> **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.

# Entering an Overpayment

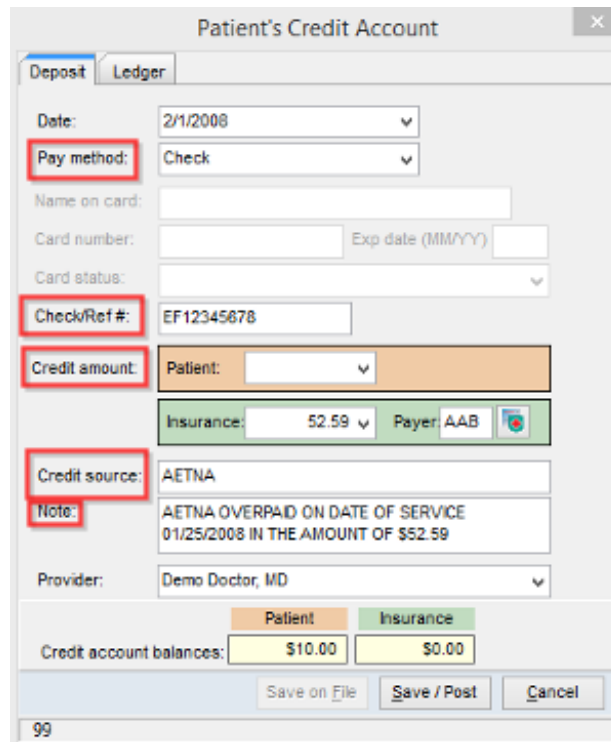Last Modified on 11/20/2019 2:44 pm EST

Version 14.19

> **Path: Clinical, Billing, or Practice Management tab > Patient Chart button**

## Overview

If an insurance payment was made to your office in error as a duplicate payment, you will notice that once a claim is settled there is not a way to post an additional payment on the claim. You will need to add an insurance credit onto the Patient Chart.

## Recording an Over-payment

1. Navigate to the **Patient Chart** using the path above.
2. Click **Credits** in the Account section of the Window Navigation Panel.
3. Click the **New Credit** button. The Patient's Credit Account window is displayed. The Date field defaults to the current date.
4. Select the **Pay method** in which the over-payment was received from the drop-down menu.
5. Enter the **Check Number** in the Check/Ref # field, if appropriate.
6. Enter the **Amount** of the over-payment in the Patient Credit or Insurance Credit field, as appropriate.

   - For Insurance credits ONLY, click the **Lookup** button next to the Insurance Payer Code field and select a **Payer**.

7. Enter the credit details/explanation in the **Note** field (e.g., "Duplicate payment for date of service, xx/xx/xx"). Include as many details as possible, including any information about an error or retraction, if applicable.

8. Once finished, click the **Save/Post** button at the bottom of the window to save changes and exit.

> 📌 **Note**: When a payer identifies an insurance over-payment, the payer requests a refund or the over-payment is applied to another patient account.
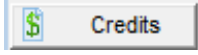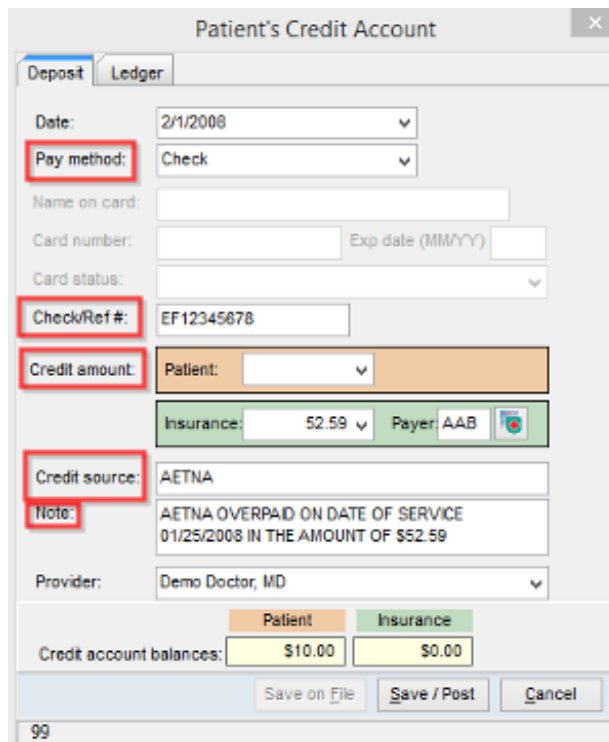
Version 14.10

## Path: Smart Toolbar > Account button

# Overview

If an insurance payment was made to your office in error as a duplicate payment a user will notice that once a claim is settled there is not a way to post an additional payment on the claim. Users will need to add an insurance credit onto the Patient Account.

1. Enter the **Payment** as an insurance credit in the Patient's Account.
2. In the Note field of the Patient's Credit Account form, enter as much**detail** as possible to explain why the Payment was made in error.
3. When finished, click the **Save** button to save and close.

# Recording an Overpayment

1. Click the **Patient Account** Accnt button.
2. Click the **Credits** $ Credits button.
3. Click the **Add Credit** Credit button.
4. Select the appropriate **method of payment** from the Pay method drop-down menu.
5. Enter the check number in the **Check/Ref #** field, if appropriate.
6. Enter the amount of the over-payment in the **Patient Credit** or **Insurance Credit** field, as appropriate.

   - For Insurance credits ONLY, click the **Lookup** button next to the Insurance Payer Code field and select a **Payer**.

7. Enter the **credit details/explanation** in the **Note** field (e.g., "Duplicate payment for date of service, xx/xx/xx"). Include as many details as possible, including any information about an error or retraction, if applicable.



8. Once finished, click the **Save/Post** Save / Post button at the bottom of the window to save changes and exit.

⚠ **Note**: When a payer identifies an insurance over-payment, the payer requests a refund or the over-payment is applied to another patient account. Also, when you are balancing out your current payments for the day, ook under Current Credits, when you are adding in insurance credits to patient's accounts.