# Patient Chart: Account Summary

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Version 14.19

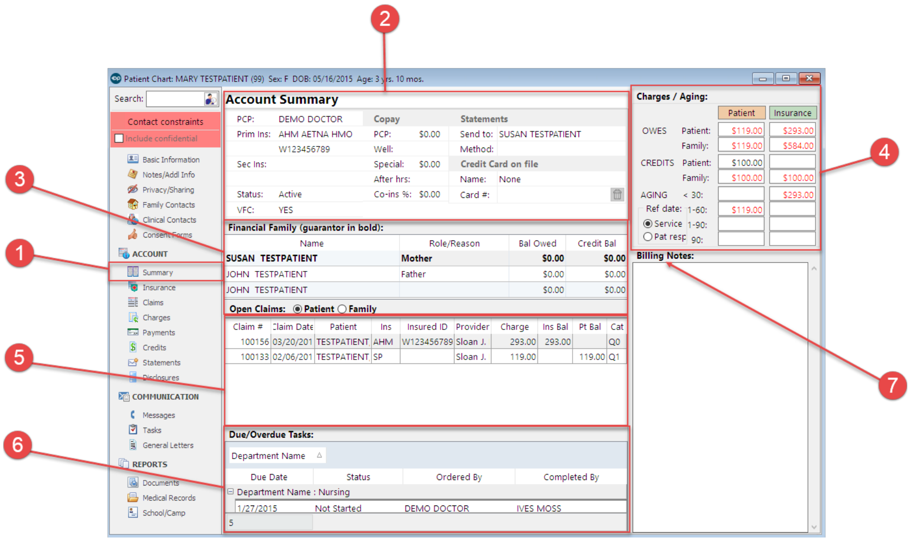
*This window map article points out some of the important aspects of the window you're working with in OP but is not intended to be instructional. To learn about topics related to using this window, see the **Related Articles** section at the bottom of this page.*

## About Patient Chart: Summary (Account Summary)

**Path: Clinical tab, Practice Management, or Billing tab > Patient Chart button > Summary**

The Account Summary window provides an overview of the patient's account.

**Note**: Just like a paper chart, the electronic chart in OP contains personal health information and should be kept protected and confidential. Always close all windows on your screen and log out of OP when you are not at your workstation.




## Patient Chart: Overview Map

| Number | Section | Description |
|---|---|---|
| 1 | Summary button | The Summary button opens the Account Summary window in the patient's chart. |
| 2 | Account Summary Information | The Account Summary Information fields display the patients basic billing information including:<br>• Primary Care Provider<br>• Primary Insurance<br>• Status<br>• VFC<br>• Copay information<br>• Statement recipient and delivery methods<br>• Credit Card on file information |

| | | |
|---|---|---|
| 3 | Financial Family | The Financial Family lists patients that have the same guarantor as selected in the Insurance section of the Patient Chart. |
| 4 | Charges/Aging | The Charges/Aging section displays a summary of charges, credits, and aging for the patient, family, and insurance. |
| 5 | Open Claims | The Open Claims section displays a list of the patient's open claims, by patient or family. Double-clicking listed claims takes you directly to the Claims window of the patient's or sibling's chart. |
| 6 | Due/Overdue Tasks | The Due/Overdue Tasks section lists the patient's outstanding tasks. |
| 7 | Billing Notes | The Billing Notes field is populated by what is entered into the Notes'Addl Info section of the chart but new Billing Notes can also be added here. Notes entered here are displayed in the Add/Edit Appointment window. |

