

Manually Add a Credit for an Overpayment

Last Modified on 05/23/2019 2:20 pm EDT

Version 14.19

Path: Smart Toolbar > Account button > Credits tab

Overview

Overpayments can be received by a patient and/or an insurance payer via an EOB or an ERA. When a payer identifies an insurance overpayment, the payer will ultimately either request a refund or apply the overpayment to another patient account.

1. From the patient account, click on the **Credits** tab.

9	File Activ	itie	s Reports	Utilities L	og In/Out	Tools Wi	ndow He	lp		Ded 🗸				_ 8 ×
Sc	hed Rack	Rg	str Insur A	dr Bk Tasks	s Chart	Chron For	ns Super	Accent	Billing	Docs 0-0-12	2-0 Send) R M e-Rx	Printer Stamp	Pref Chat
		2												
0	Overview		- Credit	Refund	- 8	Receipt								
۲	Insurance													
-	Charges	Drag a column header here to group by that column												
₩.	Claims		Date	Patient Credit	Patient Debit	Insurance Credit	Insurance Debit	Insur Carrier	Dep Meth	Deposit Source	Check/ Approva#	Payment Trx #	Note	Entered by
蒜	Payments	>	08/27/2014				(70.25)		RT	Pt 104		0	Insurance Retracted	Doctor Test
\$	Credits	L	08/27/2014			15.25		AAB	PC	RECOUP	0000000	112	RECOUP payment tr	Doctor Test
3	Statements	1	08/27/2014			55.00		AAB	PC	RECOUP	0000000	107	RECOUP payment tr	Doctor Test
8-	Tasks	i –	03/29/2014		(20.00)				PC			104		Doctor Test
12m	Hanna	1	03/29/2014	20.00					CA					Doctor Test
-	messages	1												
ŵ	Consents													
	Disclosures													
Sc	ope													
۲	Patient													
C	Family													

Account

2. Click on the **Plus Credit** button - credit .

Note: To change the date of the refund from the current date, click on the down arrow next to the Date field and select a new date from the dropdown list.





3. Click the **dropdown** box next to the Pay method field and select the appropriate method of the overpayment. Choose from check, cash, credit card, etc.

	Patient's Credit Account	×						
Deposit Ledg	er							
Date:	8/27/2014 🗸							
Pay method:	~							
Name on card:	Check							
Card number:	Credit card (present) (MM/YY)							
Card status:	Credit card (on file)							
Check/Ref #:	Bank card							
Credit amount:	Family transfer							
	Insurance transfer							
	insurance. V Payer.							
Credit source:								
Note:								
Provider:	¥							
Patient Insurance								
Credit account	balances: 50.00 \$0.00							
	Save on Elle Save / Post Cance	1						
103								

Patient Credit Account

- **Note**: If the method of payment is check, you **MUST** also enter the check number in the Check/Ref # field.
- 4. Enter the amount of the overpayment in the Patient or Insurance Credit Amount field as appropriate.
- **Note**: For Insurance credits ONLY, you **MUST** also select the payer by clicking on the lookup button next to the Insurance Payer field.
- 5. Enter a Credit Source, if applicable.
- 6. Enter the credit details/explanation in the **Note** field.

Note: Include as many details as possible, including any information about an error or retraction, if applicable. (e.g., "Duplicate payment for date of service, xx/xx/xx").

7. Click on the **dropdown** box to the right of the provider field to select the individual provider the credit is being issued against, if applicable.

This feature is for offices who isolate payments and credits by provider for financial purposes.

8. Click the Save/Post button to return to the Patient Account.



Ø



Version 14.10

Path: Smart Toolbar > Account button > Credits tab

Overview

Overpayments can be received by a patient and/or an insurance payer via an EOB or an ERA. When a payer identifies an insurance overpayment, the payer will ultimately either request a refund or apply the overpayment to another patient account.

- File Activities Reports Utilities Log In/Out Tools Window Help D PEO + _ 8 × 3 . . 10 --Ø 3 5, B 1 -1 1.1 🔒 J) 🖻 2 8 é. Sched Rack Rgstr Insur Adr Bk Tasks Chart Chron Forms Super Accnt Billing Docs 0-0-12-0 Send IM e-Rx Printer Stamp Pref Chat 2 3 Overview Receipt 📥 Credit 📥 Refund -. Insurance Drag a column header here to group by that column 0 Charges Deposit Source Approva# Patient Patient Insurance Insurance Insur Dep Payment Claims 1 1 Date Note Entered by Credit Debit Credit Debit Carrier Meth Trx # 戡 Payments 08/27/2014 (70.25) RT Pt 104 0 Insurance Retracter Doctor Test 08/27/2014 15.25 PC RECOUP 0000000 AAB 112 RECOUP payment tr Doctor Test Credits 55.00 PC RECOUP 0000000 107 RECOUP payment tr Doctor Test 08/27/2014 AAB Statements 03/29/2014 (20,00)PC 104 Doctor Test ٤. Tasks 03/29/2014 CA 20.00 Doctor Test 11 Messages Consents Disclosures Scope Patient O Family
- 1. From the patient account, click on the **Credits** tab.

Account

2. Click on the Plus Credit button - Credit .

Note: To change the date of the refund from the current date, click on the down arrow next to the Date field and select a new date from the dropdown list.

3. Click the **dropdown** box next to the Pay method field and select the appropriate method of the overpayment. Choose from check, cash, credit card, etc.





	Patient's Credit Account	×					
Deposit Ledge	er						
Date:	8/27/2014 🗸						
Pay method:	✓						
Name on card:	Check						
Card number:	Cash Credit card (present) (MM/YY)						
Card status:	Credit card (on file)						
Check/Ref #:	Bank card						
Credit amount:	Transfer (general) Family transfer						
	Insurance transfer						
	insurance: V Payer. 😼						
Credit source:							
Note:							
Provider:	¥						
	Patient Insurance						
Credit account	balances: \$0.00 \$0.00						
	Save on Ele Save / Post Cancel						
103							

Patient Credit Account

Note: If the method of payment is check, you **MUST** also enter the check number in the Check/Ref # field.

4. Enter the amount of the overpayment in the Patient or Insurance Credit Amount field as appropriate.

Note: For Insurance credits ONLY, you **MUST** also select the payer by clicking on the lookup button next to the Insurance Payer field.

- 5. Enter a Credit Source, if applicable.
- 6. Enter the credit details/explanation in the Note field.

Note: Include as many details as possible, including any information about an error or retraction, if applicable. (e.g., "Duplicate payment for date of service, xx/xx/xx").

7. Click on the **dropdown** box to the right of the provider field to select the individual provider the credit is being issued against, if applicable.

• This feature is for offices who isolate payments and credits by provider for financial purposes.

8. Click the Save/Post button to return to the Patient Account.

