Private Payments

What's New — Aug. 2026 Release Updates

Overview

Private Payments lets your agency accept credit card and ACH payments directly within Enterprise, powered by our Stripe integration. It's included in your existing subscription at no additional cost.

Previously, processing these payments meant stepping outside of Enterprise into a separate system and manually reconciling accounts receivable afterward. With Private Payments, everything is linked directly to the visit — so once a payment is received, there's no manual re-entry and far less room for error.

This guide walks through what's new, why each change matters, and how to start using it.

What's New at a Glance

1. Save Payment Method — a simpler, faster way to store a card or bank account for a patient
2. Invoicing for mileage & expenses — invoices are no longer limited to visit charges only
3. Duty sheet attachments — attach the visit's duty sheet to the invoice email
4. Adjustments on invoices and refunds — apply write-offs, travel time, or other adjustments directly
5. Clearer payment status labels and alerts — easier-to-read statuses, plus decline/dispute notifications
6. Improved invoice resend — resending automatically retires the old payment link and issues a new one

1. Save Payment Method

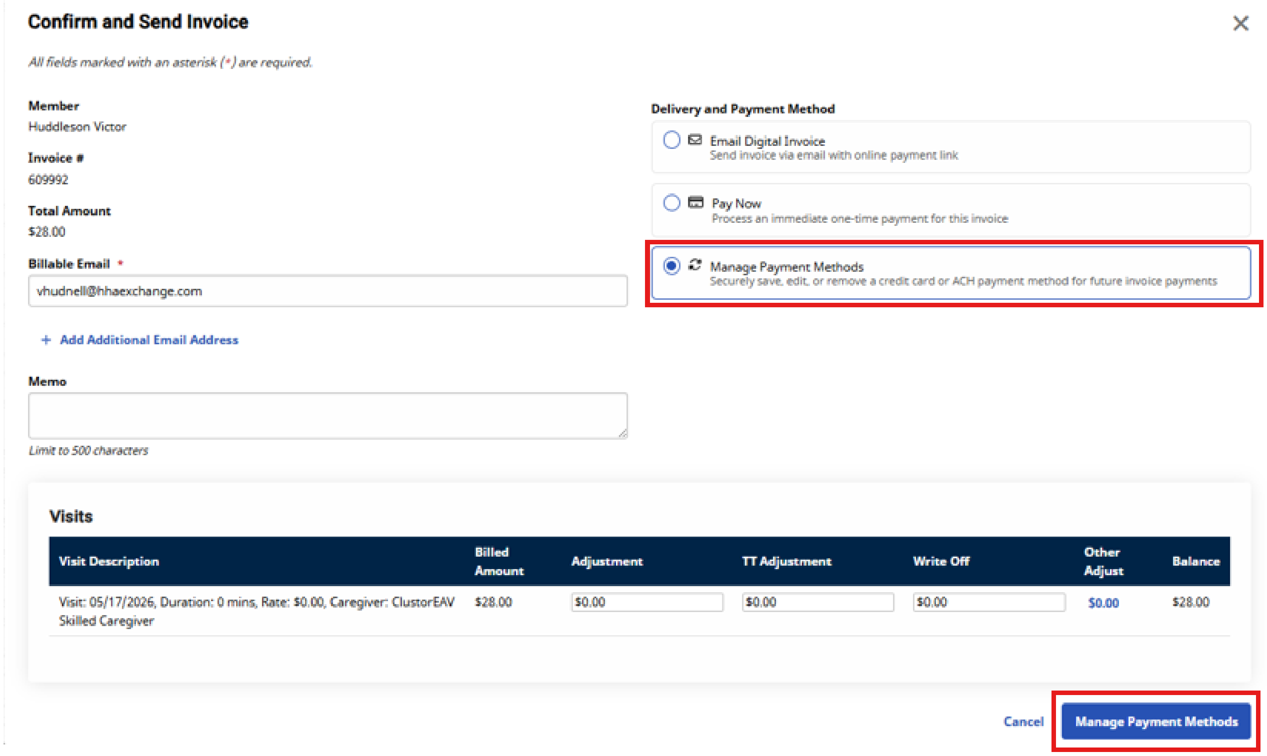
What it is

Storing a patient's credit card or bank account for future payments used to be a multi-step, convoluted workflow. It's now a single, streamlined option — renamed from "Auto Pay" to Save Payment Method — accessible directly from the invoice screen.

