

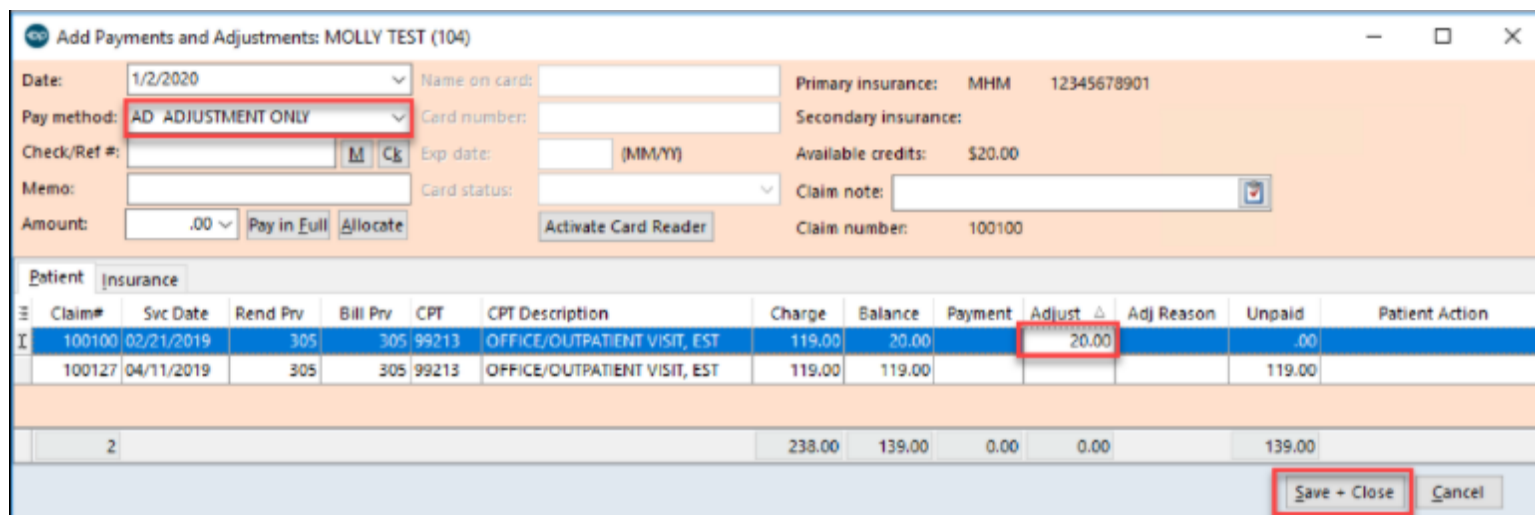
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Write Off a Patient Balance

A patient balance may be written off for a variety of reasons, including for professional courtesy, for a staff member's family, or if it is considered uncollectible.

1. From the Patient Chart navigation panel, click **Payments**.
2. Click the **New Payment** button. The Add Payments and Adjustments window is displayed.
3. Confirm you are on the **Patient** tab.
4. Select **AD Adjustment Only** from the Pay Method drop-down menu.
5. Enter the amount of the write-off in the **Adjust** column.
6. Select an adjustment reason from the **Adj Reason** drop-down menu.
7. Click the **Save + Close** button.



Add Payments and Adjustments: MOLLY TEST (104)

Date: 1/2/2020 Name on card: Primary insurance: MHM 12345678901
 Pay method: **AD ADJUSTMENT ONLY** Card number: Secondary insurance:
 Check/Ref #: Exp date: (MM/YY) Available credits: \$20.00
 Memo: Card status: Claim note:
 Amount: .00 Pay in Full Allocate Activate Card Reader Claim number: 100100

Claim#	Svc Date	Rend Prv	Bill Prv	CPT	CPT Description	Charge	Balance	Payment	Adjust	Adj Reason	Unpaid	Patient Action
100100	02/21/2019	305	305	99213	OFFICE/OUTPATIENT VISIT, EST	119.00	20.00		20.00		.00	
100127	04/11/2019	305	305	99213	OFFICE/OUTPATIENT VISIT, EST	119.00	119.00				119.00	
2						238.00	139.00	0.00	0.00		139.00	

Save + Close **Cancel**

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Move Patient Balance Back to Insurance

To move a balance from patient responsibility back to insurance responsibility:

Managing Patient Credits and Balances

QRG

1. From the Patient Chart navigation panel, click **Claims**.
2. Click the **Claim** to select it.
3. Click the **Revert Pat Resp** button.

Note: If you selected an individual claim line, you will need to follow these steps for each line of the claim that needs to be reverted.

4. Click **OK** in the confirmation window. The balance is moved from patient responsibility back to insurance responsibility.

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Apply Unallocated Patient Credits to Balances

When patient payments are collected, they are entered into OP as unallocated credits. To apply an unallocated patient credit to a balance:

1. From the Patient Chart navigation panel, click **Payments**.
2. Click the **New Payment** button. The Add Payments and Adjustments window is displayed.
3. Confirm you are on the **Patient** tab. The available credit amount is displayed below the insurance payer information.
4. Ensure that **PC Patient Credit** is selected from the **Pay method** drop-down menu.
5. Enter the **credit amount** that should be applied to each claim in the **Payment** column.

Add Payments and Adjustments: SARAH TEST (103) Sex: F DOB: 08/02/2014 Age: 4 yrs. 11 mos. Ins: AETNA PPO

Date: 7/5/2019 Name on card: Primary insurance: APP 126312387123

Pay method: PC PATIENT CREDIT Card number: Secondary insurance:

Check/Ref #: M Ck Exp date: (MM/YY) Available credits: \$30.00

Memo: Card status: Claim note:

Amount: 30.00 Pay in Full Allocate Activate Card Reader Claim number: 100131

Patient		Insurance										
Claim#	Svc Date	Rend Prv	Bill Prv	CPT	CPT Description	Charge	Balance	Payment	Adjust	Adj Reason	Unpaid	Patient Action
100131	03/05/2019	305	305	99213	OFFICE/OUTPATIENT VISIT, ES	119.00	119.00	30.00	.00		89.00	
						1	119.00	119.00	30.00	0.00	89.00	

Save + Close Cancel

- Click the **Save + Close** button.

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Transfer Credits Between Siblings

Family credits can easily be transferred among siblings that are financially linked. Financially linked patients are those that share the same Patient Responsibility Guarantor as indicated in the Insurance section of the Patient Chart.

- Navigate to the Patient Chart of the patient that has the balance and needs a credit from a sibling.
- From the Patient Chart navigation panel, click **Credits**.
- Click the **New Credit** button. The Patient's Credit Account window is displayed.

Patient's Credit Account

Deposit
Ledger

Date: 4/16/2019
Pay method: Family transfer

Activate Card Reader

Transfer All
Balance Owed

Family Member	Available	Transfer
WILLOW	25.00	.00

Credit amount:

Patient:
Insurance:
Payer:
Ins

Credit source:
Note:
Provider:

Patient
Insurance

Credit account balances:
\$0.00
\$0.00

Save on File
Save / Post
Cancel

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4. Select **Family transfer** from the **Pay method** drop-down menu. The Family Transfer grid is displayed listing the available credits in all of the patient's siblings' accounts.
5. Enter the **amount** of the credit being transferred from the sibling(s) in the **Transfer** field or click the **Transfer All** or **Balance Owed** button, as appropriate.
6. Click the **Save / Post** button. Both the patient and sibling credit accounts are credited/debited accordingly.

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