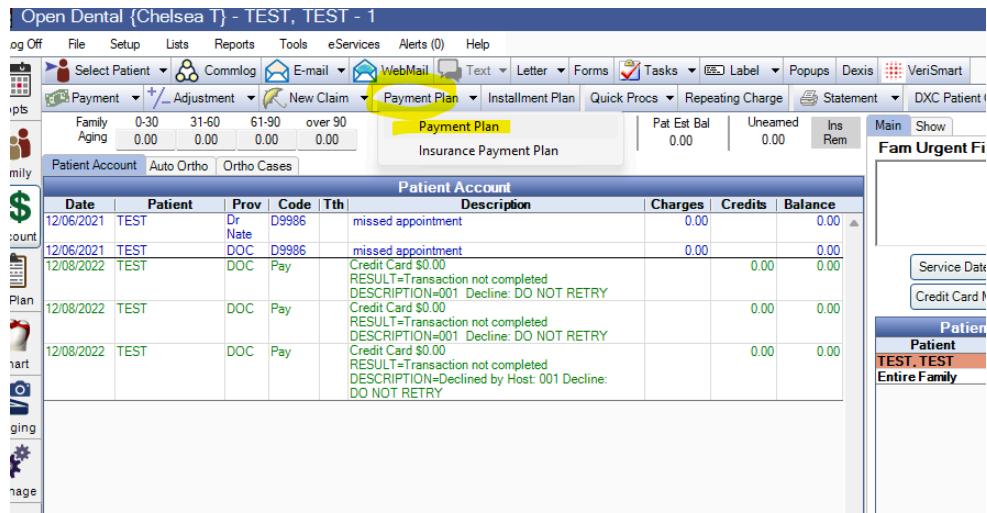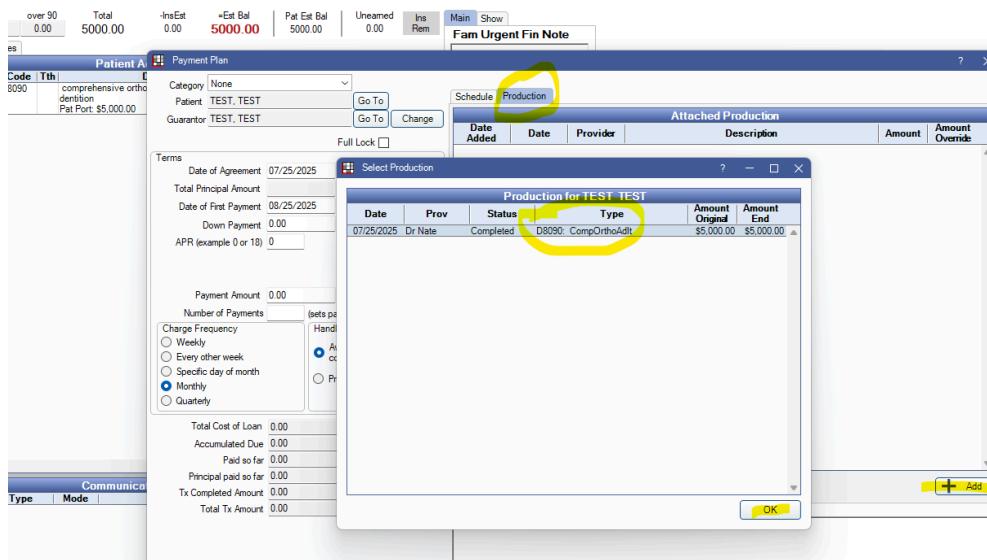# *Creating a Patient Payment Plan*

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

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

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

4. Go to the **Schedule tab** & enter the following:
   a. Change the **Date of First Payment** to the date of the first <u>monthly</u> 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**"

5. 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)*

All done!