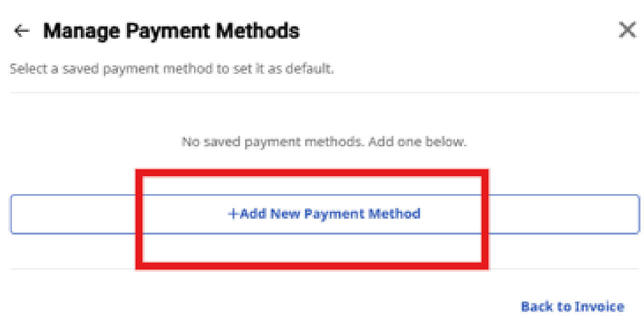
> **Why it matters:** Fewer clicks and less back-and-forth between Enterprise and Stripe means your team can set up recurring payments for a patient in a fraction of the time, with fewer opportunities for setup errors.

How to use it

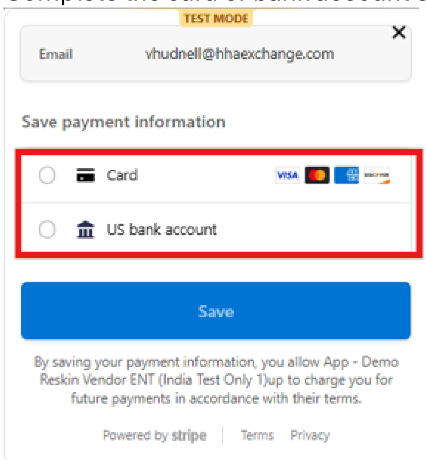
1. Open the invoice for the patient and select Manage Payment Methods (moved to a more prominent spot on the invoice screen).



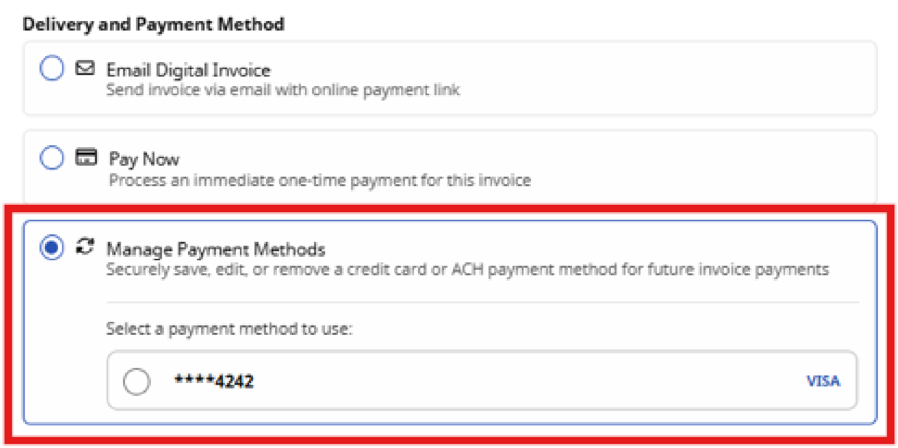
2. Choose Add Payment Method. This opens the secure Stripe UI — card and bank account details are entered and stored in Stripe, never in Enterprise.

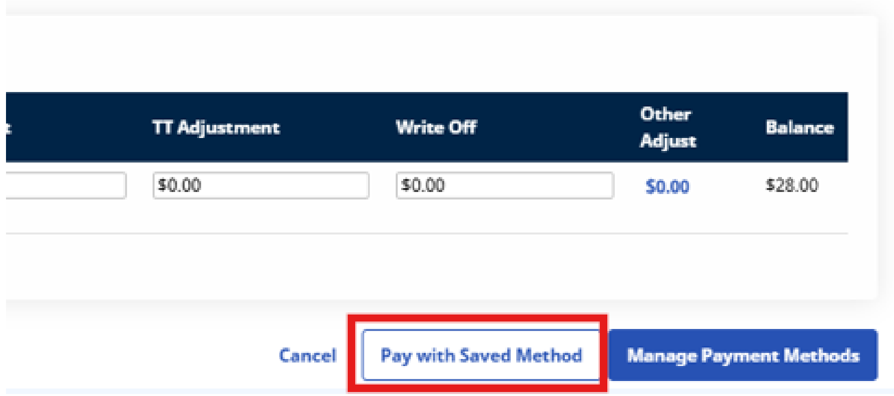


3. Complete the card or bank account entry and confirm.



4. The Delivery and Payment Method section on the invoice updates automatically, and the saved method is now available for Pay Now.





