

Important Content Update Message



We are currently updating the OP Help Center content for the release of OP 20. We appreciate your patience as we continue to update all of our content. To locate the version of your software, navigate to: **Help tab > About**

Post a Patient Payment

Last Modified on 04/08/2020 4:16 pm EDT

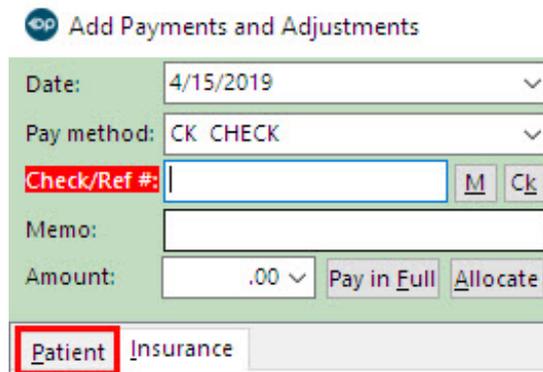
Version 14.19

Overview

Patient payments are either posted directly or by applying patient credits.

Post a Patient Payment

1. Navigate to the patient's chart.
2. Click **Payments** in the Window Navigation Panel.
3. Click the **New Payment** button. The Add Payments and Adjustments window is displayed.
4. If the **Insurance** tab is selected and the backdrop of the window is green, click the **Patient** tab.



5. From the Pay Method drop-down, select the **pay method** that is being used to post the payment. If the payment is being applied from the patient's credits, select **PC Patient Credit**
6. Enter the **Payment Amount** in the Payment field on the appropriate claim line.



Tip: The **Pay in Full** button may be used to quickly apply the full amount owed on each respective claim line.

Add Payments and Adjustments

Date: 4/15/2019 Name on card: Primary insurance: BPC 123456789
 Pay method: CK CHECK Card number: Secondary insurance:
 Check/Ref #: 1001 Exp date: (MM/YY) Available credits: \$0.00
 Memo: Card status: Claim note:
 Amount: 172.00 Pay in Full Allocate Activate Card Reader Claim number: 100142

Patient		Insurance					Charge	Balance	Payment	Adjust	Adj Reason
Claim#	Svc Date	Retd Prv	Bill Prv	CPT	CPT Description						
100142	03/06/2019	1841	305	99393	PREV VISIT, EST, AGE 5-11 YRS	172.00	172.00	172.00			



Note: To accurately post patient adjustments, the Pay Method selected should be **Adjustment Only** (if a payment is not also being posted), and the adjustment amount should be entered in the Adjust field. The Adj Reason field is used to reflect the reason (selected from the drop-down menu) for the adjustment.

7. Click the **Save + Close** button to save your work and exit the window.