

### Important Content Update Message



We are currently updating the OP Help Center content for the release of OP 20. We appreciate your patience as we continue to update all of our content. To locate the version of your software, navigate to: **Help tab > About**

# View a Patient's Credits and Print a Receipt

Last Modified on 04/08/2020 4:17 pm EDT

Version 14.19

## Overview

The Credits section of the patient chart lists patient and insurance credits and debits that have been entered into OP. Current credits, or ones that have not been included on a daysheet, are displayed in blue text. Once the daysheet is processed, they are displayed in black text.

## View a Patient's Credits

1. Navigate to the patient chart.
2. If not already selected, search for and select the patient.
3. Click **Credits** in the Window Navigation Panel.
  - The Credits are generally listed in chronological order, based on when the credit was entered into the system with the most recently entered credit at the top of the list.
  - The Debit columns show when patient and insurance credits were applied.



**Tip:** The columns in the grid can be sorted by clicking the appropriate column header.


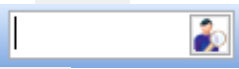
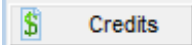

## Print a Receipt

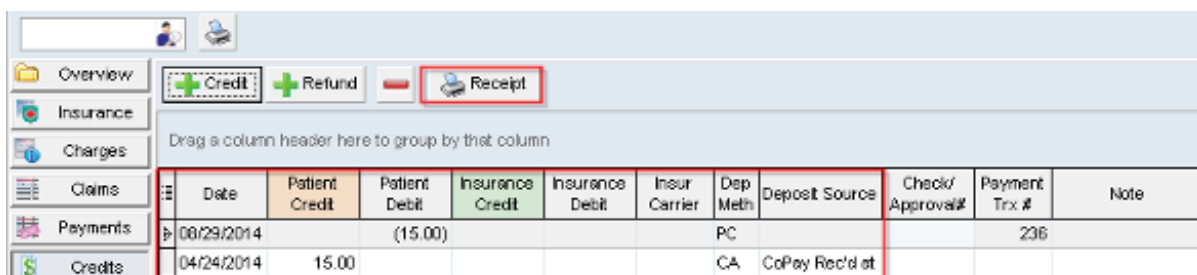
This method of printing a receipt is only applicable to patient payments that have been entered as credits into OP. It is **not** applicable to payments that were posted directly to a balance via the Payment section of the chart.

1. Navigate to the patient chart.
2. If not already selected, search for and select the patient.
3. Click **Credits** in the window navigation panel.
4. Select the credit for which a receipt is needed.

- Click the **Receipt** button to print a receipt for a selected date of service or highlight all or specific dates to print a more inclusive payment history for the patient.

Version 14.10

- Click the **Patient Account** button  .
- If needed, use the search box  to locate the patient.
- Click the **Credits** tab  .
  - The Credits will generally appear in chronological order, based on when the credit was entered into the system. The most recently entered credit will appear at the top of the list. Credits can be grouped together by clicking the Patient Credit column header, as can the Debits by clicking the Patient Debit column header.
- Current credits will appear in blue until a daysheet is processed. Once a daysheet has been processed, the credit will appear in **black** and no longer be current.
- You can see in the Patient Credit column the credit amount collected for that date of service. The Patient Debit column shows when those credits were applied.
- Use the **Receipt** button  to print a receipt for a selected date of service or highlight all or specific dates to print a more inclusive payment history for the patient.



Date	Patient Credit	Patient Debit	Insurance Credit	Insurance Debit	Insur Carrier	Dep Meth	Deposit Source	Check/Approval#	Payment Trx #	Note
08/29/2014		(15.00)				PC			236	
04/24/2014	15.00					CA	CoPay Rec'd at			