2. Invoicing for Mileage & Other Expenses

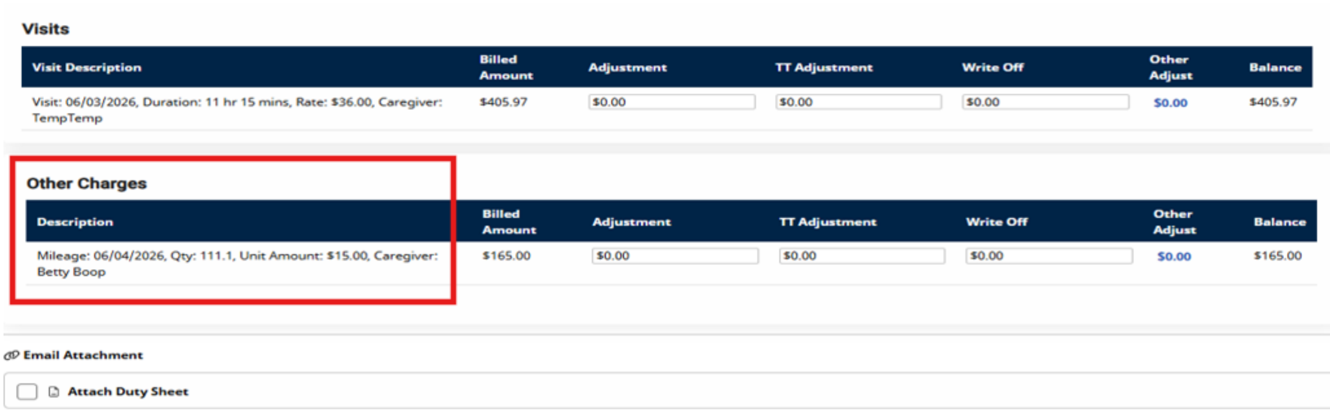
What it is

Before this release, any invoice that included charges beyond the base visit — such as mileage or supplies — could not be processed through Private Payments. That limitation has been removed: invoices with mileage and other expense line items can now be sent and paid the same way as standard visit invoices.

> **Why it matters:** Agencies no longer need a separate, manual process to collect on invoices that include mileage or supplies — everything can go through the same digital invoice and payment flow.

How to use it

1. Create the invoice as usual, including any mileage or expense line items.
2. Confirm and send the invoice — no additional setup is required to enable this.
3. The patient receives the same digital invoice email, now reflecting the full charge amount including expenses.


Visits

Visit Description	Billed Amount	Adjustment	TT Adjustment	Write Off	Other Adjust	Balance
Visit: 06/03/2026, Duration: 11 hr 15 mins, Rate: $36.00, Caregiver: TempTemp	$405.97	$0.00	$0.00	$0.00	$0.00	$405.97

Other Charges

Description	Billed Amount	Adjustment	TT Adjustment	Write Off	Other Adjust	Balance
Mileage: 06/04/2026, Qty: 111.1, Unit Amount: $15.00, Caregiver: Betty Boop	$165.00	$0.00	$0.00	$0.00	$0.00	$165.00

Email Attachment

Attach Duty Sheet

3. Duty Sheet Attachments

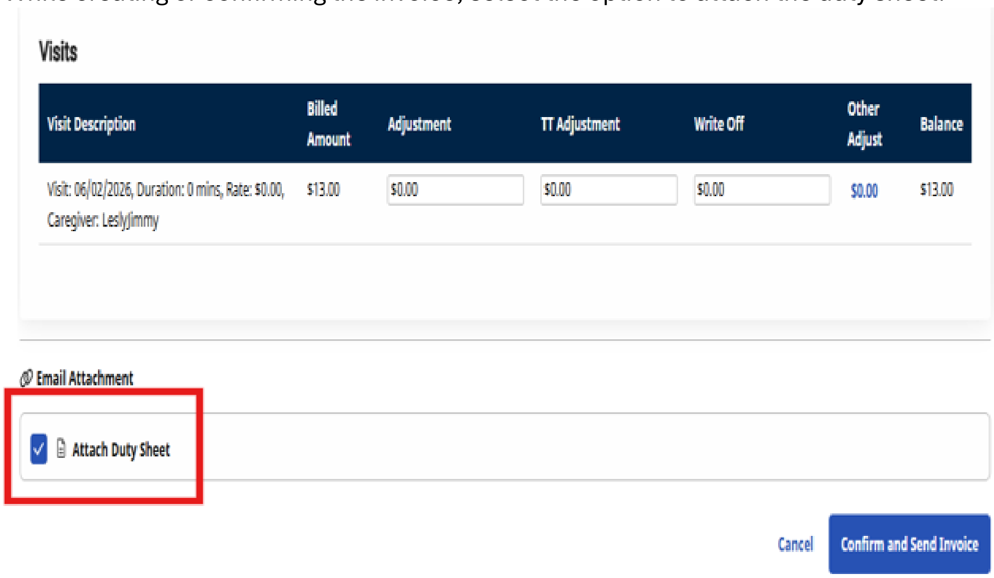
What it is

Agencies can now attach the duty sheet — the record of tasks performed during the visit — to the invoice email sent to the patient or responsible party.

