

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.

Transfer Credits Between Siblings

Last Modified on 03/04/2020 9:35 am EST

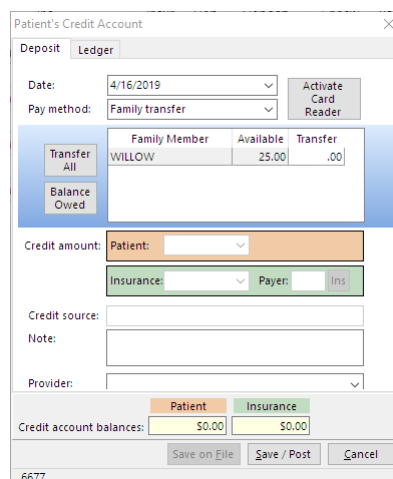
Version 14.19

Overview

Family credits can easily be transferred among siblings that are financially linked using the transfer method of Family Transfer. Financially linked patients are those that share the same Patient Responsibility Guarantor as indicated in the Insurance section of the patient chart.

Transfer Credits

1. Navigate to the Patient Chart of the Patient that has the balance and needs a credit from a sibling.
2. Click **Credits**.
3. Click the **New Credit** button. The Patient's Credit Account window is displayed.
4. Select **Family transfer** from the Pay Method drop-down menu. The Family Transfer grid displays listing the available credits in all of the patient's siblings' accounts.
5. Enter the **Amount** of the credit being transferred from the sibling(s) in the **Transfer** field or click the **Transfer All** or **Balance Owed** button, as appropriate.



The screenshot shows the 'Patient's Credit Account' window with the 'Ledger' tab selected. The 'Date' is 4/16/2019 and the 'Pay method' is 'Family transfer'. The 'Family Transfer' grid shows a transfer from 'WILLOW' with an available amount of 25.00 and a transfer amount of .00. The 'Credit amount' section has 'Patient' selected. The 'Credit account balances' table shows Patient and Insurance both at 50.00.

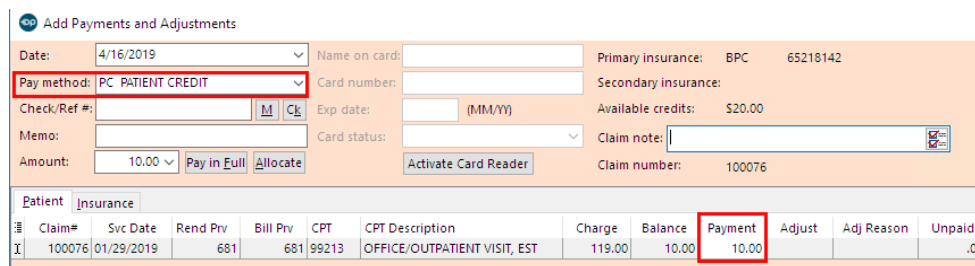
Family Member	Available	Transfer
WILLOW	25.00	.00

	Patient	Insurance
Credit account balances:	50.00	50.00

6. Click the **Save / Post** button to save and close the window. Both the patient and sibling credit accounts will be credited/debited accordingly.

Apply the Credit to the Patient Balance

1. Click **Payments**.
2. Click the **New Payment** button. The Add Payments and Adjustments window is displayed.
3. If it is not already selected, click the **Patient** tab.
4. Select **Patient Credit** from the Pay Method drop-down menu.
5. Enter the **Amount** in the Payment field.



Add Payments and Adjustments

Date: 4/16/2019 Name on card: Primary insurance: BPC 65218142
 Pay method: PC PATIENT CREDIT Card number: Secondary insurance:
 Check/Ref #: Exp date: (MM/YY) Available credits: \$20.00
 Memo: Card status: Claim note:
 Amount: 10.00 Pay in Full Allocate Activate Card Reader Claim number: 100076

Patient		Insurance									
Claim#	Svc Date	Rend Prv	Bill Prv	CPT	CPT Description	Charge	Balance	Payment	Adjust	Adj Reason	Unpaid
100076	01/29/2019	681	681	99213	OFFICE/OUTPATIENT VISIT, EST	119.00	10.00	10.00			.00

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

Version 14.10

Overview

In Office Practicum, you have the ability to transfer family credits among members of the same family.

Note: Family members are financially linked together by the same Patient Responsibility Guarantor from the patient's insurance record. To learn how to financially link family members, click [here](#).