Version 14.10

# About Patient Account: Overview Tab

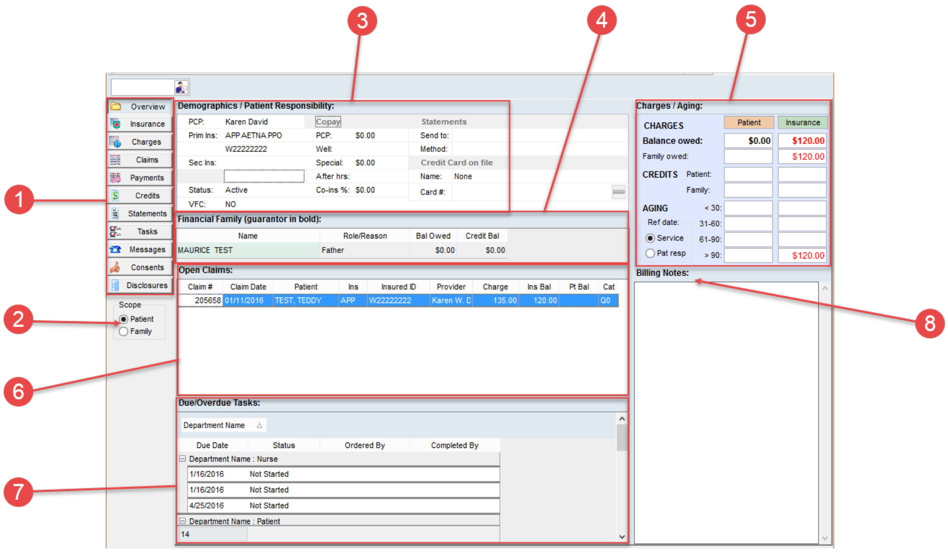
**Path: Smart Toolbar > Account button > Overview tab**

The Patient Account window maintains a patient’s account.  Some of the main functions that can be performed on a patient’s account include:

- Enter a copay
- Post a charge manually
- Enter hospital charges
- Verify claim accuracy
- Post a patient payment
- Issue a patient refund
- Write an account note
- View claim history
- Print a CMS-1500
- Print a statement

The Overview tab provides an overview of the patient's account.  This includes:

- Basic demographics
- A list of family members (which opens the Patient Register form when selected)
- The full contents of the Billing Note from the Register Form (which opens the Patient Register: Notes and Coordination of Care window when selected)
- A summary of charges and aging
- A synopsis of patient responsibility based on the primary insurance policy
- A list of the patient’s open claims (which opens the Claims tab when selected)
- A list of due and overdue tasks



## Patient Account: Overview Tab Map

| Number | Section | Description |
|---|---|---|
| 1 | Patient Account tabs | The Patient Account contains the following tabs:<br>• **Overview**<br>• **Insurance**<br>• **Charges**<br>• **Claims**<br>• **Payments**<br>• **Credits**<br>• **Statements**<br>• **Tasks**<br>• **Messages**<br>• **Consents**<br>• **Disclosures** |
| 2 | Scope | The Scope field narrows the parameters for the displayed information in the patient's account. Information can be displayed by patient or family. |
| 3 | Demographic/Patient Responsiblity | The Demographic/Patient Responsiblity fields display the patients basic billing information including:<br>• Primary Care Provider<br>• Primary Insurance<br>• Status<br>• VFC<br>• Copay information<br>• Statement recipient and delivery methods<br>• Credit Card on file information |
| 4 | Financial Family | The Financial Family lists patients that have the same guarantor. The guarantor is selected on the insurance tab for the patient and is in bold text in the Financial Family list. |
| 5 | Charges/Aging | The Charges/Aging Panel displays a summary of charges and aging for the patient, family, and insurance. This includes charges, credits, and aging information. The left column displays the patient/family financial responsibly/credits. The right column displays the insurance responsibility/credits. |

| | | |
|---|---|---|
| 6 | Open Claims | The Open Claims field displays a list of the patient's open claims.  Clicking this field open the Patient Account: Claims tab. |
| 7 | Due/Overdue Tasks | The Due/Overdue tasks panel lists the patient's outstanding tasks. |
| 8 | Billing Notes | Double-click on the Billing Notes box to open the Patient Register: Notes and Coordination of Care window.  Account notes for that patient can be entered in this location.  You can include a 'stop code' in billing notes that require review by the front desk or staff who will be scheduling appointments or checking in patients. Insert a stop code ("@@") at the beginning of a billing note about the issue. The next time the front desk staff attempt to schedule or check-in the patient, the note will appear on the screen. |