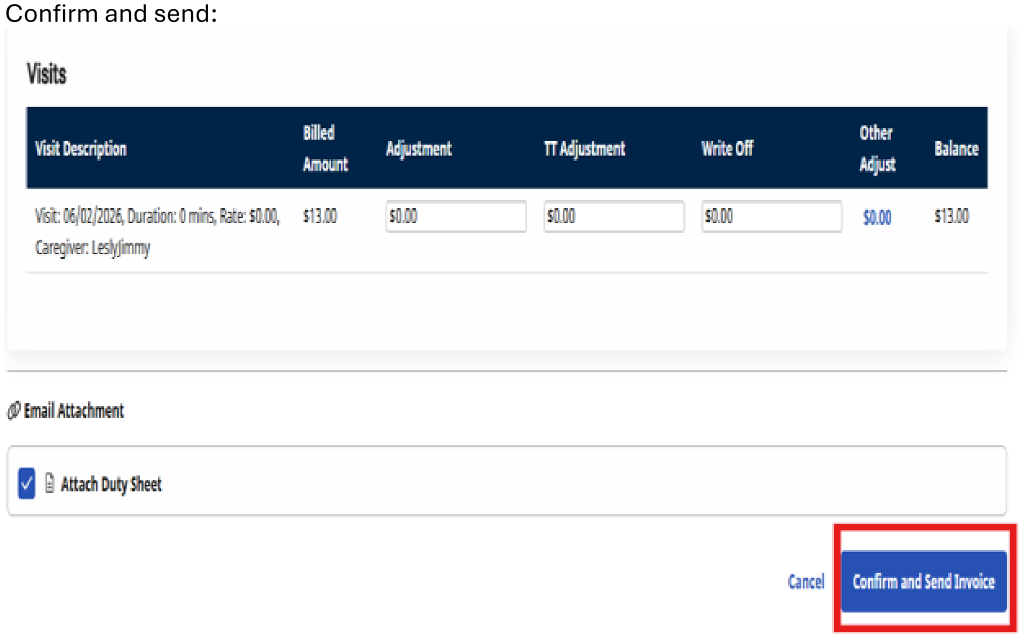
> **Why it matters:** Gives patients and responsible parties the full context for what they're being billed for, which can reduce billing questions and disputes.

How to use it

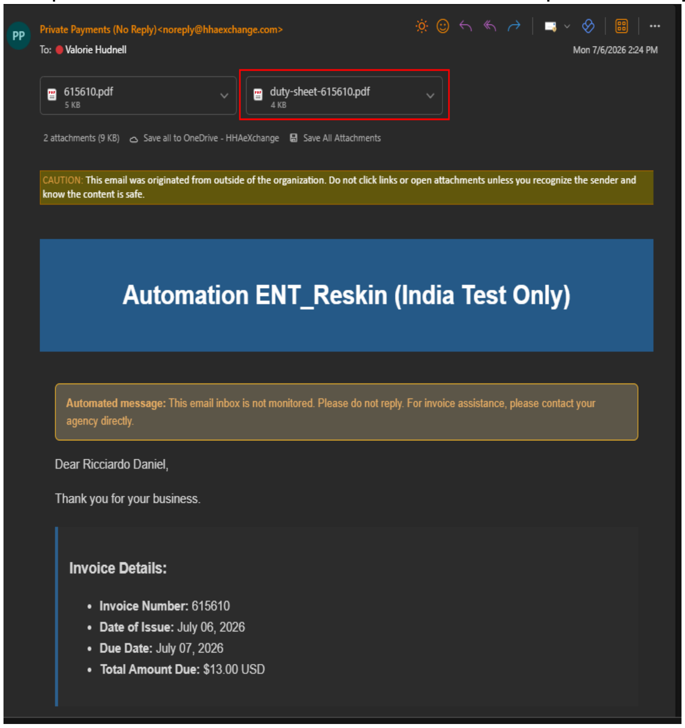
1. While creating or confirming the invoice, select the option to attach the duty sheet.



