How to Enroll and Withdraw a Payment Plan

ePAY Healthcare

How to Enter a Patient into a Payment Plan

1. Login to the ePAY portal. Click on 'ePlan' at the top of the page.

2. Click on 'Enroll a Patient Into Quick Plan.'

3. If the patient is an established patient in the ePAY database, simply search for the patient by name. (If the patient is a new patient to the facility and not in the ePAY database, click on 'Enroll a New Patient.' Fill in patient information.)

4. Once desired patient is found using the Search boxes, click on the arrow to the right of the record.

5. In the box, 'Payment Plan Total,' enter the balance the patient owes.

   ▪ For established patients within the ePAY database, the patient's outstanding balance will auto populate. This is an editable field, so if the patient wishes to pay some of the balance up front and then put the remainder of the balance on a payment plan, you may change the 'Payment Plan   Total' field.

6. Enter 'Desired Monthly Payment.'

   ▪ Each facility has set parameters on the number of total payments allowed. If the patient is self-enrolling in a plan and the amount desired by the patient exceeds the number of payments allowed, the patient will be asked to contact the facility. Meanwhile, the facility is able to override the parameters at any time.

7. Select 'Monthly Payment Date' and click on 'View Schedule.'

8. Make sure patient is aware of the 'Terms and Conditions' of the payment plan. Click on box stating 'The patient has agreed to these terms and conditions.'

9. Enter the patients' preferred payment method details.

10. Click 'Enroll.'

11. The payment plan is now saved and will automatically process the patients' payments on a monthly basis.

How to Withdraw a Patient from a Payment Plan

1. Login to the ePAY portal. Click on 'ePlan' at the top of the page.

2. Click on 'View or Withdraw a Patient from Plan.'

3. Look up patient by entering Last Name, as an example.

4. Locate patient and click on the icon under 'Withdraw.'

5. Patient information will appear. Click 'Confirm Withdrawal.'

![ePAY Healthcare]

Change Client: [dropdown]

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Active Patients | **ePLAN** | **Point of Service** | **Reports**

Home Page   **Great Basin Surgical Center - GBS**

Quick Find

[_____] [→]

Home

Cashiering

Quick POS

Find Transactions

Batch Maintenance

Online Service Manager

Imports

System Setup

ePAY Portal Setup

Promotion Setup

Fulfill Orders

Voice Authorization

Event Log Viewer

Refund Approval

eRefund Customer Summary

Operator: IDCCARRIE Department: IDC Station: 000 Client: GBS

- Your last login was on Wednesday, June 3, 2015 at 11:43:50 AM.
- Your password expires in 77 days. Click here to change it.
- To change your secret question click here.

Actual Date:
Wed., Jun. 3, 2015

Business Date:
Wed., Jun. 3, 2015

Messages

Your Customer Resource Center offers training, marketing, and more. Enter epay123 as the password.

Today's Activity

Transaction Count: 0

Amount Receipted: $0.00

Payment Plan Enrollments by Staff: 0

Payment Plan Enrollments by Patient: 0

You can find training guides and more by clicking on this link and entering the password epay123.

ePay Support:

If you have any problems please call your ePAY Support Team – we are here for you!

- ▶ 1-888-640-7815

- ▶ support@epayhealthcare.com