Quick Reference Guide
A Day in the Life of a Therapist

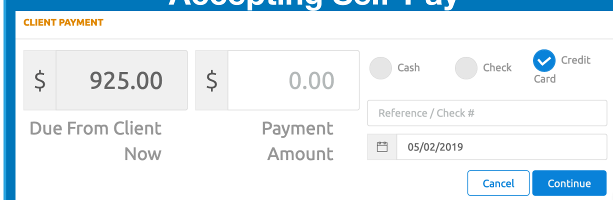
Accepting Payments

Accepting client payments is an essential aspect for any therapy practice. The steps below show you the easiest way to achieve this.

Client Payments

When working THIS...

Accepting Self-Pay



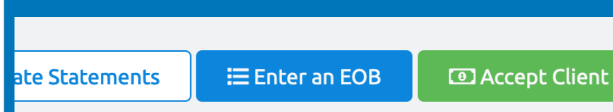
Follow these STEPS...

1. Click **My Clients** from the left-hand menu. Select your client from the list.
2. Click the **Billing** button from the top tabs.
3. Click the green **Take Payment** button on the right-hand menu**.**
4. In the **Client Payment** window, select the payment type (cash/credit/check) and enter the amount.
5. If the client has open balances, distribute the amounts in the payment columns below.

Accepting Insurance Payments

When working THIS...

Entering an Insurance Payment (Option 1)



Follow these STEPS...

1. Click **Billing & Insurance** from the left-hand menu.
2. Click the blue **Enter an EOB** button at the top right.
3. From here you will select the **Insurance** company or the **Client**.
4. Then click **Next**.
5. Select the payment type and enter a payment amount.
6. Distribute the payment and record any insurance adjustment in the columns below.
7. Click **Save EOB**.

therapyappointment

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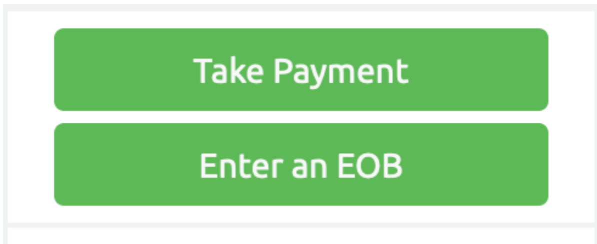
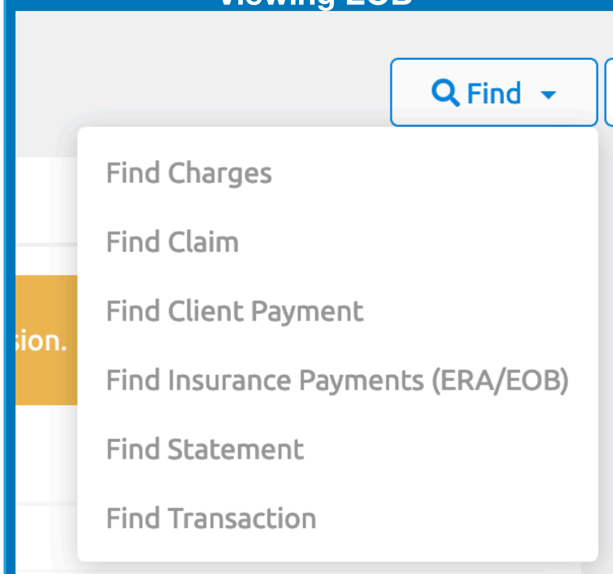
When working THIS...	Follow these STEPS...

Entering an Insurance Payment (Option 2)



1. Click **My Clients** from the left-hand menu.
2. Select your client from the list.
3. Select **Billing & Insurance** from the top tabs.
4. Click the green **Enter an EOB** button from the right-hand menu.
5. Select the payment type and enter the payment amount.
6. Distribute the payment and record any insurance adjustment in the columns below.
7. Select **Save EOB**.

Viewing EOB



1. Click **Billing & Insurance** from the left-hand menu.
2. Select **Find**>**Find Insurance Payments (ERX/EOB)** from the drop-down.
3. *Here you will see a list of all insurance payments recorded. Click on the payer you wish to view.