How to: Updox Payments Dashboard
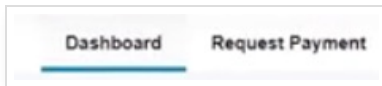
1. Access Patient Payments
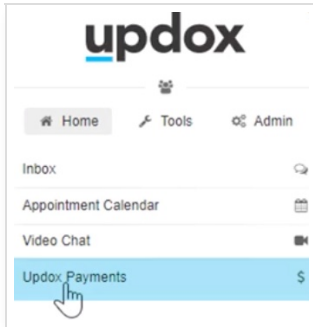
2. Navigate to the Updox Payments Dashboard by clicking "Dashboard" on the navigation bar at the top of the screen

3. The Updox Payments Dashboard is an overview of all payment requests (and their statuses) past and present.

4. Search for transactions involving a specific patient, dollar amount, requester or date by typing in the search field.

5. Click on any transaction to expand the view for more details.

6. Click on column headers to sort the view.

7. Click on the ellipsis on the right to take action on an item. Note: If your nightly reconciliation batch has not run, you will void a transaction. If it has run, you will refund the transaction. Though this image shows both options, Updox will automatically determine the best path.

9. Statuses tell the status of the items. Requested – an item that has been requested but has not been paid Cancelled – a request that has been canceled by the practice Paid – a paid item Partially Paid – the patient paid less than the amount requested Refund – a refunded item Void – a voided item.

Cancelled

Paid

Requested

Voided

Refunded

Requested

Partially Paid
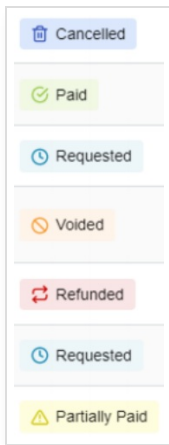
10. Taking actions on items will open a window, asking you to confirm the action. Once confirmation is made, the action will be taken and the item's status will change.

Void Payment ✕

Are you sure you would like to void the following payment?

Patient	Amount	Paid
Eric Hauter	$1.00	8/18/2021 7:36 AM

The patient has paid the request, but the payment has not yet been processed. You may void this payment now prior to it being processed.

Cancel   Void Payment