

We are currently updating the OP Help Center content for the release of OP 14.19 or OP 19. OP 19 is a member of the certified OP 14 family of products (official version is 14.19.1), which you may see in your software (such as in Help > About) and in the Help Center tabs labeled 14.19. You may also notice that the version number in content and videos may not match the version of your software, and some procedural content may not match the workflow in your software. We appreciate your patience and understanding as we make these enhancements.

Transferring a Full or Partial Balance to a Patient


Last Modified on 09/09/2019 9:40 am EDT

Version 14.19

Overview

When posting an Explanation of Benefits, there may be instances where you need to apply either a full balance or a portion of a balance to patient responsibility. Follow the steps below to transfer balances.

- **Date** - Defaults to the current date of adding in a new payment.
- **payment method** - Method of payment that the payer is sending back to you. Use the drop-down menu to select a different method of payment, such as EFT, Credit Card, etc.
- **Check/Ref#** - Payment identification or reference number that you want to add to balance your payments at the end of the day.
- **M** - Memorizes the check number that is entered.
- **Ck** - Reuses the last memorized check number.
- **Memo** (optional) - Used in offices to identify a specific remark on an EOB (example: patient's responsibility is applied to deductible and co-payment, or Coordination of Benefits update). This Memo Field is displayed on the patient's individual claim in which you are posting payment to. It is not displayed on an correspondence sent to the patient.
- **Amount** - Populates as you add payments into the payment fields.
- To the far right of your screen, there are **insurance details** from the patient's insurance record(s).
- If you are posting a payment and there is a patient responsibility as you are posting, you have the ability to create a statement for the patient after your save your insurance payment. There is the ability to select a **statement type**. You may select a statement to print of any outstanding Insurance and Patient responsibility, or just strictly Patient responsibility only.

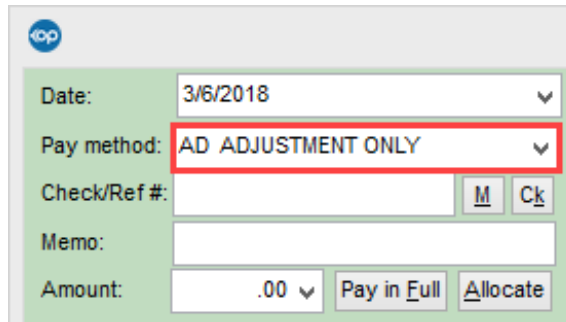
- There is a **note field** to view a claim note on the claim that you are ready to post against.
- If your office would like to create a follow up task for the billing office to follow up on a claim at a later date, click the **Task** button . The Task button can be used to create claim follow up reminders for today or a future date.


Transfer to Patient Balance From the Patient Account

Path: Billing tab > Patient Chart button > Payments

Full Balance to the Patient

1. Click the **Billing** tab and select **Patient Chart**.
2. Search for the Patient in the patient search field.
3. Click **Payments** in the Account section of the Window Navigation Panel.
4. Click the **New Payment** button. The **Add Payments & Adjustments** window is displayed.
5. If the Insurance Payer does not send a check, just a remittance with adjudication details, to bill the patient, input in the Payment Method, **Adjustment Only**.




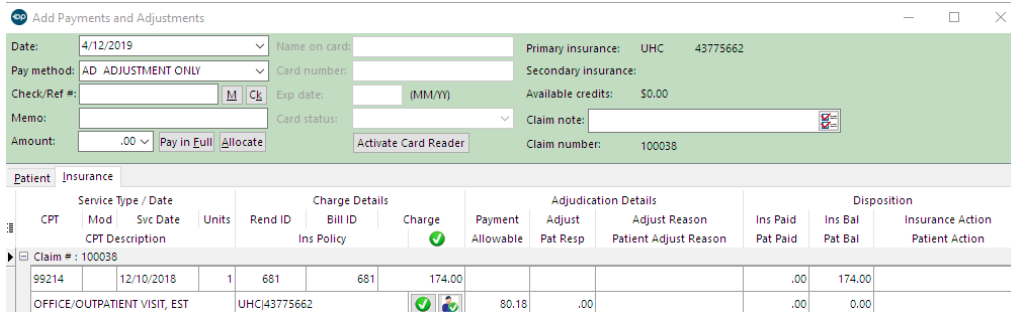
6. If you need to transfer a full balance to the patient, click the **Patient Responsibility** button  on each CPT code line, where applicable.
7. Select a **Patient Adjustment Reason** from the drop-down menu. **Note:** This is printed on the patient's statement.
8. Select a **Patient Action** from the drop-down menu.
9. Click the **Save + Close** button.

