

Creating a Patient Payment Plan

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

Open Dental (Chelsea T) - TEST, TEST - 1

File Setup Lists Reports Tools eServices Alerts (0) Help

Select Patient Commlog E-mail WebMail Text Letter Forms Tasks Label Popups Dexis VeriSmart

Payment Adjustment New Claim **Payment Plan** Installment Plan Quick Procs Repeating Charge Statement DXC Patient

Family Aging 0-30 31-60 61-90 over 90 0.00 0.00 0.00 0.00

Pat Est Bal 0.00 Unearned 0.00 Ins Rem

Patient Account Auto Ortho Ortho Cases

Date	Patient	Prov	Code	Tth	Description	Charges	Credits	Balance
12/06/2021	TEST	Dr Nate	D9986		missed appointment	0.00		0.00
12/06/2021	TEST	DOC	D9986		missed appointment	0.00		0.00
12/08/2022	TEST	DOC	Pay		Credit Card \$0.00		0.00	0.00
12/08/2022	TEST	DOC	Pay		RESULT=Transaction not completed DESCRIPTION=001 Decline: DO NOT RETRY		0.00	0.00
12/08/2022	TEST	DOC	Pay		Credit Card \$0.00		0.00	0.00
12/08/2022	TEST	DOC	Pay		RESULT=Transaction not completed DESCRIPTION=001 Decline: DO NOT RETRY		0.00	0.00
12/08/2022	TEST	DOC	Pay		Credit Card \$0.00		0.00	0.00
12/08/2022	TEST	DOC	Pay		RESULT=Transaction not completed DESCRIPTION=Declined by Host: 001 Decline: DO NOT RETRY		0.00	0.00

2. Click **"Add"** under the Production tab. Select ONE procedure code & **"OK"** (*D8090 or D8020 for Ortho -OR- just ONE general procedure code*)

over 90 0.00 Total 5000.00 -Ins Est 0.00 -Est Bal 5000.00 Pat Est Bal 5000.00 Unearned 0.00 Ins Rem

Main Show Fam Urgent Fin Note

Patient A Payment Plan

Category (None) Patient TEST, TEST Go To Go To Change

Guarantor TEST, TEST Full Lock

Terms Date of Agreement 07/25/2025 Total Principal Amount Date of First Payment 08/25/2025 Down Payment 0.00 APR (example 0 or 18) 0

Payment Amount 0.00 Number of Payments (sets per month) Charge Frequency Weekly Every other week Specific day of month Monthly Quarterly

Total Cost of Loan 0.00 Accumulated Due 0.00 Paid so far 0.00 Principal paid so far 0.00 Tx Completed Amount 0.00 Total Tx Amount 0.00

Attached Production

Date Added	Date	Provider	Description	Amount	Amount Overdue

Select Production

Production for TEST, TEST

Date	Prov	Status	Type	Amount Original	Amount End
07/25/2025	Dr Nate	Completed	D8090 CompOrtho	\$5,000.00	\$5,000.00

OK

3. ALWAYS type in the **Amount Override** totaling the FULL patient out-of-pocket (even when it's the same amount)

gent Fin Note

Go To Go To Change

Full Lock ☐

Create Schedule

Templates

07/28/2025 00.00 /28/2025 00

Schedule Production

Attached Production

Date Added	Date	Provider	Description	Amount	Amount Override
07/28/2025	07/28/2025	Dr Nate	D8090: CompOrthoAdlt - Procedure Status: C	5000.00	5000.00

4. Go to the **Schedule** tab & enter the following:
 - a. Change the **Date of First Payment** to the date of the first monthly payment
 - b. Enter the **Down Payment** amount
 - c. Enter the **Number of Payments** -OR- the **Payment Amount** for monthly charges (it won't let you add both)
 - d. Select **"Procedure as complete"**
 - e. Click **"Create Schedule"**

Payment Plan

Category: None

Patient: TEST, TEST

Guarantor: TEST, TEST

Go To Go To Change

Full Lock ☐

Create Schedule

Templates

Terms

Date of Agreement: 07/25/2025

Total Principal Amount: 5000.00

Date of First Payment: 08/15/2025

Down Payment: 399

APR (example 0 or 18): 0

Payment Amount:

Number of Payments: 20 (sets payment amount)

Charge Frequency

Weekly ☐

Every other week ☐

Specific day of month ☐

Monthly ☒

Quarterly ☐

Handle Treatment Planned

Await procedure completion ☐

Procedure as complete ☒

Total Cost of Loan: 0.00

Accumulated Due: 0.00

Paid so far: 0.00

Principal paid so far: 0.00

Tx Completed Amount: 0.00

Total Tx Amount: 0.00

Schedule Production

Amortization Schedule

Date	Description	Principal	Interest	Due	Payment	Balance
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Current Totals

Ungrouped ☐ Hide past activity ☐

Note

eClipboard Print Save

- Always use the **Note box** at the bottom to type any special payment arrangements. For General treatment, include what treatment the plan is for. Then **Save** (You may add a spot for the patient/guarantor)

Total 5000.00

Payment Plan

Category: None

Patient: TEST, TEST

Guarantor: TEST, TEST

Full Lock ☐

Terms

Date of Agreement: 07/28/2025

Total Principal Amount: 5000.00

Date of First Payment: 08/15/2025

Down Payment: 399

APR (example 0 or 18): 0

Create Schedule

Templates

Payment Amount

Number of Payments: 20 (sets payment amount)

Charge Frequency

☐ Weekly

☐ Every other week

☐ Specific day of month

☒ Monthly

☐ Quarterly

Handle Treatment Planned

☐ Await procedure completion

☒ Procedure as complete

Total Cost of Loan: 5000.00

Accumulated Due: 0.00

Paid so far: 0.00

Principal paid so far: 0.00

Tx Completed Amount: 5000.00

Total Tx Amount: 0.00

Schedule Production

Amortization Schedule

Date	Description	Principal	Interest	Due	Payment	Balance
07/28/2025	#1 Down Payment	399.00	0.00	399.00		399.00
08/15/2025	#2	230.05	0.00	230.05		629.05
09/15/2025	#3	230.05	0.00	230.05		859.10
10/15/2025	#4	230.05	0.00	230.05		1089.15
11/15/2025	#5	230.05	0.00	230.05		1319.20
12/15/2025	#6	230.05	0.00	230.05		1549.25
01/15/2026	#7	230.05	0.00	230.05		1779.30
02/15/2026	#8	230.05	0.00	230.05		2009.35
03/15/2026	#9	230.05	0.00	230.05		2239.40
04/15/2026	#10	230.05	0.00	230.05		2469.45
05/15/2026	#11	230.05	0.00	230.05		2699.50
06/15/2026	#12	230.05	0.00	230.05		2929.55
07/15/2026	#13	230.05	0.00	230.05		3159.60
08/15/2026	#14	230.05	0.00	230.05		3389.65
09/15/2026	#15	230.05	0.00	230.05		3619.70
10/15/2026	#16	230.05	0.00	230.05		3849.75
11/15/2026	#17	230.05	0.00	230.05		4079.80
12/15/2026	#18	230.05	0.00	230.05		4309.85
01/15/2027	#19	230.05	0.00	230.05		4539.90
02/15/2027	#20	230.05	0.00	230.05		4769.95
03/15/2027	#21	230.05	0.00	230.05		5000.00

Current Totals: 399.00 0.00 399.00 0.00 399.00

Note

07/28/2025 - Date of Agreement: 07/28/2025, Total Amount: 5000.00, APR: 0, Total Cost of Loan: 5000.00

Patient paying \$200 today and remaining \$199 on 08/01/2025. X

(General example):

Right Side billings (x6) & Full SRP from 07/28/2025. X

eClipboard Print Save

All done!

Payment Plan

Date	Guarantor	Patient	Typ	Category	Principal	Total Cost	Paid	PrincPaid	Balance	Due Now	eClipboard
07/28/2025	TEST, TEST	TEST, TEST	DPP	None	5,000.00	5,000.00	0.00	0.00	5,000.00	399.00	