

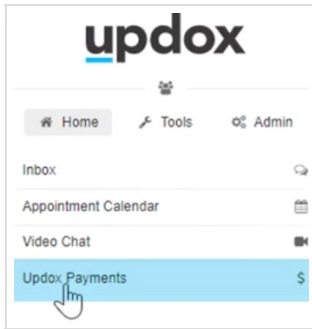
# How to: Updox Payments Dashboard



Last Modified on 07/12/2022 3:50 pm EDT

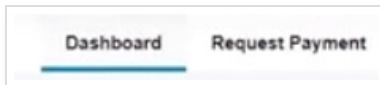
## Step 1:

Access Patient Payments



## Step 2:

Navigate to the Updox Payments Dashboard by clicking "Dashboard" on the navigation bar at the top of the screen



## Step 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<br>DOB: 1/1/2000 | —<br>requested \$5.00                | Cancelled      | 8/20/2021 12:07 PM<br>by Jacob Waller |                           |         |
| Mickey Berry<br>DOB: 1/1/2000 | -\$1.00                              | Refunded       | 8/16/2021 4:26 PM<br>by Jacob Waller  | 8/16/2021 4:26 PM<br>5454 |         |
| Mickey Berry<br>DOB: 1/1/2000 | \$1.00                               | Partially Paid | 8/3/2021 1:35 PM<br>by Jacob Waller   | 8/3/2021 1:39 PM<br>5454  | ...     |
| Mike Carlson<br>DOB: 1/1/1980 | -\$1.00                              | Refunded       | 8/20/2021 1:00 PM<br>by Jacob Waller  | 8/20/2021 1:00 PM<br>1111 |         |
| Mike Carlson<br>DOB: 1/1/1980 | -\$1.00                              | Refunded       | 8/18/2021 1:59 PM<br>by Jacob Waller  | 8/18/2021 1:59 PM<br>1111 |         |
| Mike Carlson<br>DOB: 1/1/1980 | —<br>paid \$1.00<br>requested \$1.00 | Voided         | 8/16/2021 4:30 PM<br>by Jacob Waller  | 8/16/2021 4:34 PM<br>1111 |         |
| Mike Carlson<br>DOB: 1/1/1980 | \$1.00<br>requested \$10.00          | Partially Paid | 8/16/2021 2:15 PM<br>by Jacob Waller  | 8/16/2021 2:15 PM<br>1111 | ...     |
| Mike Carlson<br>DOB: 1/1/1980 | \$1.00<br>requested \$15.00          | Partially Paid | 8/16/2021 1:20 PM<br>by Jacob Waller  | 8/16/2021 1:20 PM<br>1111 | ...     |
| Mike Carlson<br>DOB: 1/1/1980 | \$1.00                               | Paid           | 8/16/2021 1:13 PM<br>by Jacob Waller  | 8/16/2021 1:13 PM<br>1111 | ...     |

## Step 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<br>DOB: 7/19/1972 | \$1.00              |
| Eric Hauter<br>DOB: 7/19/1972 | \$1.00              |
| Eric Hauter<br>DOB: 7/19/1972 | — requested \$25.00 |

### Step 5:

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

| Eric Hauter<br>DOB: 7/19/1972   | \$1.00<br>requested \$50.00 | Partially Paid  | 8/23/2021 9:50 AM<br>By Jacob Waller | 8/23/2021 9:50 AM<br>1111 |                |
|---|-----------------------------|---|--------------------------------------|---------------------------|----------------|
| <b>Details</b>  |                             | <b>Activity</b>   |                                      |                           | <b>Actions</b> |
| Payment Reason:<br>Video Chat Co-Pay<br><br>Cardholder Name: Eric Hauter<br>Batch ID: 403<br>Transaction ID: tx_6123a8507c5673f4e72e7b12<br>Authorization Code: 000053<br>Acquirer Message: 000AP |                             | Payment Requested<br>8/23/2021 9:50 AM<br><br>Payment Paid<br>8/23/2021 9:53 AM |                                      |                           | Void Payment   |

### Step 6:

Click on column headers to sort the view.

**Dashboard**

**Payment Requests**

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| ↑ Patient | ↓ Amount | ↓ Status | ↓ Requested | ↓ Paid |
|-----------|----------|----------|-------------|--------|
|-----------|----------|----------|-------------|--------|

### Step 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.

|                           |   |
|---------------------------|---|
| 3/15/2021 9:40 PM<br>2012 | ⋮ |
| 3/15/2021 3:35 PM<br>9850 | ⋮ |
| 3/15/2021 9:40 PM<br>1992 | ⋮ |
| 3/12/2021 6:22 AM<br>2202 | ⋮ |

Resend request

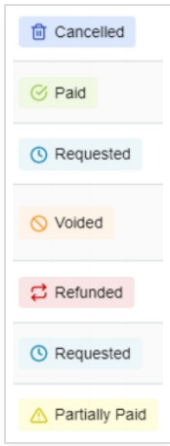
Cancel request

Void payment

Refund payment

### Step 8:

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 cancelled 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.



### Step 9:

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.

