

## The Problem

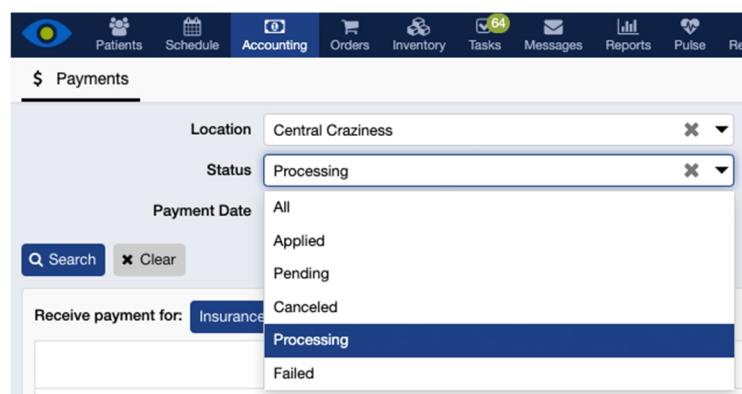
In the past, insurance payments with greater than 10 invoices, **would remain open until they finished processing, allowing users to access and make changes to invoices** during the payment process.

Unfortunately, this **led to database issues, causing performance problems** not only for the practice handling the payment but also for all practices utilizing the application.

## The Solution

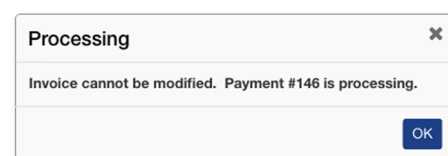
We've added **two new statuses** to the Payments Dashboard, **'Processing'** and **'Failed.'**

- ▶ For insurance payments with greater than 10 invoices, **when 'Apply Payments' is selected** the payment will close and immediately **go into a 'Processing' status**.
- ▶ Any invoices included in a payment that is in a 'Processing' status **cannot be modified** until that payment group is **finished processing successfully or fails**.



The screenshot shows the 'Payments' dashboard with a dropdown menu for 'Status'. The menu is open, showing options: 'All', 'Applied', 'Pending', 'Canceled', 'Processing' (highlighted), and 'Failed'. The 'Location' is set to 'Central Craziness' and the 'Payment Date' is 'All'. There are 'Search' and 'Clear' buttons.

- ▶ If an individual invoice is opened and it is associated to a 'Processing' payment, there will be **a warning displayed**.
- ▶ If a second payment group is opened, and that payment contains an invoice that already has a payment associated in a 'Processing' status, you will not be able to interact with the invoice in the new payment until the processing on the first payment completes.



The dialog box is titled 'Processing' and contains the message: 'Invoice cannot be modified. Payment #146 is processing.' There is an 'OK' button at the bottom right.

|                          |     |   |            |                 |          |          |         |        |        |          |
|--------------------------|-----|---|------------|-----------------|----------|----------|---------|--------|--------|----------|
| <input type="checkbox"/> | 308 | 01/06/2020  | 01/06/2020 | Daniels, Sally* | \$602.70 | \$602.70 | \$0.00  | \$0.00 | \$0.00 | \$602.70 |
| <input type="checkbox"/> | 26  | Invoice cannot be modified. Payment #146 is processing. ✖ |            |                 | \$274.00 | \$274.00 | \$ 0.00 | \$0.00 | \$0.00 | \$274.00 |
| <input type="checkbox"/> | 247 | 11/07/2019  | 11/07/2019 | Diabetes, Daisy | \$352.00 | \$352.00 | \$ 0.00 | \$0.00 | \$0.00 | \$352.00 |

- ▶ If the payment **fails processing**, you will have the option to **make changes and/or select the 'Apply Payments' button to resubmit the payment**. The **'Failed'** payment behaves the same as a **'Pending'** payment, **ensuring that no work is lost**.