

Important Content Update Message
 We are currently updating the OP Help Center content for OP 20. We appreciate your patience as we continue to make these updates. To locate the version of your software, navigate to: **Help tab > About**

Move a Patient Balance Back to Insurance

Last Modified on 12/07/2020 2:37 pm EST

Version 20.8

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

Overview

Balances that have been dropped to Patient Responsibility but that need to be reflected as Insurance Balances can easily be reverted from the Claims section of the Patient Chart.

Revert Patient Responsibility

1. Navigate to the patient's Claims by following the path above.
2. Click to select the claim or claim line that needs the Patient Responsibility reverted. If selecting an individual claim line, you will need to follow these steps for each claim line that needs the Patient Responsibility reverted.

Claims																					
Edit		Void		Rebuild		Change Payer		Revert Pat Resp		F/U Task		Recoup		Proof		CMS-1500		Q Prim		Q Sec	
Status:				Date range:																	
<input checked="" type="radio"/> All <input type="radio"/> Due <input type="radio"/> Prf?				<input checked="" type="radio"/> All <input type="radio"/> < 30 <input type="radio"/> 31-60 <input type="radio"/> 61-90 <input type="radio"/> > 90				<input type="checkbox"/> Include voids		<input type="checkbox"/> Expand all											
Claim #	Claim/Pay Date	Proc/Pay Type	Ins Proof	Pat Proof	Primary Insur	Second Insur	Charge	Patient Balance	Insurance Balance	Patient Owed	Patient Payment	Patient Adjmnt	Insurance Payment	Insurance Adjustmt							
100045	12/07/2020				MED		125.00	10.00		10.00			55.97	59.03							
	12/07/2020	99213	OFFICE/OUTPATIE		MED		125.00	10.00		10.00											
	12/07/2020	1	PAYMENT		MED				(55.97)				55.97								
	12/07/2020	1	ADJUSTMENT		MED				(59.03)					59.03							
	12/07/2020	4	PATIENT RESPONS		MED			10.00	(10.00)	10.00											

3. Click the **Revert Pat Resp** button.
4. Click **OK** to confirm you want to revert the patient responsibility for the entire selected claim or selected transaction (based on your selection). The amount previously displayed in the Patient Owed column is moved to the Insurance Balance column. You can then proceed with queuing the claim to go to the appropriate Insurance payer or apply an Insurance adjustment, if applicable.

Claim #	Claim/Pay Date	Proc/Pay Type	Ins Proof	Pat Proof	Primary Insur	Second Insur	Charge	Patient Balance	Insurance Balance	Patient Owed	Patient Payment	Patient Adjmnt	Insurance Payment	Insurance Adjustmt
100045	12/07/2020				MED		125.00		10.00				55.97	59.03
	12/07/2020	99213	OFFICE/OUTPATIE		MED		125.00		10.00					
	12/07/2020	1	PAYMENT		MED				(55.97)				55.97	
	12/07/2020	1	ADJUSTMENT		MED				(59.03)					59.03