2. Confirm and send:



3. The patient's email will include the invoice PDF plus the duty sheet, matching what's on file in Enterprise.



4. This is an example of what the Duty Sheet will look like:

Duty Sheet

Invoice Number (615610) Week (05/30/2026 - 06/05/2026)

Agency :	Automation ENT_Reskin (India Test Only)	**Patient:**	Daniel Ricciardo
Office :	automation	**Address:**	Dummy Street NEW YORK NY 10001
Contract :	Private Pay	**Phone:**	
Coordinator:	Automation 20091		
Patient Number:	7816676		
Secondary Identifier:			

Caregiver	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Lesly Jimmy			02:00				

Services Provided	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Week Ending: 06/05/2026			**6/2**				
115 - Prepare-Dinner			Y				
116 - Housework/Chore			Y				
117 - Managing Finances			Y				
118 - Managing Medications			Y				
119 - Shopping			Y				
120 - Transportation			R				
TimeIn:			01:00				
TimeOut:			03:00				
Total Hours:			02:00				
EVV Time In:							
EVV Time Out:							
EVV Total Hours:							

Y - Duty Performed R - Refuse Duty Performed

Refused Duty Notes

4. Adjustments on Invoice Creation and Refunds

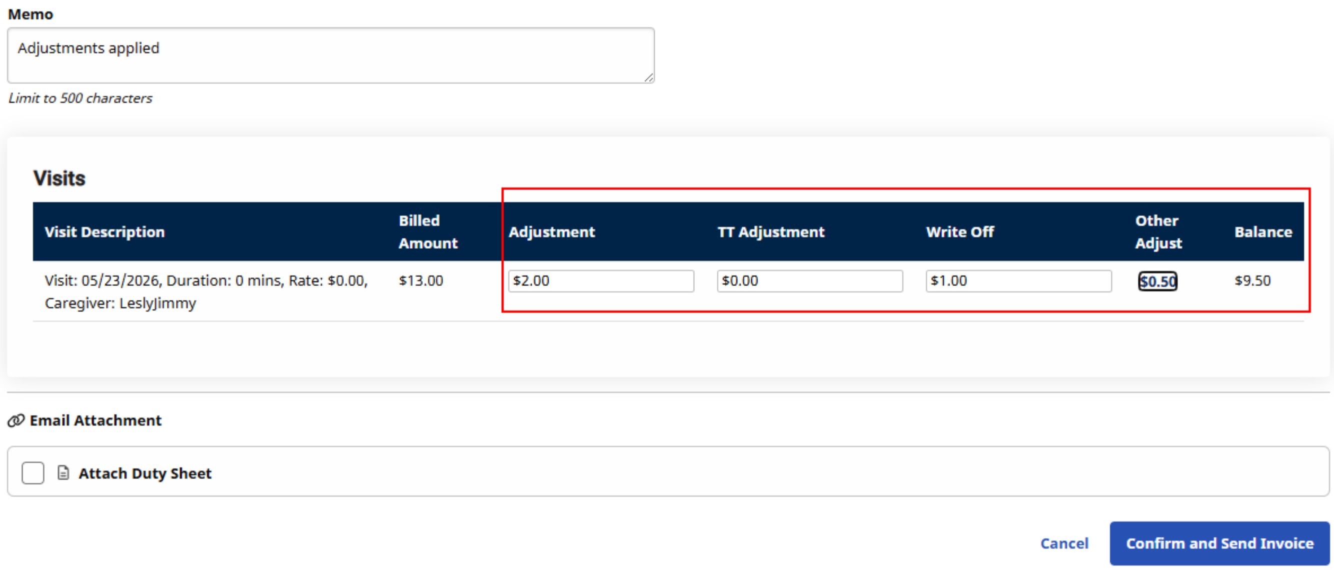
What it is

Agencies can now apply adjustments — such as travel time, write-offs, or other deductions — both when creating an invoice and when processing a refund. Refund adjustments follow the same balancing process used elsewhere in Enterprise cash posting, ensuring the balance nets to zero.

