

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 Family Account Balance

Last Modified on 04/08/2020 4:16 pm EDT

Version 14.19

Overview

Account balances for patients who have been linked financially are viewed in the**Account Summary** of the patient chart. For more information on the methods for linking families, visit **Linking Families in OP**.

View Family Balances

- 1. Navigate to the patient chart of one of the financially linked patients.
- 2. Click Account Summary in the Window Navigation Panel.
- 3. In the **Owes** section of Charges/Aging, view the family balance. To see the breakdown of balance per patient, locate the **Bal Owed** column in the Financial Family section of the window.

📁 Patient Chart: CALLIE B	. ENGLISH (450	7) Sex: F DOB: 06/16/2008	Age: 11 yrs.	9 mos. Ins	: CIGNA PP	0					
	Account	Summary						Charges /	Aging:		
	PCP:	SLOANE KNOX, MD	Copay		Stateme	nts				Patient	Insurance
No privacy restrictions	Prim Ins:	CPP CIGNA PPO	PCP:	\$0.00	Send to:	KAI	ENGLISH	OWES	Patient:	\$0.00	\$715.00
		CIG012345678	Well:		Method:	MA	IL		Family:	\$177.00	\$1,461.00
	Sec Ins:		Special:	\$0.00	Credit C	ard o	on file	CREDITS	Patient:		\$65.00
ACCOUNT			After hrs:		Name:	Nor	ne		Family:		\$425.00
Summary	Status:	Active	Co-ins %:	\$0.00	Card #:		1	AGING	< 30:		
Insurance	VFC:	NO							31-60:		
Claims	Financial Fa	amily (quarantor in bo	IS678 Well: Method: MAIL Family: S Special: \$0.00 Credit Card on file CREDITS Patient: After hrs: Name: None Family: CREDITS Co-ins %: \$0.00 Card #: Image: Card #: Family: arantor in bold): Role/Reason Bal Owed Credit Bandwidt Alsh Kothor \$0.00 S0.00								
Charges		Name	Role/F	Reason	Bal Owe	ed	Credit Bal		> 90:		\$715.00
Payments	FREDDIE RO	WAN ENGLISH	Mother		\$0	.00	\$0.00	Billing No	tes:		
S Credits	KAI SAGE E	NGLISH	Father		\$0.	.00	\$0.00				^
Statements	ATHENA J E	NGLISH			\$0	.00	\$0.00				
Disclosures	LILY G ENGL	ISH			\$177	.00	\$0.00				
REPORTS 🛠	MADILYNN	M ENGLISH			\$0	.00	\$0.00				

Version 14.10

Overview

Family account balances can be viewed on both the**Patient Directory** window and the **Patient Account** window (of any linked family member). For more information on linking families,





visit Linking Families in OP 14.

View a Family Account Balance from the Patient Directory

- 1. Click on the **Register** button strength to open the **Patient Register**.
- In the Search box
 type in the name of the patient and click the Patient
 Search button 3
- 3. Click on the **Family** tab. This button will show the patients who have the same mother or father or are marked as residing with the selected patient.

215-555-2323 🍇 🗖				-	ryone	Me	e - family O	Search tor: I Se		000	
Pat Cred	Pat Bal	Ins Bal	ins	PCP	DOB	М	First Name	st Name	Las	Patient#	1
\$0.	\$0.00	\$40.00	ACE	SJK Susa	04/26/1999		ASD	ENT	TESTPATE	4358	•
\$160.	\$980.00	\$1,097.0	ALL	SJK Susa	05/16/1994		MARY	ENT	TESTPATE	99	I
	\$980.00	\$1,097.0	ALL	SJK Susa	05/16/1994		MARY	ENT	TESTPATE	99	

View a Family Account Balance from the Patient Account

- 1. Click on the **Account** button .
- 2. View **Family Owed** under **Charges/Aging**. The Family Owed amount includes the balance due from the patient you are viewing.







