

## Important Content Update Message


We are currently updating the OP Help Center content for the release of OP 20. OP 20 (official version 20.0.x) is the certified, 2015 Edition, version of the Office Practicum software. This is displayed in your software (**Help tab > About**) and in the Help Center tab labeled Version 20.0. We appreciate your patience as we continue to update all of our content.

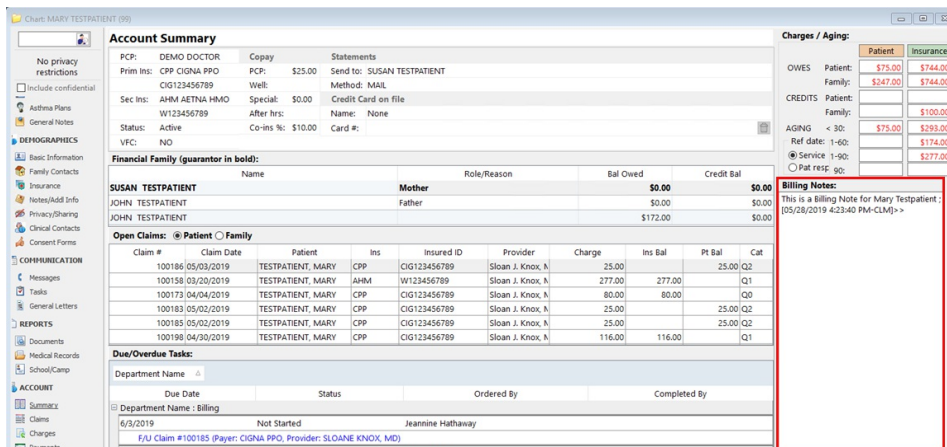
# Write an Account Note

Last Modified on 11/19/2019 1:43 pm EST

Version 14.19

The Billing Notes located in the patient's chart can be used to record substantial billing issues and maintain a chronology of your receivable attempts between the office and the patient and/or an insurance payer.

1. Click the **Patient Chart** button.
2. If needed, use the Search box  to locate the patient.
3. Click **Summary**. The Account Summary is displayed.
4. Locate the box titled Billing Notes.



The screenshot displays the 'Account Summary' window for a patient named MARY TESTPATIENT. The window is divided into several sections:

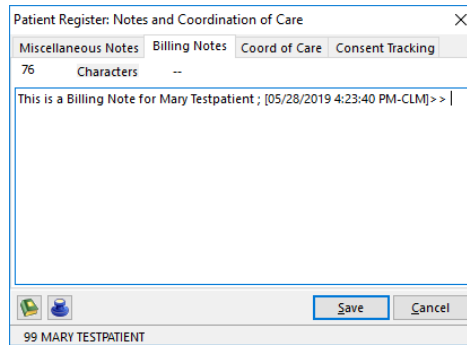
- Account Summary:** Contains patient information such as PCP (DEMO DOCTOR), Prim Ins (CPP CIGNA PPO), Sec Ins (AHM AETNA HMO), Status (Active), and VFC (NO).
- Financial Family (guarantor in bold):** A table listing family members and their financial responsibilities.
 

Name	Role/Reason	Bal Owed	Credit Bal
<b>SUSAN TESTPATIENT</b>	Mother	\$0.00	\$0.00
JOHN TESTPATIENT	Father	\$0.00	\$0.00
JOHN TESTPATIENT		\$172.00	\$0.00
- Open Claims:** A table listing open insurance claims.
 

Claim #	Claim Date	Patient	Ins	Insured ID	Provider	Charge	Ins Bal	Pt Bal	Cat
100186	05/03/2019	TESTPATIENT, MARY	CPP	CIG123456789	Sloan J. Knox, N.	25.00		25.00	Q2
100158	03/20/2019	TESTPATIENT, MARY	AHM	W123456789	Sloan J. Knox, N.	277.00	277.00		Q1
100173	04/04/2019	TESTPATIENT, MARY	CPP	CIG123456789	Sloan J. Knox, N.	80.00	80.00		Q0
100183	05/02/2019	TESTPATIENT, MARY	CPP	CIG123456789	Sloan J. Knox, N.	25.00		25.00	Q2
100185	05/02/2019	TESTPATIENT, MARY	CPP	CIG123456789	Sloan J. Knox, N.	25.00		25.00	Q2
100198	04/30/2019	TESTPATIENT, MARY	CPP	CIG123456789	Sloan J. Knox, N.	116.00	116.00		Q1
- Charges / Aging:** A table showing charges owed by patient and insurance.
 

