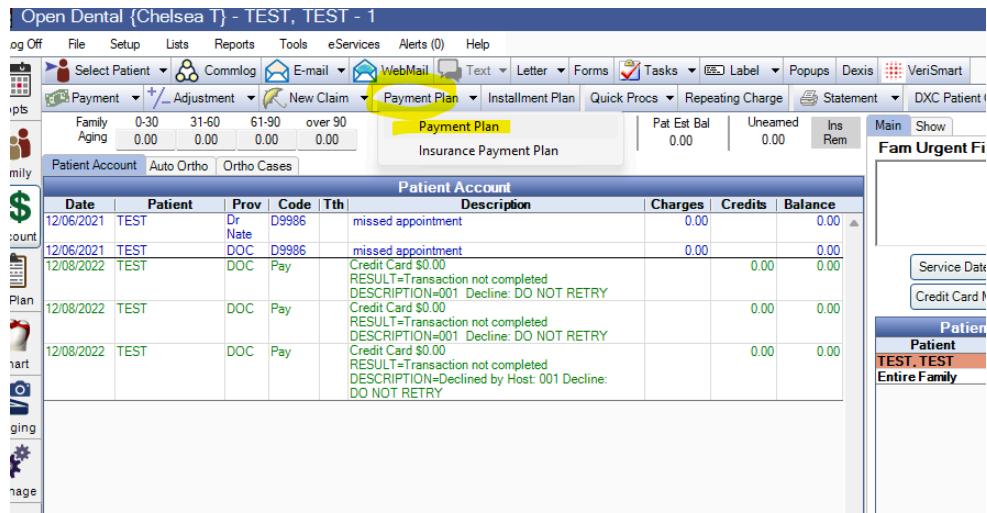
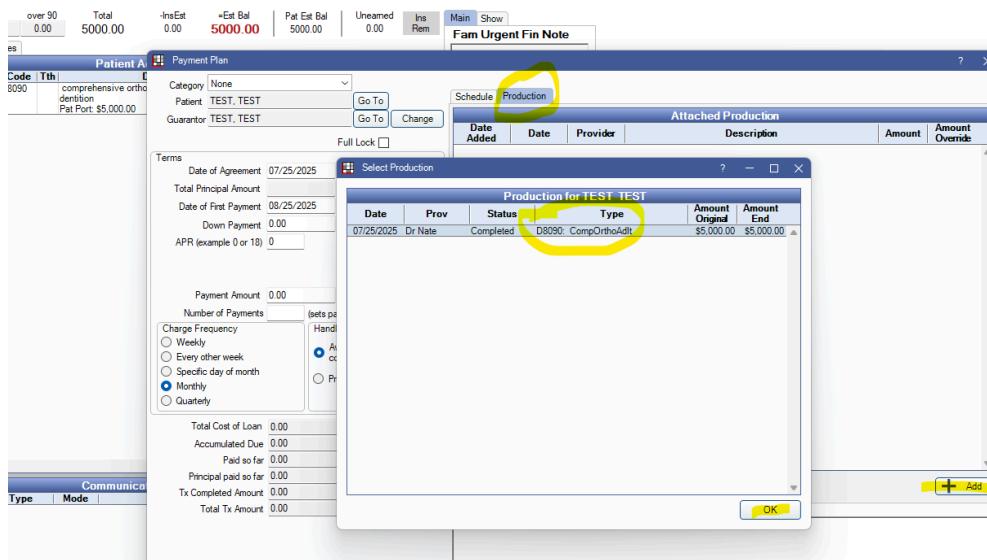


Creating a Patient Payment Plan

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 FULL patient out-of-pocket (*even when it's the same amount*)

gent Fin Note

Date Added	Date	Provider	Description	Amount	Amount Override
07/28/2025	07/28/2025	Dr. Nata	D8090: CompOrthoAdj - Procedure Status: C	5000.00	5000.00

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

Payment Plan

Date	Description	Principal	Interest	Due	Payment	Balance

Amortization Schedule

Terms

Date of Agreement: 07/25/2025

Create Schedule

Total Principal Amount: 5000.00

Date of First Payment: 08/15/2025

Down Payment: 399

APR (example 0 or 18): 0

Payment Amount: (sets payment amount)

Number of Payments: 20

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

Current Totals:

Ungrouped Hide past activity

Note:

eClipboard Print Save

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)

Screenshot of the Payment Plan window in a dental software:

Patient Account
Patient: TEST, TEST
Guarantor: TEST, TEST

Terms
Date of Agreement: 07/28/2025
Total Principal Amount: 5000.00
Date of First Payment: 08/15/2025 (highlighted with a red arrow)
Down Payment: 399
APR (example 0 or 18): 0

Payment Frequency
Weekly, Every other week, Specific day of month, Monthly (selected), Quarterly

Handle Treatment Planned
Await procedure completion, Procedure as complete (selected)

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
08/15/2025	#3	230.05	0.00	230.05		859.10
08/15/2025	#4	230.05	0.00	230.05		1089.15
11/16/2025	#5	230.05	0.00	230.05		1319.20
12/13/2025	#6	230.05	0.00	230.05		1549.25
01/10/2026	#7	230.05	0.00	230.05		1779.30
02/13/2026	#8	230.05	0.00	230.05		2009.35
03/10/2026	#9	230.05	0.00	230.05		2239.40
04/13/2026	#10	230.05	0.00	230.05		2469.45
05/10/2026	#11	230.05	0.00	230.05		2699.50
06/13/2026	#12	230.05	0.00	230.05		2929.55
07/10/2026	#13	230.05	0.00	230.05		3159.60
08/13/2026	#14	230.05	0.00	230.05		3389.65
09/10/2026	#15	230.05	0.00	230.05		3619.70
10/13/2026	#16	230.05	0.00	230.05		3849.75
11/10/2026	#17	230.05	0.00	230.05		4079.80
12/13/2026	#18	230.05	0.00	230.05		4309.85
01/10/2027	#19	230.05	0.00	230.05		4539.90
02/13/2027	#20	230.05	0.00	230.05		4769.95
03/10/2027	#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 fillings (x6) & Full SRP from 07/28/2025. X

Buttons: eClipboard, Print, Save

All done!

Screenshot of the main menu bar and a Payment Plans window:

File, **SOAP**, **Case**, **Reports**, **Tools**, **Services**, **Alerts**, **Help**

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

Payment Plans

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	