Patient Chart: Credits

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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.*
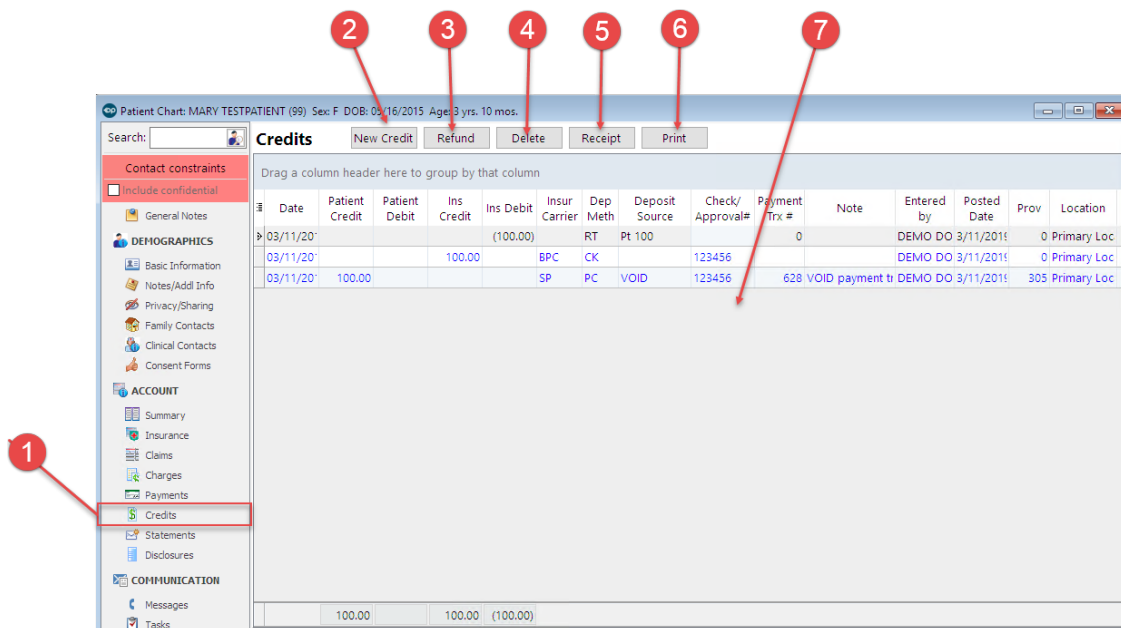
About Patient Chart: Credits

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

The Credits window displays an ordered list of patient and payer credits. You can post credits and refunds 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: Credits Map

Number	Section	Description
1	Credits button	The **Credits** button accesses the Credits window in the Patient Chart.
2	New Credit button	The **New Credit** button opens the **Patient's Credit Account** window to enter a patient or insurance credit to the patient account.
3	Refund button	The **Refund** button opens the **Patient's Credit Account** window to refund a credit from the patient's account.
4	Delete button	The **Delete** button deletes a highlighted credit in the Credit grid.

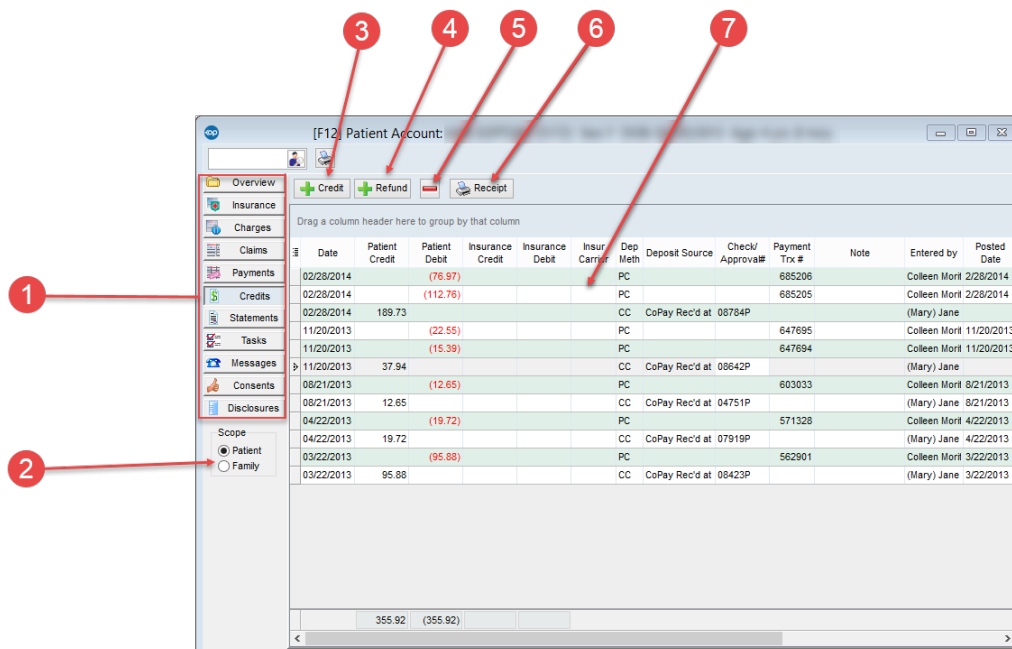| 5	Receipt button	The **Receipt** button prints a receipt of the selected patient credit.
6	Print button	The **Print** button prints the patient's entire patient credit list.
7	Credits/Refund grid	The Credits/Refund grid displays an ordered list of patient and payer credits.

Version 14.10

About Patient Account: Credits Tab

Path: Smart Toolbar > Account button > Credits 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 Credits tab displays an ordered list of patient and payer credits. You can post credits and refunds from this location.

Patient Account: Credits Tab Map

Number	Section	Description
		The Patient Account contains the following tabs: - **Overview** - **Insurance**

1	Patient Account tabs	• **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	+ Credit button	The **+ Credit** button opens the **Patient's Credit Account** window to enter a patient or insurance credit to the patient account.
4	+ Refund button	The **+ Refund** button opens the **Patient's Credit Account** window to refund a credit from the patient's account.
5	Delete button	The **Delete** button deletes a highlighted credit in the Credit grid.
6	Print button	The **Print** button prints a credit receipt for selected transactions.
7	Credits/Refund grid	The Credits/Refund grid displays an ordered list of patient and payer credits.