Partial Balance Bill to Patient

If there are partial payments or adjustments associated to a patient's claim, and you need to bill part of the allowed amount to the patient, follow these steps:

1. Click the **Billing** tab and select **Patient Chart**.
2. Search for the **Patient** in the patient search field.
3. Click **Payments** in the Account section of the Window Navigation Panel.

4. Click the **New Payment** button. The Add Payments & Adjustments window is displayed.
5. Enter the **Allowed Amount** or click the **Accept Allowed Amount** button  and manually enter in the patient responsibility. If there is no payment associated, delete the payment amount.



CPT	Mod	Svc Date	Units	Rend ID	Bill ID	Charge	Payment Allowable	Adjudication Details		Disposition			
								Adjust Pat Resp	Adjust Reason	Ins Paid Pat Paid	Ins Bal Pat Bal	Insurance Action	Patient Action
99214		12/10/2018	1	681	681	174.00	80.18	.00		.00	174.00		

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

Transfer to Patient Balance From Bulk Payment Center

Path: Billing tab > Bulk Payments button

The above steps are followed in the Post Bulk Payments window. After all of the adjudication details have been entered, click the **Save + New** button to continue to a new patient or click the **Save + Close** button to close the window.


Version 14.10

Overview

When posting an Explanation of Benefits, there may be instances where you need to apply either a full balance or a portion of a balance to patient responsibility. Follow the steps below to transfer balances.

- **Date** - Defaults to the current date of adding in a new payment.
- **Pay Method** - Method of payment that the payer is sending back to you. Use the drop-down menu to select a different method of payment, such as EFT, Credit Card, etc.
- **Check/Ref#** - Payment identification or reference number that you want to add to balance your payments at the end of the day.
- **M** - Memorizes the check number that is entered.
- **Ck** - Reuses the last memorized check number.
- **Memo** (optional) - Used in offices to identify a specific remark on an EOB (example: patient's responsibility is applied to deductible and co-payment, or Coordination of Benefits update). The Memo Field is displayed on the patient's individual claim in which

you are posting payment to. It is not displayed on an correspondence sent to the patient.

- **Amount** - Populates as you add payments into the payment fields.
- To the far right of your screen, there are **insurance details** from the patient's insurance record(s).
- If you are posting a payment and there is a patient responsibility as you are posting, you have the ability to create a statement for the patient after your save your insurance payment. There is the ability to select a statement type. You may select a statement to print of any outstanding *Insurance and Patient responsibility*, or just strictly *Patient responsibility only*.
- Note - Use to view a claim note on the claim that you are ready to post against.
- If your office would like to create a follow up task for the billing office to follow up on a claim at a later date, click on the **Task** button . The Task button can be used to create claim follow up reminders for today or a future date.

Transferring to Patient Balance From the Patient Account

Full Balance to the Patient

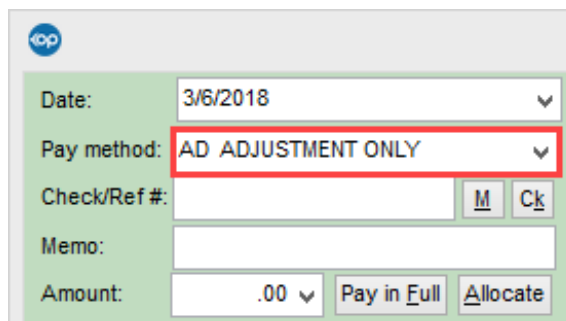
1. On the OP toolbar, click the **Patient Account** button.




Keyboard Shortcut

The F12 key on your keyboard can also be used to access the Patient's Account

2. Search for the **Patient** in the search box.
3. Click the **Payment** tab.
4. Click the **Plus Payment** button. The Add Payments & Adjustments window is displayed.
5. If the Insurance Payer does not send a check, just a remittance with adjudication details, to bill the patient, select **Adjustment Only** from the Pay method drop-down menu.




6. To transfer a full balance to the patient, click  on each CPT code line, where applicable.
7. Select a **Patient Adjustment** reason from the drop-down menu. Note: This will print on the patient's statement.
8. Select a **Patient Action** from the drop-down menu.
9. Click the **Save + Close** button.

