

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.

Adjusting a Patient or an Insurance Balance

Last Modified on 12/30/2019 2:37 pm EST

Version 14.19

Path: Billing tab > Patient Chart button > Payments

Overview

Learn how to adjust a patient or insurance balance by following these steps:

Adjusting Balances

1. Click the **Billing** tab.
2. Click the **Patient Chart** button.
3. Search for and select the **Patient**.
4. Click **Payments**.
5. Click the **New Payment** button. The Add Payments & Adjustments window is displayed.

All unpaid transactions display in the bottom panel. The Insurance tab is selected if there is an insurance balance.

Note: Confirm that you are on the correct tab of the add payments and adjustments screen.



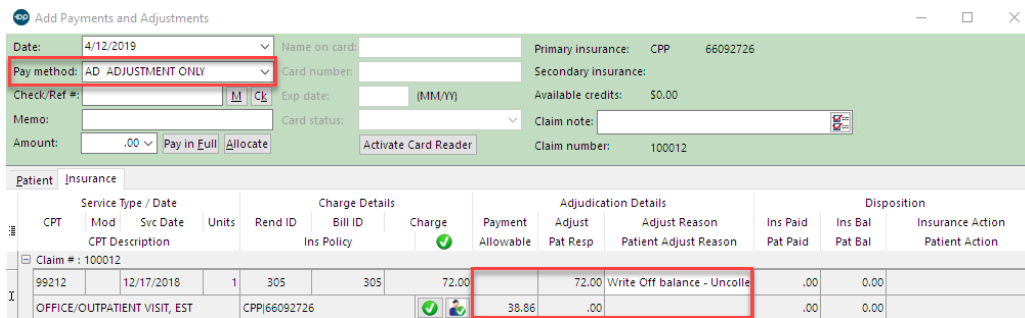
Balances are displayed in separate Patient Balance (Orange Background) and Insurance Balance (Green Background) tabs, each with distinctly colored background displays.

Entering an Insurance Adjustment

1. Confirm you are on the **Insurance** tab.
2. Select **AD Adjustment Only** from the Pay Method drop-down menu.
3. Click the **Memo** field (optional) and enter Additional **Information** such as the adjustment

reason or date of EOB payment.

- If you are receiving a non-payment check and the EOB states to adjust a balance, enter the **Insurance Adjustment** amount in the Adjust field under Adjudication Details.



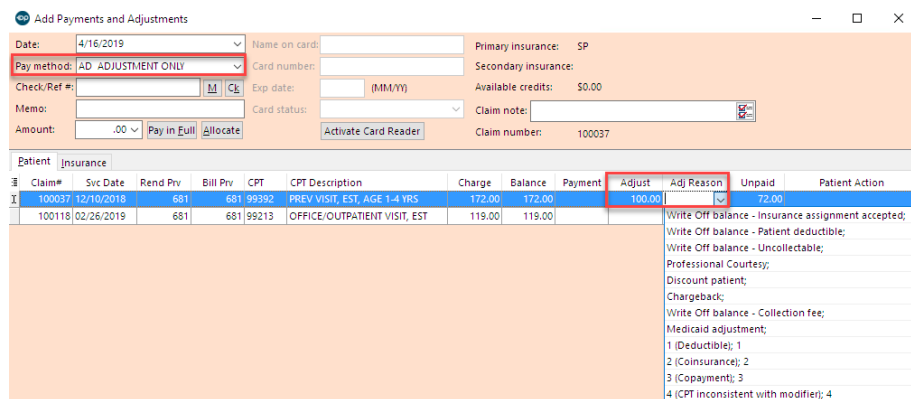
The screenshot shows the 'Add Payments and Adjustments' window. The 'Pay method' is set to 'AD ADJUSTMENT ONLY'. The table below shows a row for claim 100012 with a charge of 72.00 and an adjustment of 72.00. The 'Adjust Reason' is 'Write Off balance - Uncolle'.

CPT	Mod	Svc Date	Units	Rend ID	Bill ID	Charge	Payment Allowable	Adjudication Details		Ins Paid Pat Paid	Ins Bal Pat Bal	Insurance Action Patient Action
								Adjust	Adjust Reason			
99212		12/17/2018	1	305	305	72.00		72.00	Write Off balance - Uncolle	.00	0.00	
OFFICE/OUTPATIENT VISIT, EST CPPI66092726												

- Select an **Adjust Reason** from the drop-down menu.
- Click the **Save + Close** button.

