

How to Charge Interest

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Overview

This article will show you how to charge interest to patients showing an outstanding balance in your Aging Analysis Report

Detailed Instructions

By default, Interest is automatically checked for all patients. It does not mean that Interest will automatically be charged to the patient, but that the patient is eligible to be charged Interest if it is needed later.

Note: Since charging interest could potentially charge a large group of patients with an aging balance, if there are patients that you do not wish to charge interest, you can go to their ledger and uncheck the “Interest” box.

The screenshot shows a patient ledger for 'Zoom'. The 'Interest' checkbox is checked and highlighted with a red circle. The interface includes fields for patient information, a table of transactions, and various action buttons.

Tooth	Initial Date	Doctor	Comp Date	DI	Recall Date	ReportDate	Location
1	4/6/2021	CARR		0			TWO
9	9/17/2020	Doe	1/29/2021	0			TWO
4	9/16/2020	Doe	1/29/2021	0			TWO
4	9/4/2020	CARR		0			TWO

Ref#	Date	Tooth Ref Date	ADA Codes/Payee	Fee Description /Payment Info	Surface N/C reason	Dr User	Debit	Credit	Ins Est	Running Balance
180351	9/15/2020	4	9/16/2020	D0364	CBCT w/Interp less than jaw	3 kevin	\$100.00		\$0.00	\$100.00

To charge patients interest, first go to Reports or Reporting Tools > Financial > Charge Interest/Late Fee. You can choose to charge interest by doctor, location, or practice. Once you’ve decided that, you can choose to charge interest on accounts 30 days or older, 60 days or older, or over 90 days. Once those options have been selected, click Open ‘Charge Interest’ Report.

That will bring up this screen:

Interest/Late Fee - ARDueTot90

Click here to charge interest and or late fee

Interest % Amt to charge interest on, if \$0 does not qualify for interest:

Late Fee

Patient ID	Dr #	Loc.	First Name	Last Name	Total
120160	1	ONE	Smoke	12.200 Test	\$245.00
30: \$0.00 60: \$0.00 90+: \$245.00					
120161	1	ONE	Smoke	12.201a Test	\$155.00
30: \$0.00 60: \$0.00 90+: \$155.00					
120162	1	ONE	Smoke	12.201b Test	\$250.00
30: \$0.00 60: \$0.00 90+: \$250.00					
120163	1	ONE	Smoke	12.201d Test	\$655.00
30: \$0.00 60: \$0.00 90+: \$655.00					

Close

Record: 1 of 189 No Filter Search

From here, you can choose whether to charge a flat fee (such as \$5.00) or a percentage of the amount owed. If interest has been charged to a patient that you didn't want to charge interest to, you can always remove it by voiding it from their ledger.

Collections

If the patient is being sent to collections, you can select the collections option. It will confirm the action and then add a ledger note that the patient was "Sent to Collection."

Last Name: T1 ☐ T2 ☐ T3 ☐

First Name: Click to Paste Pre-op 1 Image Click to Paste Post-op 1 Image

Phone:

☐ Hide Alerts Menu

Tooth	Initial Date	Doctor	Comp Date	DI	Recall Date	ReportDate	Location
1	4/6/2021	CARR		0			TWO
9	9/17/2020	Doe	1/29/2021	0			TWO
4	9/16/2020	Doe	1/29/2021	0			TWO
4	9/4/2020	CARR		0			TWO

Patient Appointments Fees Ledger Insurance Medical History Summary Pain History Pain Full Mouth Probing Multi Tooth Info Diagnosis

Case Presentation Treatment Final Report Notes to Front Ledger

Filter Doctor: (All) Filter Location: (All)

Patient: Zoom, Anita

Patient has double coverage

☒ Sent to Collections ☐ Interest ☐ Hide Voided Transactions ☐ On Payment Plan

Collections

Are you sure you want to send this patient to collections?

Diagnosis Surgical Treatment Eval

Ledger Note Receive Ins. Pmt. Edit Notes Receive Payment

Online URL: <https://kb.tdo4endo.com/article.php?id=701>