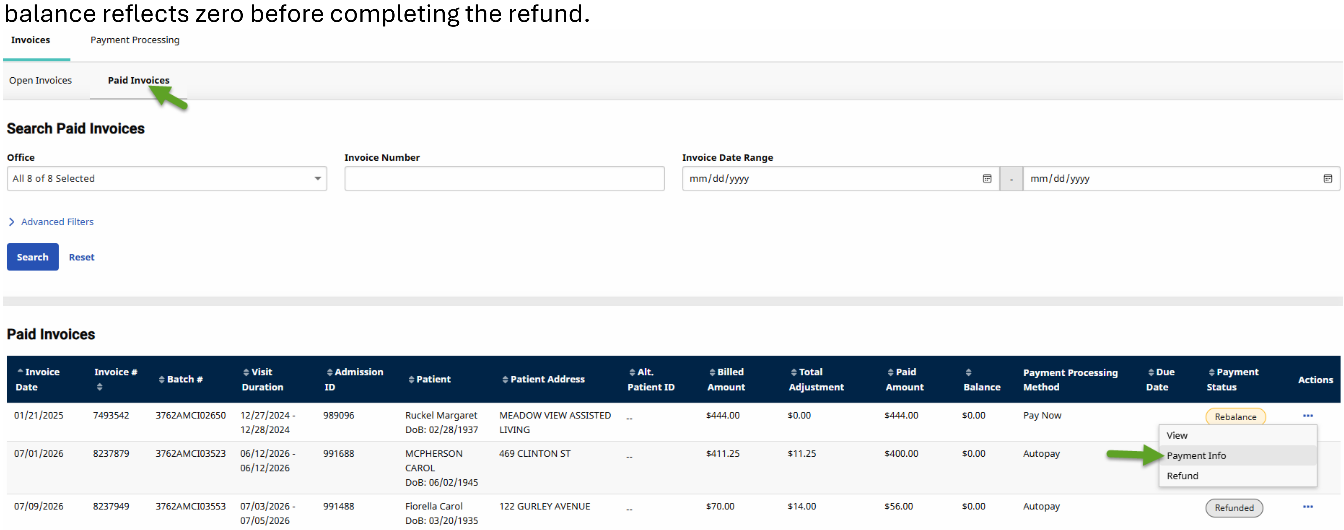
> **Why it matters:** Removes a workflow gap that previously left some agencies stuck when they needed to issue a refund or apply a deduction, so adjustments and refunds can now be completed without leaving the system.

How to use it

1. On the invoice, select the option to add an adjustment before sending.



2. Choose the adjustment type (e.g., travel time, write-off, other) and enter the amount.
3. For refunds, open the invoice's refund workflow and apply the adjustment the same way — confirm the balance reflects zero before completing the refund.



5. Clearer Payment Status & Alerts

What it is

The status that previously showed as Incomplete — meaning an invoice was sent but not yet paid — now displays as Unpaid, a clearer label. Declined or disputed payments now show a status icon (red for declined, an orange triangle for disputed); hovering over the icon shows details returned from Stripe. Agencies also receive an email notification whenever a payment is declined or disputed, in addition to the in-app indicator.

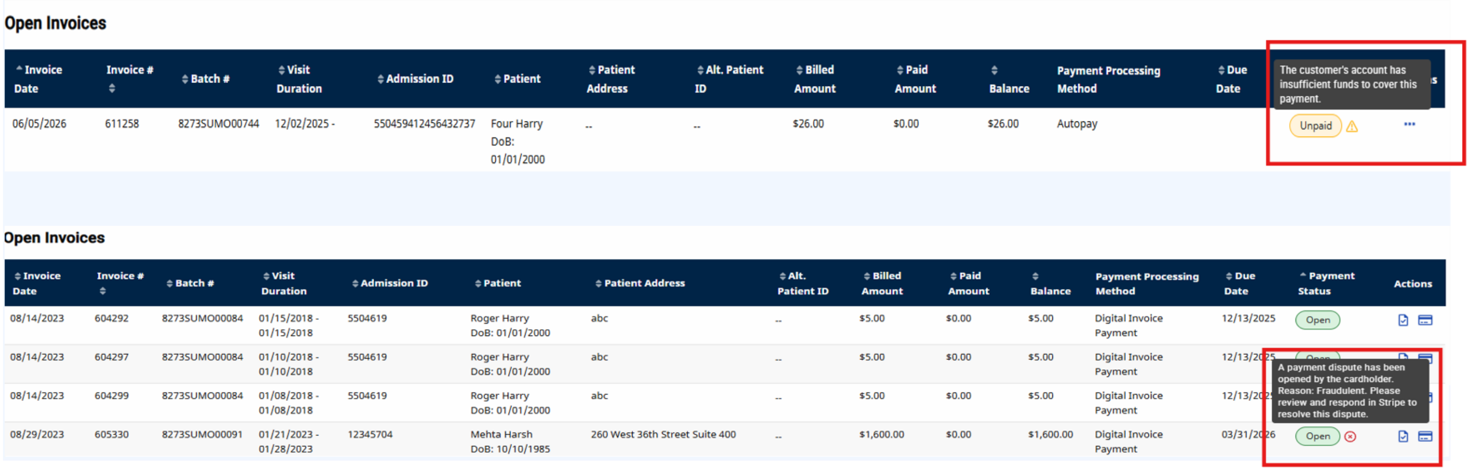
> **Why it matters:** Agency staff can tell payment status at a glance without needing to interpret ambiguous labels, and won't miss a declined or disputed payment even if they're not actively watching the screen.

How to use it

No setup needed — these status and notification changes apply automatically to the private payments processing module.