Entering a Patient Adjustment

- Confirm you are on the **Patient** tab.
- Select **AD Adjustment Only** from the Pay Method drop-down menu.
- Click the Memo (optional) field and enter **Additional Information**.
- Enter the **Amount** to adjust in the Adjust column.
- Select an **Adjust Reason** from the drop-down menu.
- Click the **Save + Close** button.



The screenshot shows the 'Add Payments and Adjustments' window. The 'Pay method' is set to 'AD ADJUSTMENT ONLY'. The table below shows a row for claim 100037 with a charge of 172.00 and an adjustment of 172.00. The 'Adjust Reason' dropdown menu is open, showing options like 'Write Off balance - Insurance assignment accepted', 'Write Off balance - Patient deductible', 'Write Off balance - Uncollectable', 'Professional Courtesy', 'Discount patient', 'Chargeback', 'Write Off balance - Collection fee', 'Medicaid adjustment', '1 (Deductible); 1', '2 (Coinsurance); 2', '3 (Copayment); 3', and '4 (CPT inconsistent with modifier); 4'.




Claim#	Svc Date	Rend Ptv	Bill Ptv	CPT	CPT Description	Charge	Balance	Payment	Adjust	Adj Reason	Unpaid	Patient Action
100037	12/10/2018	681	681	99392	PRV VISIT, EST, AGE 1-4 YRS	172.00	172.00		172.00		72.00	
100118	02/26/2019	681	681	99213	OFFICE/OUTPATIENT VISIT, EST	119.00	119.00					

Version 14.10

Overview

Learn how to adjust a patient or insurance balance by following these steps:

Adjusting Balances

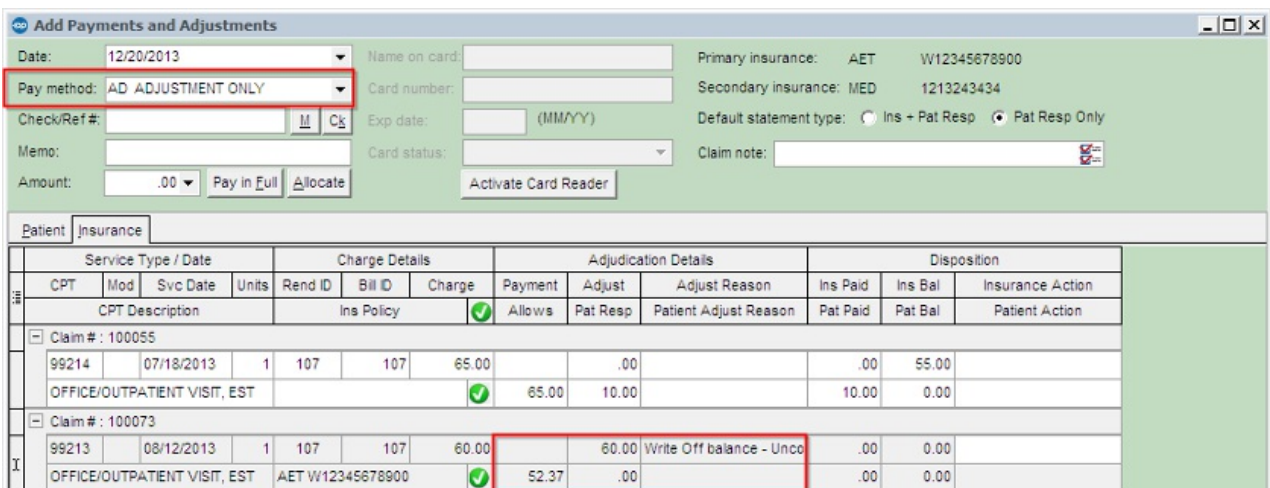
1. Open up your **Patient's Account**  in which you wish to adjust a balance.
2. Click the **Payments** tab  .
3. To add an adjustment click the **Add Payment** button  . The Add Payments and Adjustments screen is displayed.

Ensure that you are on the correct tab of the add payments and adjustments screen. Balances are displayed in separate Patient Balance (Orange Background) and Insurance Balance (Green Background) tabs, each with distinctly colored background displays.

All unpaid transactions are displayed in the lower portion of the form. By default, the form opens to the Insurance Balance tab, if there is an insurance balance.

