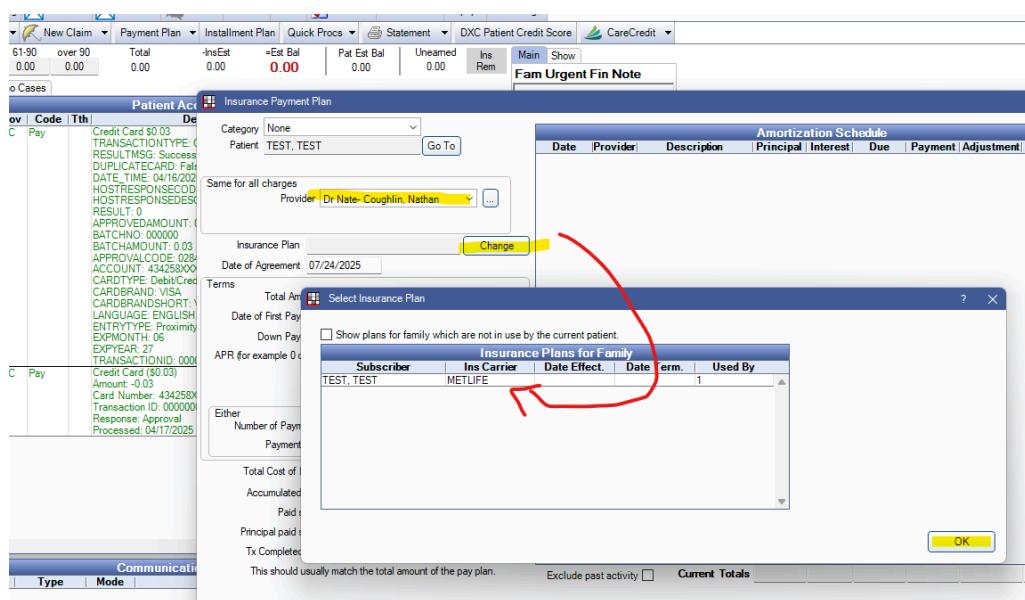


Creating an Insurance Payment Plan

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



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



3. Enter the following:

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

Insurance Payment Plan

Category	None	Go To
Patient	TEST, TEST	
Same for all charges	Provider	Dr Nate- Coughlin, Nathan
Insurance Plan	Aetna (TEST TEST)	Change
Date of Agreement	07/25/2025	
Terms	Total Amount: 1000.00 Date of First Payment: 08/25/2025 Down Payment: 0.00 APR (for example 0 or 18): 0	
	<input type="button" value="Recalculate"/> <input type="button" value="More Options"/> <input style="border: 2px solid red; border-radius: 5px; padding: 2px;" type="button" value="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	
This should usually match the total amount of the pay plan.		
<input type="checkbox"/> Exclude past activity <input type="button" value="Current Totals"/>		
Note: 07/25/2025 - Date of Agreement: 07/25/2025, Total Amount: 1000.00, APR: 0, Total Cost of Loan: 1000.00		
<input type="button" value="Add"/> <input type="button" value="Add Adjustment"/> <input type="button" value="eClipboard"/> <input type="button" value="Clear Schedule"/>		<input type="button" value="Print"/> <input style="border: 2px solid red; border-radius: 5px; padding: 2px;" type="button" value="Save"/>

All done!

Payment

Family	0-30	31-60	61-90	over 90	Total	-InsEst	=Est Bal	Pat Est Bal	Unearned	Ins Rem
Aging	0.00	0.00	0.00	0.00	-1000.00	0.00	-1000.00	-1000.00	0.00	

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	