1. Check the private payments processing list for the updated status column (Undelivered, Unpaid, Paid, etc.).
2. Hover over a status icon to see the reason (e.g., decline reason) directly from Stripe.
3. Watch for an automatic email alert if a payment is declined or disputed.

Example of the Status updates:



Open Invoices

Invoice Date	Invoice #	Batch #	Visit Duration	Admission ID	Patient	Patient Address	Alt. Patient ID	Billed Amount	Paid Amount	Balance	Payment Processing Method	Due Date		
06/05/2026	611258	8273SUMO00744	12/02/2025 -	550459412456432737	Four Harry DoB: 01/01/2000	--	--	$26.00	$0.00	$26.00	Autopay		Unpaid	•••

Open Invoices

Invoice Date	Invoice #	Batch #	Visit Duration	Admission ID	Patient	Patient Address	Alt. Patient ID	Billed Amount	Paid Amount	Balance	Payment Processing Method	Due Date	Payment Status	Actions
08/14/2023	604292	8273SUMO00084	01/15/2018 - 01/15/2018	5504619	Roger Harry DoB: 01/01/2000	abc	--	$5.00	$0.00	$5.00	Digital Invoice Payment	12/13/2025	Open	
08/14/2023	604297	8273SUMO00084	01/10/2018 - 01/10/2018	5504619	Roger Harry DoB: 01/01/2000	abc	--	$5.00	$0.00	$5.00	Digital Invoice Payment	12/13/2025	Open	
08/14/2023	604299	8273SUMO00084	01/08/2018 - 01/08/2018	5504619	Roger Harry DoB: 01/01/2000	abc	--	$5.00	$0.00	$5.00	Digital Invoice Payment	12/13/202[illegible]	[illegible]	
08/29/2023	605330	8273SUMO00091	01/21/2023 - 01/28/2023	12345704	Mehta Harsh DoB: 10/10/1985	260 West 36th Street Suite 400	--	$1,600.00	$0.00	$1,600.00	Digital Invoice Payment	03/31/2026	Open	

6. Improved Invoice Resend

What it is

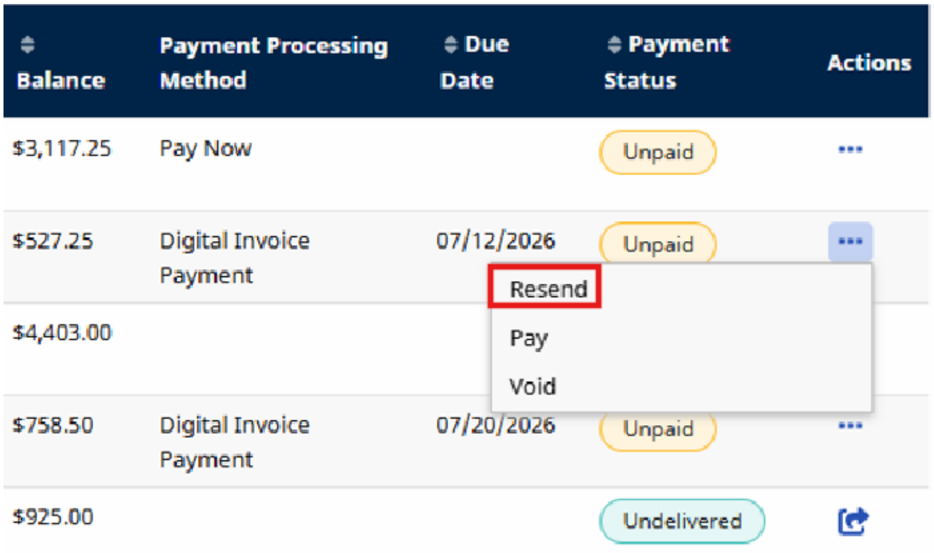
If an invoice goes unpaid and needs to be resent — for example, if the original recipient didn't receive it or it needs to go to someone else — selecting Resend now automatically deactivates the previous Stripe payment link and generates a new one. A message confirms this has happened.

> **Why it matters:** Prevents confusion or duplicate payment attempts from an old, still-active payment link, since only the newest link will work.

