

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**

View a Family Account Balance

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

Version 14.19

Overview

Account balances for patients who have been linked financially are viewed in the **Account Summary** of the patient chart. For more information on the methods for linking families, visit [Linking Families in OP](#).

View Family Balances

1. Navigate to the patient chart of one of the financially linked patients.
2. Click **Account Summary** in the Window Navigation Panel.
3. In the **Owes** section of Charges/Aging, view the family balance. To see the breakdown of balance per patient, locate the **Bal Owed** column in the Financial Family section of the window.



Account Summary

PCP: SLOANE KNOX, MD Copay: \$0.00 Statements: Send to: KAI ENGLISH
 Prim Ins: CPP CIGNA PPO CIG012345678 Well: Method: MAIL
 Sec Ins: Special: \$0.00 Credit Card on file
 Status: Active After hrs: Name: None
 VFC: NO Co-ins %: \$0.00 Card #:

Financial Family (guarantor in bold):

Name	Role/Reason	Bal Owed	Credit Bal
FREDDIE ROWAN ENGLISH	Mother	\$0.00	\$0.00
KAI SAGE ENGLISH	Father	\$0.00	\$0.00
ATHENA J ENGLISH		\$0.00	\$0.00
LILY G ENGLISH		\$177.00	\$0.00
MADILYNN M ENGLISH		\$0.00	\$0.00

Charges / Aging:

	Patient	Insurance
OWES		
Patient:	\$0.00	\$715.00
Family:	\$177.00	\$1,461.00
CREDITS		
Patient:		\$65.00
Family:		\$425.00
AGING		
< 30:		
31-60:		
61-90:		
> 90:		\$715.00

Billing Notes:

Version 14.10

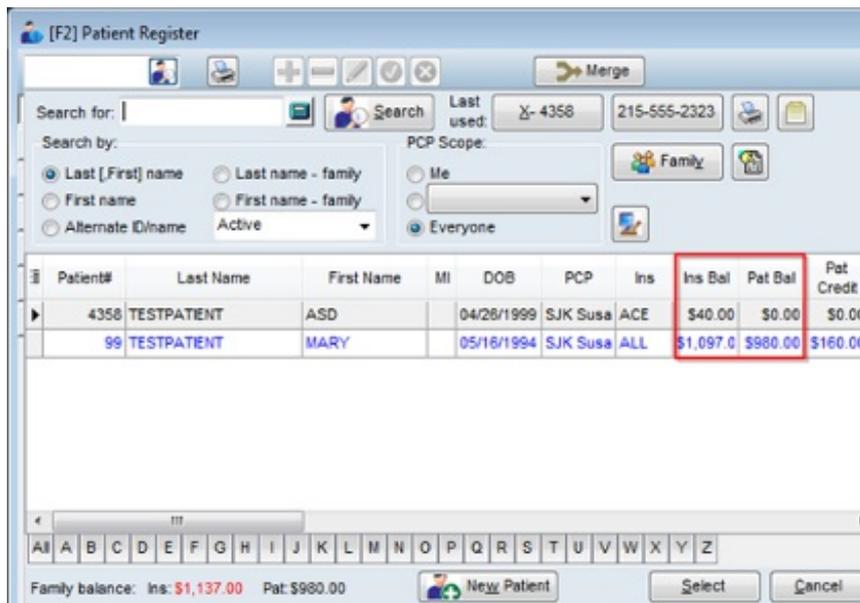
Overview

Family account balances can be viewed on both the **Patient Directory** window and the **Patient Account** window (of any linked family member). For more information on linking families,

visit [Linking Families in OP 14](#).

View a Family Account Balance from the Patient Directory

1. Click on the **Register** button  to open the **Patient Register**.
2. In the **Search** box  type in the name of the patient and click the **Patient Search** button .
3. Click on the **Family** tab. This button will show the patients who have the same mother or father or are marked as residing with the selected patient.



View a Family Account Balance from the Patient Account

1. Click on the **Account** button .
2. View **Family Owed** under **Charges/Aging**. The Family Owed amount includes the balance due from the patient you are viewing.