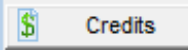
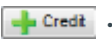
If one sibling has a credit and another sibling has an account balance, you can manually transfer the credit from the first patient to the second, by following one of the procedures below:

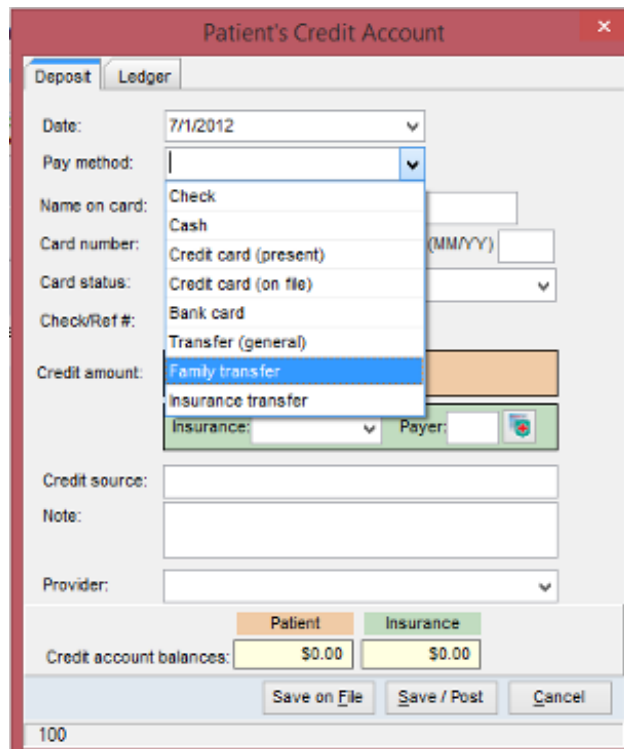
The **Family Transfer** pay method allows you to transfer credits between siblings quickly and easily, without requiring that you enter the credit refund transaction in each individual account. The **Family Transfer** grid displays available credits in all of the patient's siblings' accounts, and you can enter the amount you would like to transfer (or click **Transfer All**) from one or several of these accounts.

Transfer Credits

1. From the **Smart Toolbar**, click the **Acct** button.



2. Enter a **Patient Name** in the Patient Search field that has a balance and is in need of a sibling credit transfer .
3. Click the **Credits** button , located on the left side of the screen.
4. Click the **Add Credit** button .
5. Select **Family transfer** from the Pay method drop-down menu.

A screenshot of a software window titled "Patient's Credit Account". The window has two tabs: "Deposit" and "Ledger", with "Ledger" selected. The form contains several fields: "Date" (7/1/2012), "Pay method" (a dropdown menu with "Family transfer" selected), "Name on card", "Card number", "Card status" (Credit card (on file)), "Check/Ref #", "Credit amount" (a text input field), "Insurance" (a dropdown menu), "Payer" (a dropdown menu), "Credit source", "Note", and "Provider" (a dropdown menu). At the bottom, there are two buttons: "Patient" and "Insurance", and a table showing "Credit account balances" for both as "\$0.00". There are also "Save on File", "Save / Post", and "Cancel" buttons.

6. Enter the **Amount** of the credit being transferred from the sibling in the **Transfer** field or click on the **Transfer All** button or **Balance Owed**, as appropriate.

Note: This feature allows you to transfer credits from multiple siblings in one step.

Patient's Credit Account

Deposit Ledger

Date: 7/1/2012

Pay method: Family transfer

Family Member	Available	Transfer
ALLISTER	100.00	.00
MARY	10.00	.00

Transfer All

Balance Owed

Credit amount: Patient: [dropdown]

Insurance: [dropdown] Payer: [dropdown]

Credit source:

Note:

Provider: [dropdown]

Credit account balances: Patient \$0.00 Insurance \$0.00

Save on File Save / Post Cancel

100

7. Click the **Save / Post** button to save and close the window. Both the patient and sibling accounts are credited/debited accordingly.

Patient's Credit Account

Deposit Ledger

Date: 7/1/2012

Pay method: Family transfer

Family Member	Available	Transfer
ALLISTER	100.00	20.00
MARY	10.00	5.00

Transfer All

Balance Owed

Credit amount: Patient: 25.00

Insurance: [dropdown] Payer: [dropdown]

Credit source: ALLISTER (20.00), MARY (5.00)

Note:



Provider: [dropdown]

Credit account balances: Patient \$0.00 Insurance \$0.00

Save on File Save / Post Cancel

100

8. To apply this credit to the patient account balance:

- a. Click the **Payments** button  Payments .
- b. Click the **Add Payment** button  Payment .

c. Select **Patient Credit** from the Pay method drop-down menu.

Add Payments and Adjustments

Date: 12/20/2013 Name on card: _____ Primary insurance: AET W12345678900

Pay method: PC PATIENT CREDIT Card number: _____ Secondary insurance: MED 1213243434

Check/Ref #: _____ Exp date: _____ (MM/YY) Default statement type: Ins + Pat Resp Pat Resp Only

Memo: _____ Card status: _____ Claim note: _____

Amount: 25.00

Patient		Insurance										
Claim#	Svc Date	Rend Prv	Bill Prv	CPT	CPT Description	Charge	Balance	Payment	Adjust	Adj Reason	Unpaid	Patient Action
100055	07/18/2013	107	107	81001	URNALYSIS, AUTO W/SCOPE	25.00	25.00	25.00			.00	