

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.

Balancing an EOB that has been Posted

Last Modified on 11/20/2019 2:47 pm EST

Version 14.19

Path: Billing tab > Billing Center button

Overview

Once you have completed posting remits, you want to ensure that the amount that was posted into OP balances to the EOB. This balancing is done in the **Receipts** tab of the **Billing Center**. The **Receipts** tab displays all current (non-daysheeted) receipts.

Balancing an EOB

1. Navigate to the Billing Center using the path above.
2. Click the **Receipts** tab. The columns in this grid can be sorted, grouped, and filtered to easily display the needed information. This can also be saved as a preference. In the image below, the grid is grouped by **Payment Method** and **Check #** so that we can easily see the check postings displayed.



Note: If you do not see columns specific to your needs, click the **Show/Hide columns** button



to the left of the columns to add more options.

Date	Patient Name	Insurance Payment	Patient Payment	Total Payments	Deposit Source
Payment Method : CA					
		0.00	35.00	35.00	
Payment Method : CK					
Check # : 1001					
06/28/2019	TESTPATIENT, MARY	151.00		151.00	
06/28/2019	TESTPATIENT, MARY	66.00		66.00	
		217.00	0.00	217.00	

Version 14.10

Path: Smart Toolbar > Billing button

Overview

Once a user has completed posting their paper remittance, you will want to ensure that the amount that was posted into Office Practicum balances to what was sent to you on the EOB.

Balancing an EOB

1. Open the **Billing Center** on the Smart Toolbar.






2. Click on **Current Receipts**  **Current Receipts** tab.

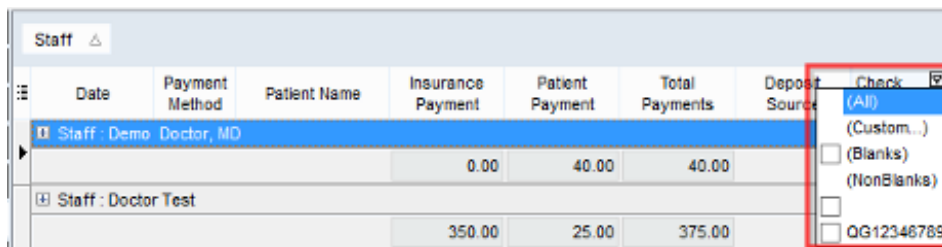
3. The columns are *sortable* and *filterable*. If a user wishes to sort columns by staff member:
 - a. Left click on the **Staff Column**.
 - b. **Hold** the column with your mouse.
 - c. **Drag** the column to the header to sort by staff members who have entered in payments for the day.

Date	Payment Method	Patient Name	Insurance Payment	Patient Payment	Total Payments	Deposit Source	Check #	Staff	Note	Prov	Location
08/15/2014	CC	TESTPATIENT, JOHI		25.00	25.00			Demo Doct			Primary Loc
08/15/2014	CA	TESTPATENT, MAR		15.00	15.00			Demo Doct			Primary Loc
08/15/2014	CK	TESTPATENT, JOHI	200.00		200.00		QG1234678	Doctor Test			Primary Loc
08/15/2014	CA	TESTPATENT, JOHI		15.00	15.00			Doctor Test			Primary Loc
08/15/2014	CA	TESTPATENT, MAR		10.00	10.00			Doctor Test			Primary Loc
08/15/2014	CK	TESTPATENT, MAR	150.00		150.00		QG1234678	Doctor Test			Primary Loc

(Optional) If a user would like to filter by more specific information such as the check that was just posted:

- a. **Hover** over the Check# column until you see a filter icon  , click on it.
- b. Office Practicum will allow you to **check off** the specific information that you wish to filter out.

