New Look to POS Payment Posting

With the new look for POS Payment Posting, your workflow is mostly the same: when a patient or guarantor is paying their self-pay balance, you open POS Payment Posting and enter the amount they're paying for both the current visit and previous balance.

To make this workflow easier and quicker, you can use several different shortcuts to reduce the clicks you need to use to post a payment, such as selecting a line to add that amount to the Collecting field, reusing the previous reason for not collecting, and more.

Try It Out
During check-in, Saoirse Dunn would like to pay her copay for today's office visit with Becky Graveen, MD. During check-in, you open Payment Collection:

1. To automatically add the copay amount to the Collecting field in the This Visit card, you can click anywhere on that line.
2. You notice she has a previous balance, but nothing appears automatically in the Collecting field of the Previous Balance card so that you don't need to delete anything if Saoirse doesn't want to pay this balance now.
3. Her total outstanding balance now appears separately from the rest of the balance, so you can more easily tell what her outstanding balance is compared to what's due.
4. You notice the **Collect Payment** button is in the bottom right corner, instead of in the bottom center. You're not collecting anything from the previous balance, so you can click this button.

5. Because you didn't collect on her previous balance and your organization requires you to collect at least $20 toward this balance, you see the following window:

![Select reason not collecting window]

6. You click the **Use previous reason:** text to add the most recent reason you selected for this patient as a reason for not collecting. In this scenario, the most recent reason was "Requested Bill." You click **Accept**, which closes the window.

7. Click **Collect Payment** again to open the Collect Payment window:

![Collect Payment window]

8. Saoirse is paying with cash, so you select cash and then you click **Collect Payment** to finish your payment posting!