	Patient	Insurance
OWES Patient:	\$75.00	\$744.00
CREDITS Patient:	\$247.00	\$744.00
AGING < 30:	\$75.00	\$293.00
Ref date: 1-60:		\$174.00
Service 1-90:		\$277.00
Pat resp 90:		
- Billing Notes:** A text area containing a note: "This is a Billing Note for Mary Testpatient : [05/28/2019 4:23:40 PM-CLM]>".


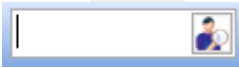
5. Double-click the **Billing Notes** field to open the Patient Register Notes and Coordination of Care. Enter the billing note for the patient.
6. Use the **Timestamp** button to add the date, time, and initials to the note.
7. Click the **Save** button to Exit.



**Note:** Add @@ to the beginning of a note to make the Billing Note box display in red. This makes it stand out to any staff that may be viewing the Account Summary in the patient's chart. It will also make the note a pop-up note when an appointment is being scheduled for the patient.

Version 14.10

The Billing Notes located in the patient's account can be used to record substantial billing issues and maintain a chronology of your receivable attempts between the office and the patient and/or an insurance payer.

1. Click on the **Patient Account** button  .
2. If needed, use the **Search** box  to locate the patient.
3. Click the **Overview** tab of the Patient Account.
4. Locate the box titled **Billing Notes**.

[F12] Patient Account: MARY TEST (99) Sex: F DOB: 07/18/2012 Age: 2 yrs. 1 mos.

Overview Insurance Charges Claims Payments Credits Statements Tasks Messages Consents Disclosures

Scope: Patient (selected), Family

**Demographics / Patient Responsibility:**

PCP: Demo Z. Doctor, MD	Copay	Statements
Prim Ins: AET AETNA	PCP: \$20.00 \$0.00	Send to: SUSAN TEST
145678942	Well:	Method:
Sec Ins: BCBSPA BLUE CROSS	Special: \$40.00 \$0.00	Credit Card on file
123457415	After hrs:	Name: None
Status: Active	Co-ins %: \$0.00 \$0.00	Card #:
VFC: NO		

**Charges / Aging:**

	Patient	Insurance
<b>CHARGES</b>		
Balance owed:	\$155.00	\$125.00
Family owed:	\$155.00	\$125.00
<b>CREDITS</b>		
Patient:		
Family:	\$30.00	
<b>AGING</b>		
Ref date:	< 30:	
	31-60:	
<input checked="" type="radio"/> Service	61-90:	
<input type="radio"/> Pat resp	> 90:	\$155.00 \$125.00

**Financial Family (guarantor in bold):**

Name	Role/Reason	Bal Owed	Credit Bal
<b>SUSAN TEST</b>	<b>Mother</b>	\$0.00	\$0.00
JOHN TEST	Father	\$0.00	\$0.00
ANN TEST			\$30.00
MORTON TESTPATIENT		\$0.00	\$0.00

**Open Claims:**

Claim #	Claim Date	Patient	Ins	Insured ID	Provider	Charge
100014	04/23/2014	TEST, MARY	SP		Demo Doctr	155.00
100060	04/28/2014	TEST, MARY	AET	145678942	Dr. James C	385.00

**Due/Overdue Tasks:**

Department Name /

**Billing Notes:**

- Double-click on the box under **Billing Notes** to open the **Patient Register Notes and Coordination of Care**. Proceed with entering the billing note for that patient.
- Click the **Save** button to Exit.

Patient Register: Notes and Coordination of Care

Miscellaneous Notes Billing Notes (selected) Coord of Care Consent Tracking

72 Characters --

@@@Please collect old balance of 150.00. ; [12/10/2012 3:25:54 PM-SAD]>>

Save Cancel

5030 LLOYD R. TEST

**i** You can add @@ to the beginning of the note. By doing so, the Billing Note box will appear in red to stand out to any staff that may be viewing the patient's account.