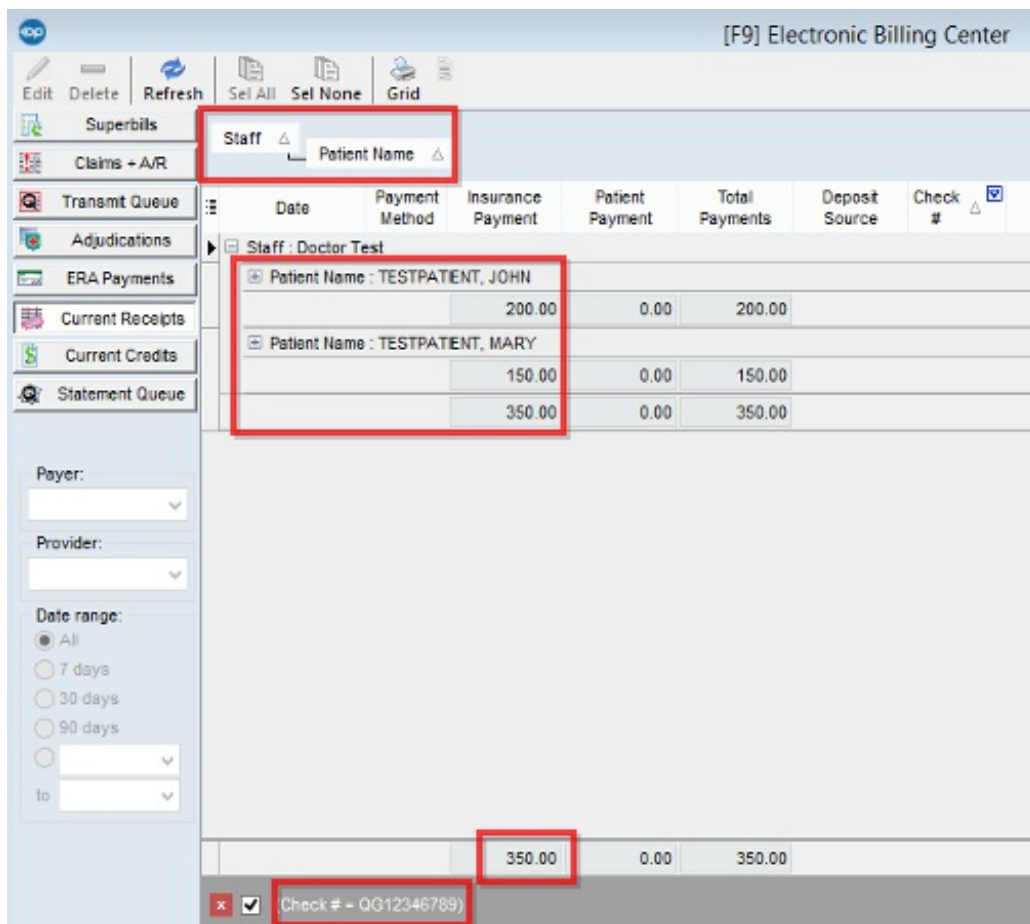
 **Note:** If you do not see columns specific to your needs click on the **3-dotted ellipsis**  to the left of the columns to add in more options.



Date	Payment Method	Patient Name	Insurance Payment	Patient Payment	Total Payments	Deposit Source	Check
Staff: Demo Doctor, MD							
			0.00	40.00	40.00		
Staff: Doctor Test							
			350.00	25.00	375.00		

The dropdown menu for the Check column is open, showing options: (All), (Custom...), (Blanks), (NonBlanks), and QG12346789.

4. A user can now see the check posted under their individual name with all patient detail attached.



[F9] Electronic Billing Center

Staff: Patient Name

Date	Payment Method	Insurance Payment	Patient Payment	Total Payments	Deposit Source	Check #
Staff: Doctor Test						
Patient Name : TESTPATIENT, JOHN						
		200.00	0.00	200.00		
Patient Name : TESTPATIENT, MARY						
		150.00	0.00	150.00		
		350.00	0.00	350.00		
		350.00	0.00	350.00		

Check # = QG12346789

