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.

Apply Patient Credits

Last Modified on 11/08/2019 1:42 pm EST

Version 14.19

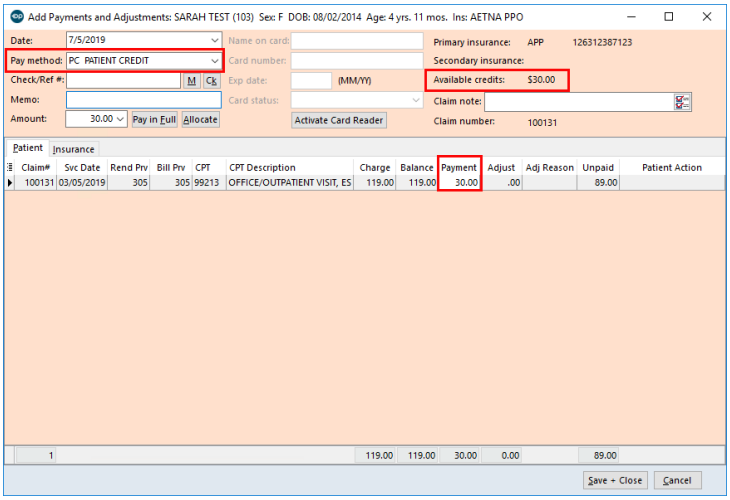
Overview

When patient payments are collected, they are entered into OP as credits.To apply an unallocated patient credit to a balance, you will first want to review the patient's credits:

1. Navigate to the Patient Chart.
2. Review the patient's credits by:
    - Clicking **Credits** in the Window Navigation Panel.
    - Clicking **Summary** in the Window Navigation Panel.

Apply a Credit to a Patient Balance

1. Click **Payments** in the Window Navigation Panel.
2. Click the **New Payment** button.
3. Ensure you are on the **Patient** tab of the **Add Payments/Adjustments** window. The available credit amount is displayed below the insurance payer information.
4. In the **Payment Method** dropdown, ensure **PC Patient Credit** is selected.
5. In the **Payment field**, enter in the credit amount that should be applied to each claim line.

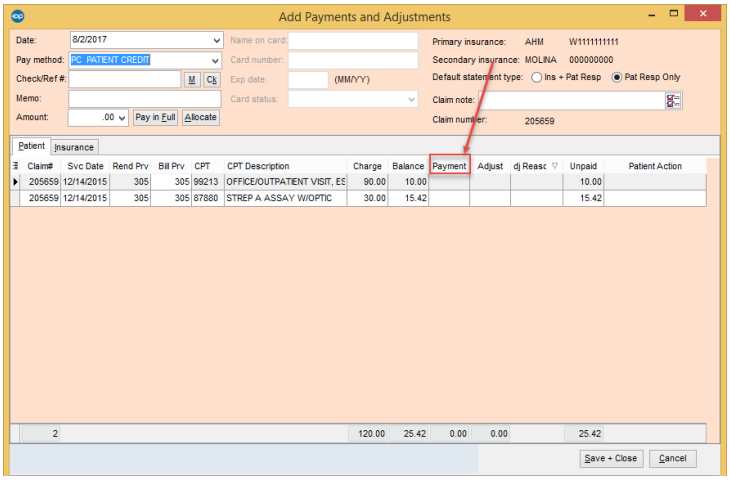


6. Click the **Save + Close** button when complete.

Version 14.10

When there are unallocated credits to be applied to a patient charge, the end user should:

1. Open the **Patient Account**.
2. **Search** for the desired patient in the Patient Search field.
3. **Select** the appropriate patient.
4. Click on the **Credits** tab to view the outstanding credits on that individual's account.
5. Click on **Payments** tab to allocate the unapplied monies to outstanding balances.
6. Click on the **+Payment** button.
7. Ensure you are on the **Patient** tab of the Add Payments/Adjustments window.
8. Select the **Payment Method** to be Patient Credit (**PC**).
9. Enter in the credit amount that you wish to apply for now in the Payment column and to which Date of Service that you wish to allocate the credit.



10. Click the **Save + Close** button when complete.
11. Close all active windows.