

Important Content Update Message



We are currently updating the OP Help Center content for the release of OP 20. We appreciate your patience as we continue to update all of our content. To locate the version of your software, navigate to: **Help tab > About**

How do I post patient balances and credits to OP from prior system?

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To post patient balances to OP from a prior (legacy) system, follow the steps below:

1. Navigate to the patient's chart.
2. Click **Charges** in the Window Navigation Panel.
3. Click the **New Claim** button. The Add/Edit Charges window is displayed.
4. Click the **SP** button in the Payer(s) section of the window to clear the patient's insurance for the claim.
5. Select the **Rendering Provider**.
6. In the Diagnosis section of the window, search for and select a 'balance forward' diagnosis or another miscellaneous/administrative diagnosis code.
7. In the Add CPT field, search for and select **BEGBAL** (or another CPT code set up by the practice).
8. In the Unit Chart and Charge amount fields, enter the **amount** of the patient's balance to be moved to OP.
9. Click **Save**. If you click **Save + Queue**, the claim will be added to the transmit queue and will have to be removed.

To post patient credits to OP from a prior (legacy) system, follow the steps below:

1. Navigate to the patient's chart.
2. Click **Credits** in the Window Navigation Panel.
3. Click the **New Credit** button.
4. From the Pay Method drop-down, select **Transfer (general)**. Selecting this method prevents the credit from looking like new revenue.
5. In the Patient Credit Amount field, enter the **amount** of the credit from the prior system.
6. Click **Save**. The credit is now available in OP for allocation to a patient balance.