Patient Chart: Payments

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Version 14.19

> *This window map article points out some of the important aspects of the window you're working with in OP but is not intended to be instructional. To learn about topics related to using this window, see the **Related Articles** section at the bottom of this page.*
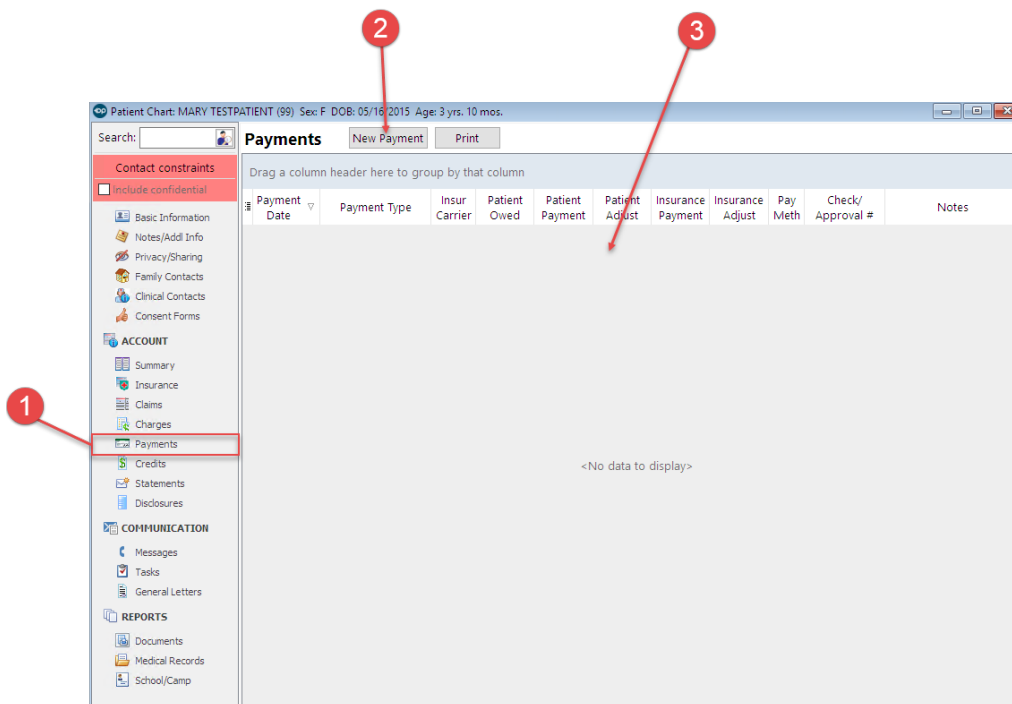
About Patient Chart: Payments

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

The Payments window displays the payments and adjustments received from the patient and payer(s). New payments can be posted from here.

> **Note**: Just like a paper chart, the electronic chart in OP contains personal health information and should be kept protected and confidential. Always close all windows on your screen and log out of OP when you are not at your workstation.

Patient Chart: Payments Map

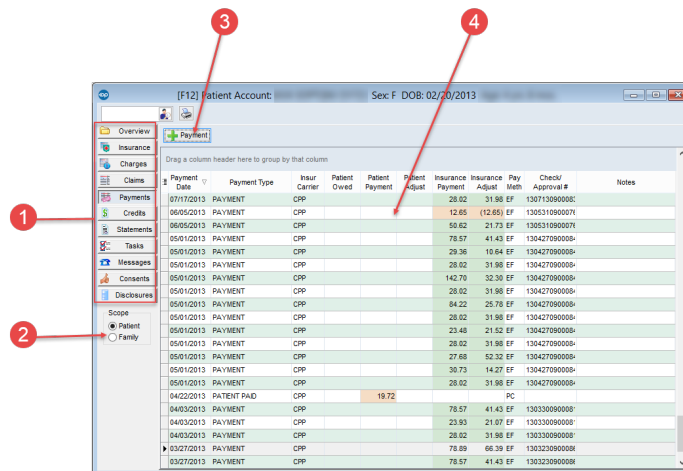| Number	Section	Description
1	Payments button	The Payments button accesses the Payment window in the patient's chart.
2	New Payment button	The **New Payment** button opens the **Add Payments and Adjustments** window for entry of a new payment os adjustment from the patient or insurance payer(s).
3	Payments grid	The Payments grid displays an ordered list of payments and adjustments received

from the patient and payer(s).

About Patient Account: Payments Tab

Path: Smart Toolbar > Account button > Payments tab

The Patient Account window maintains a patient's account. Some of the main functions that can be performed on a patient's account include:

- Enter a copay
- Post a charge manually
- Enter hospital charges
- Verify claim accuracy
- Post a patient payment
- Issue a patient refund
- Write an account note
- View claim history
- Print a CMS-1500
- Print a statement

The Payments tab displays an ordered list of payments received from the patient and payer. You can post payments from this location.

Patient Account: Payments Tab Map

Number	Section	Description
1	Patient Account tabs	The Patient Account contains the following tabs: • **Overview** • **Insurance** • **Charges** • **Claims** • **Payments** • **Credits** • **Statements** • **Tasks** • **Messages**

- **Consents**
- **Disclosures**

2	Scope	The Scope field narrows the parameters for the displayed information in the patient's account. Information can be displayed by patient or family.
3	+ Payment button	The **+ Payment** button opens the **Add Payments and Adjustments** window in order to apply or adjust a payment to the patient's account.
4	Payments grid	The Payments grid displays an ordered list of payments received from the patient and payer. Payments include direct payments.