How to use it

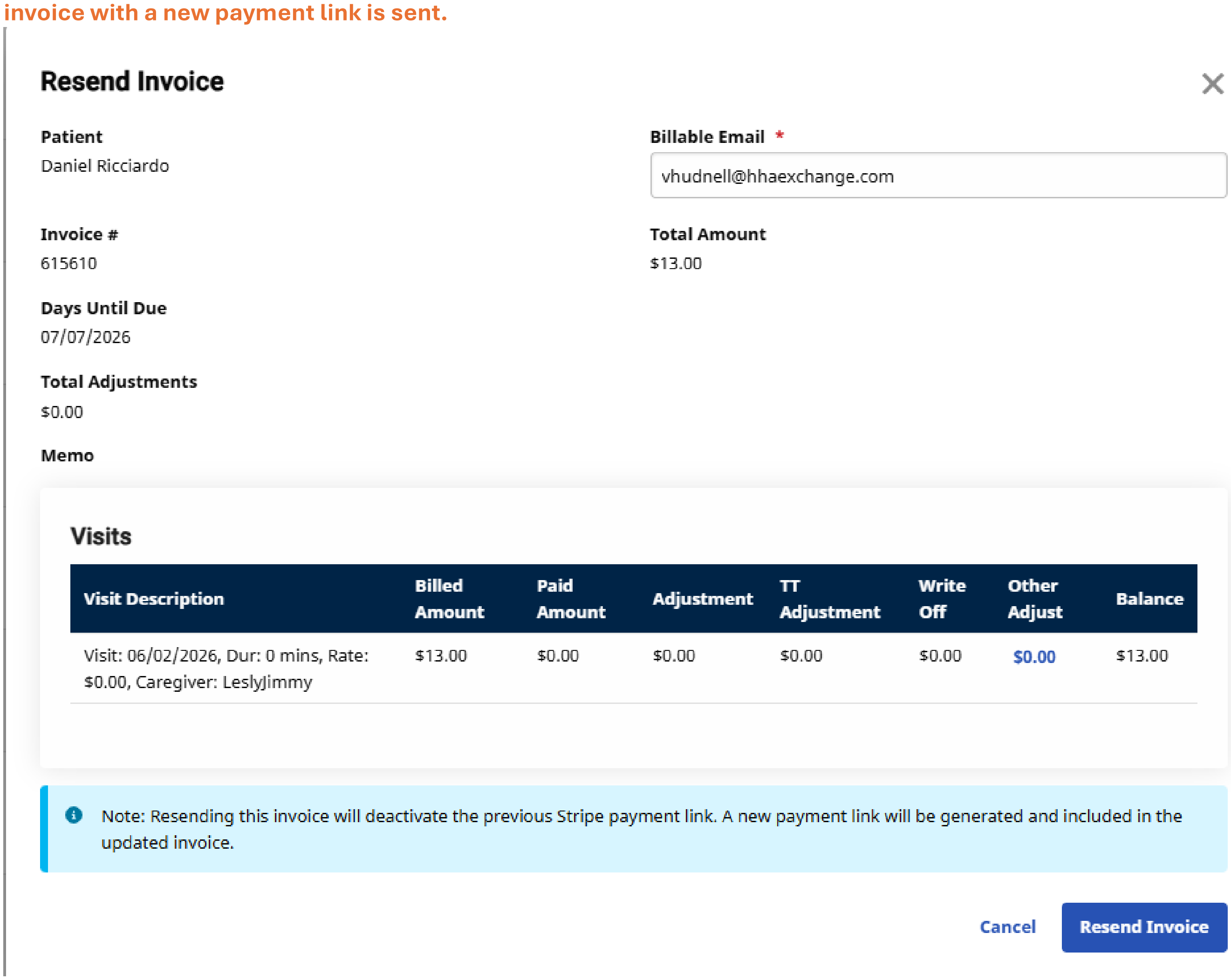
5. From the private payments processing list, locate the unpaid invoice.

6. Select Resend.



Balance	Payment Processing Method	Due Date	Payment Status	Actions
$3,117.25	Pay Now		Unpaid	•••
$527.25	Digital Invoice Payment	07/12/2026	Unpaid	•••
$4,403.00				
$758.50	Digital Invoice Payment	07/20/2026	Unpaid	•••
$925.00			Undelivered	

7. Confirm the resend when prompted. **Note: That the prior payment link is deactivated and a new digital invoice with a new payment link is sent.**



Resend Invoice

Patient
Daniel Ricciardo

Billable Email *
vhudnell@hhaexchange.com

Invoice #
615610

Total Amount
$13.00

Days Until Due
07/07/2026

Total Adjustments
$0.00

Memo

Visits

Visit Description	Billed Amount	Paid Amount	Adjustment	TT Adjustment	Write Off	Other Adjust	Balance
Visit: 06/02/2026, Dur: 0 mins, Rate: $0.00, Caregiver: LeslyJimmy	$13.00	$0.00	$0.00	$0.00	$0.00	$0.00	$13.00

Note: Resending this invoice will deactivate the previous Stripe payment link. A new payment link will be generated and included in the updated invoice.

Cancel | Resend Invoice