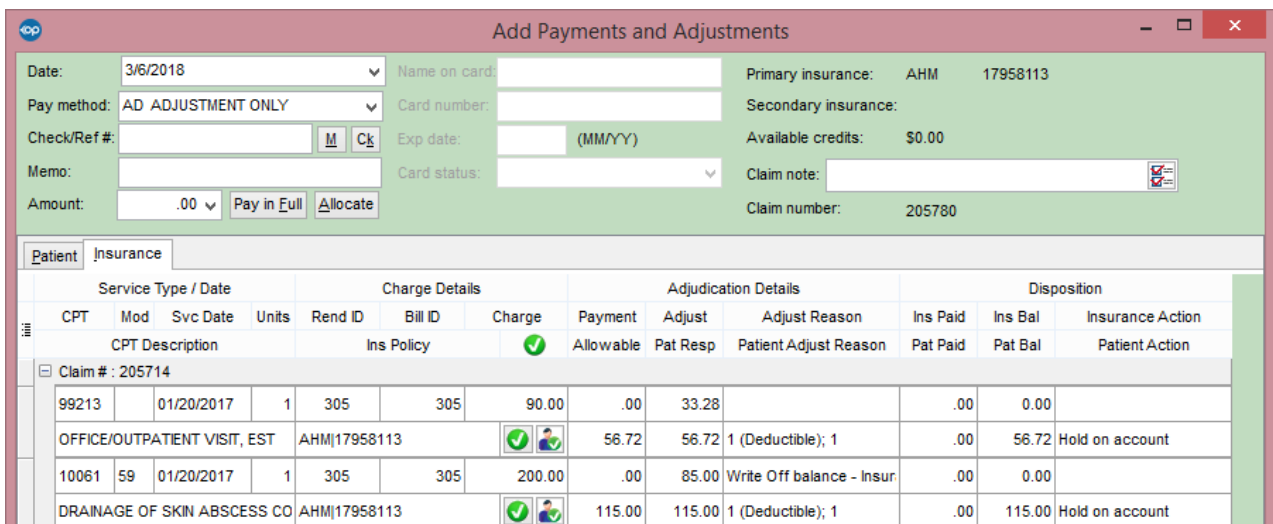
Partial Balance Bill to Patient

If there are partial payments or adjustments associated to a patient's claim, and you need to bill part of the allowed amount to the patient, see below.

1. On the OP toolbar, click the **Patient Account** button.

 **Keyboard Shortcut**
Use the F12 key on your keyboard to access the Patient's Account

2. Search for the **Patient** in the search box.
3. Click **Payment** button.
4. Click the **Plus Payment** button. The Add Payments & Adjustments window is displayed.
5. Enter the **Amount** or click the **green** checkmark to accept your allowed amount, and manually enter in the patient responsibility. If there is no payment associated, delete the payment amount.



Add Payments and Adjustments

Date: 3/6/2018 | Name on card: | Primary insurance: AHM 17958113
 Pay method: AD ADJUSTMENT ONLY | Card number: | Secondary insurance:
 Check/Ref #: | M | Ck | Exp date: (MM/YY) | Available credits: \$0.00
 Memo: | Card status: | Claim note:
 Amount: .00 | Pay in Full | Allocate | Claim number: 205780

Patient		Insurance		Charge Details			Adjudication Details			Disposition		
CPT	Mod	Svc Date	Units	Revd ID	Bill ID	Charge	Payment	Adjust	Adjust Reason	Ins Paid	Ins Bal	Insurance Action
CPT Description				Ins Policy			Allowable	Pat Resp	Patient Adjust Reason	Pat Paid	Pat Bal	Patient Action
Claim # : 205714												
99213		01/20/2017	1	305	305	90.00	.00	33.28		.00	0.00	
OFFICE/OUTPATIENT VISIT, EST				AHM 17958113		<input checked="" type="checkbox"/>	56.72	56.72	1 (Deductible); 1	.00	56.72	Hold on account
10061	59	01/20/2017	1	305	305	200.00	.00	85.00	Write Off balance - Insur	.00	0.00	
DRAINAGE OF SKIN ABSCESS CO				AHM 17958113		<input checked="" type="checkbox"/>	115.00	115.00	1 (Deductible); 1	.00	115.00	Hold on account

6. After all of the adjudication details have been entered, click the **Save + Close** button.

Transferring to Patient Balance From Bulk Payment Center

Path: Activities Menu > Post Bulk Payments (Keyboard Shortcut keys: Shift + F12)

The above steps can also be taken in the Post Bulk Payments window. After all of the adjudication details have been entered, click the **Save + New** button to continue to a new patient or click the **Save + Close** button to close the window.

