

Adding Payments and Adjustments

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Version 14.19



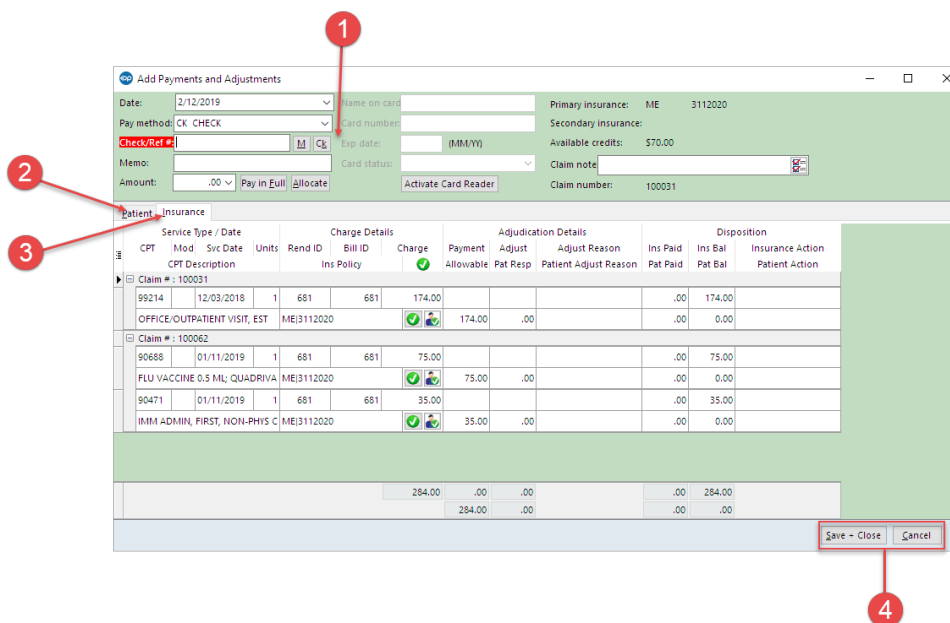
This window map article points out some of the important aspects of the window you're working with in OP but is not intended to be instructional. To learn about topics related to using this window, see the **Related Articles** section at the bottom of this page.

About Adding Payments and Adjustments

Path: Billing, Practice Management or Clinical tab > Patient Chart button > Payments > New Payment button

Path: Billing tab > Bulk Payments button

The Add Payments and Adjustments window posts payments or adjusts amounts on a patient account. Posting a patient payment includes direct payments for balances or applying credits. Payments are separated by the patient or insurance tabs.



The screenshot shows the 'Add Payments and Adjustments' window. Callout 1 points to the 'Date' field (2/12/2019). Callout 2 points to the 'Pay method' dropdown (CK CHECK). Callout 3 points to the 'Patient' tab. Callout 4 points to the 'Save + Close' and 'Cancel' buttons at the bottom right.

Patient		Insurance	
CPT	Mod	Svc Date	Units
99214		12/03/2018	1
OFFICE/OUTPATIENT VISIT, EST			
90688		01/11/2019	1
FLU VACCINE 0.5 ML; QUADRIVA			
90471		01/11/2019	1
IMM ADMIN, FIRST, NON-PHYS C			

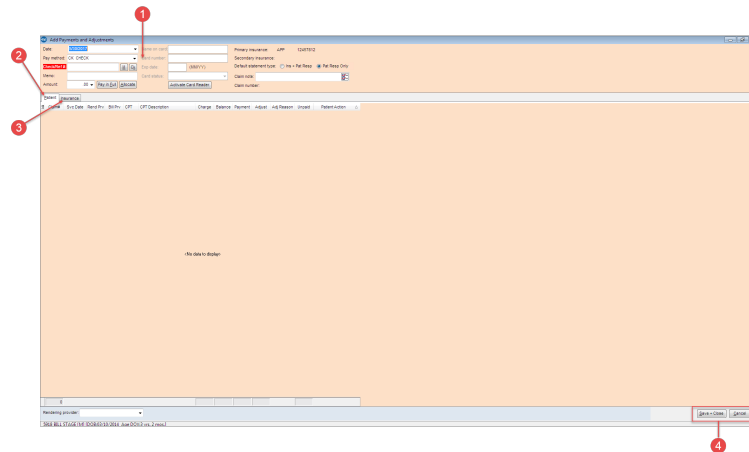
Adding Payments and Adjustments Map

Number	Section	Description
1	Payment	The Payment fields input the payments made by the patient or the insurance. Select the Patient or Insurance tab before inputting the payment information.
2	Patient tab	Lists the payments a patient has made toward Claims on the patient's account.
3	Insurance tab	Lists the payments the insurance has made toward Claims on the selected patient's account.
4	Save + Close and Cancel Buttons	<ul style="list-style-type: none"> Click the Save + Close button to save the new payment information and close the Add Payments and Adjustments window. Click the Cancel button to closes the window without saving changes in the Add

About Add Payments and Adjustments

Path: Smart Toolbar > Account button > Payments tab > + Payment button

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