

### 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

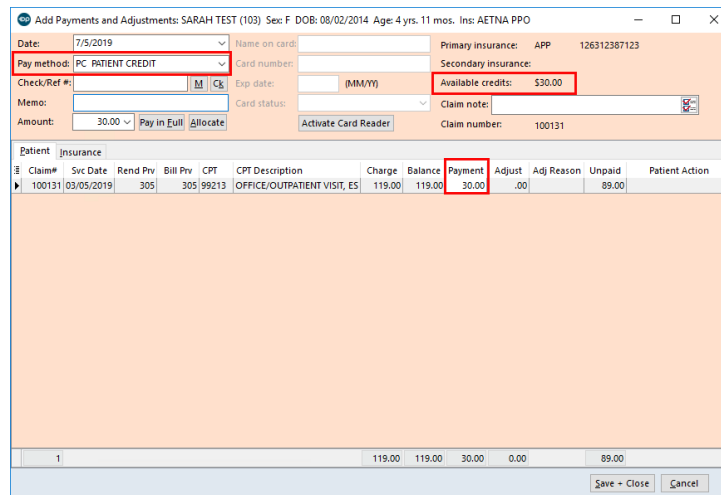
## Overview

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.



**Add Payments and Adjustments: SARAH TEST (103) Sex: F DOB: 08/02/2014 Age: 4 yrs. 11 mos. Ins: AETNA PPO**

Date: 7/5/2019  
 Pay method: PC PATIENT CREDIT  
 Check/Ref #:   
 Memo:   
 Amount: 30.00

Primary insurance: APP 126312387123  
 Secondary insurance:   
 Available credits: 530.00  
 Claim note:   
 Claim number: 100131

Patient	Insurance	Claims#	Svc Date	Rend Piv	Bill Piv	CPT	CPT Description	Charge	Balance	Payment	Adjust	Adj Reason	Unpaid	Patient Action
▶		100131	03/05/2019	305	305	99213	OFFICE/OUTPATIENT VISIT, ES	119.00	119.00	30.00	.00		89.00	

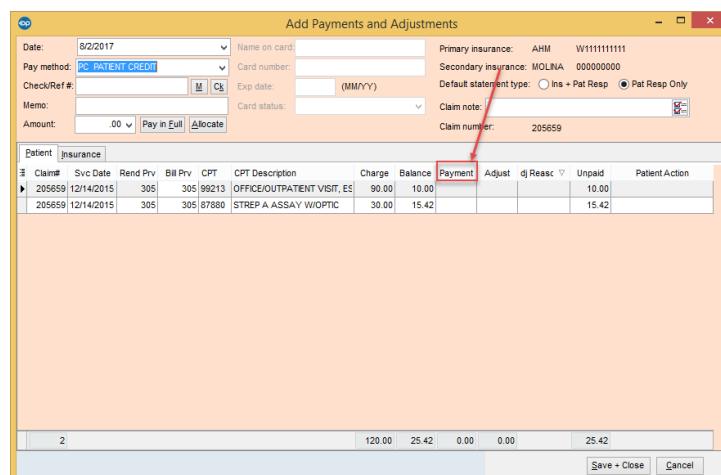
1 119.00 119.00 30.00 0.00 89.00

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.



**Add Payments and Adjustments**

Date: 8/2/2017  
 Pay method: PC PATIENT CREDIT  
 Check/Ref #:   
 Memo:   
 Amount: .00

Primary insurance: AHM W111111111  
 Secondary insurance: MOLNA 000000000  
 Default statement type:  Ins + Pat Resp  Pat Resp Only  
 Claim note:   
 Claim number: 205659

Patient	Insurance	Claims#	Svc Date	Rend Piv	Bill Piv	CPT	CPT Description	Charge	Balance	Payment	Adjust	dj Reasc	Unpaid	Patient Action
▶		205659	12/14/2015	305	305	99213	OFFICE/OUTPATIENT VISIT, ES	90.00	10.00				10.00	
		205659	12/14/2015	305	305	87880	STREP A ASSAY W/OPTIC	30.00	15.42				15.42	

2 120.00 25.42 0.00 0.00 25.42

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

11. Close all active windows.