To Enter an Insurance Adjustment

1. Enter the following information in the fields:
 - a. Select **AD Adjustment Only** from the Pay Method drop-down menu.
 - b. **Memo** - This is an optional field for recording more specific information, such as the adjustment reason, or date of EOB payment.
2. If you are receiving a non-payment check, and the EOB states to adjust a balance, enter in the **Insurance Adjustment** under the adjudication detail field.



CPT	Mod	Svc Date	Units	Rend ID	Bill ID	Charge	Adjudication Details		Disposition			
							Payment	Adjust	Adjust Reason	Ins Paid	Ins Bal	Insurance Action
Claim #: 100055												
99214		07/18/2013	1	107	107	65.00		.00		.00	55.00	
OFFICE/OUTPATIENT VISIT, EST							65.00	10.00		10.00	0.00	
Claim #: 100073												
99213		08/12/2013	1	107	107	60.00		60.00	Write Off balance - Unco	.00	0.00	
OFFICE/OUTPATIENT VISIT, EST							52.37	.00		.00	0.00	

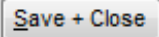
3. If you have identified an amount to be adjusted, select an **Adjustment Reason** from the drop-down menu.
4. Click the **Save + Close** button.

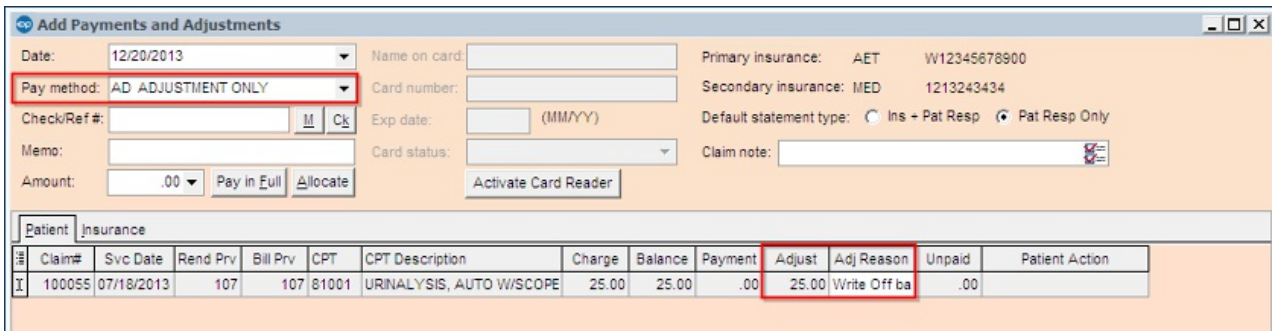
Entering a Patient Adjustment

1. Open up your **Patient's Account** in which you wish to adjust a balance.

2. Click **Payments**.
3. To add an adjustment click **Add Payment**. The Add Payments and Adjustments screen is displayed.

Ensure that you are on the correct tab of the Add Payments and Adjustments screen. Balances are displayed in separate Patient Balance (Orange Background) and Insurance Balance (Green Background) tabs, each with distinctly colored background displays.

4. Select **AD Adjustment Only from the Pay Method drop-down menu.**
5. **Memo** - This is an optional field for recording more specific information, such as the adjustment reason.
6. Enter in the **Amount** in the Adjustment column that you wish to adjust off from the patient responsibility.
7. If you have identified an amount to be adjusted, select an **Adjustment Reason** from the drop-down menu.
8. Click the **Save and Close**  button in the lower right side of your screen.



Add Payments and Adjustments

Date: 12/20/2013 | Name on card: | Primary insurance: AET W12345678900
 Pay method: **AD ADJUSTMENT ONLY** | Card number: | Secondary insurance: MED 1213243434
 Check/Ref #: | Exp date: (MMYY) | Default statement type: Ins + Pat Resp Pat Resp Only
 Memo: | Card status: | Claim note:
 Amount: .00 | Pay in Full | Allocate | Activate Card Reader

Patient		Insurance											
#	Claim#	Svc Date	Rend Prv	Bill Prv	CPT	CPT Description	Charge	Balance	Payment	Adjust	Adj Reason	Unpaid	Patient Action
I	100055	07/18/2013	107	107	81001	URINALYSIS, AUTO WSCOPE	25.00	25.00	.00	25.00	Write Off ba	.00	