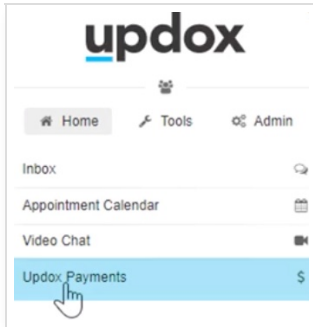


How to: Updox Payments Dashboard

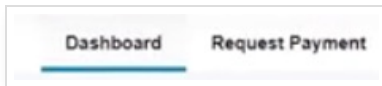


Last Modified on 06/10/2024 10:11 am EDT

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.

Patient	Amount	Status	Requested	Paid	Actions
Mickey Berry DOB: 1/1/2000	requested \$5.00	Canceled	8/20/2021 12:07 PM by Jacob Waller		
Mickey Berry DOB: 1/1/2000	-\$1.00	Refunded	8/16/2021 4:26 PM by Jacob Waller	8/16/2021 4:26 PM 5454	
Mickey Berry DOB: 1/1/2000	\$1.00	Partially Paid	8/3/2021 1:35 PM by Jacob Waller	8/3/2021 1:39 PM 5454	...
Mike Carlson DOB: 1/1/1989	-\$1.00	Refunded	8/20/2021 1:00 PM by Jacob Waller	8/20/2021 1:00 PM 1111	
Mike Carlson DOB: 1/1/1989	-\$1.00	Refunded	8/18/2021 1:59 PM by Jacob Waller	8/18/2021 1:59 PM 1111	
Mike Carlson DOB: 1/1/1989	paid \$1.00 requested \$1.00	Voided	8/16/2021 4:30 PM by Jacob Waller	8/16/2021 4:34 PM 1111	
Mike Carlson DOB: 1/1/1989	\$1.00 requested \$10.00	Partially Paid	8/16/2021 2:15 PM by Jacob Waller	8/16/2021 2:15 PM 1111	...
Mike Carlson DOB: 1/1/1989	\$1.00 requested \$15.00	Partially Paid	8/16/2021 1:20 PM by Jacob Waller	8/16/2021 1:20 PM 1111	...
Mike Carlson DOB: 1/1/1989	\$1.00	Paid	8/16/2021 1:13 PM by Jacob Waller	8/16/2021 1:13 PM 1111	...

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

Dashboard

Payment Requests

Q End

Patient	Amount
Eric Hauter DOB: 7/19/1972	\$1.00
Eric Hauter DOB: 7/19/1972	\$1.00
Eric Hauter DOB: 7/19/1972	— requested \$25.00

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

Eric Hauter DOB: 7/19/1972	\$1.00 requested \$25.00	Partially Paid	8/23/2021 9:50 AM By Jacob Walker	8/23/2021 9:50 AM 1111	⌵
Details		Activity			Actions
Payment Reason: Video Chat Co-Play Cardholder Name: Eric Hauter Batch ID: 403 Transaction ID: tx_6123a8507c5673f4e72e7b12 Authorization Code: 000053 Acquirer Message: 000AP		Payment Requested 8/23/2021 9:50 AM Payment Paid 8/23/2021 9:53 AM			Void Payment

6. Click on column headers to sort the view.

Dashboard

Payment Requests

Q hau

⌵ Patient	⌵ Amount	⌵ Status	⌵ Requested	⌵ Paid
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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, Updcox will automatically determine the best path.

3/15/2021 9:40 PM 2012	⋮
3/15/2021 3:35 PM 9850	⋮
3/15/2021 9:40 PM 1992	⋮
3/12/2021 6:22 AM 2202	⋮

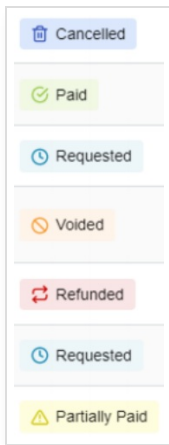
Resend request

Cancel request

Void payment

Refund payment

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.



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.

