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.

Post a Returned Check

Last Modified on 02/21/2020 9:52 am EST

Version 14.19

Overview

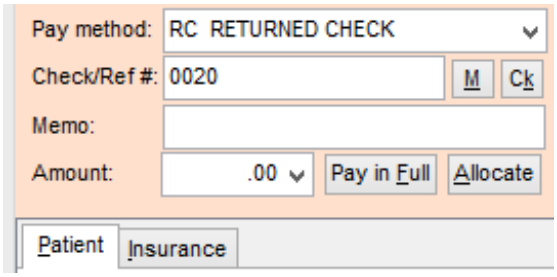
If a patient's check is returned for any reason, the returned check must be posted in order to keep a record of that transaction and reverse the payment made to reflect that a balance is still owed by the patient. Additionally, if the practice's policy is to charge a fee for the returned check, that fee charge may be entered into the patient's chart.

Post a Returned Check

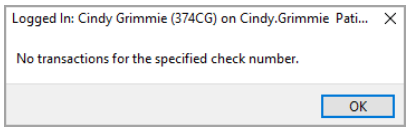
1. Navigate to the patient's chart.
2. Click **Payments** in the Chart Navigation Panel.
3. Click the **New Payment** button. The Add Payments and Adjustments window is displayed.
4. If not already selected, select the**Patient** tab.

Tip: The transaction to which the original payment was applied will not be displayed in this window because there is no balance due. Additionally, if the patient does not owe a balance for any dates of service, there are no transactions displayed in the grid. This is expected behavior. Continue with the steps below.

5. Use the Pay Method drop-down to select**RC Returned Check**.
6. In the Check/Ref # field, enter the check number of the check that was returned.

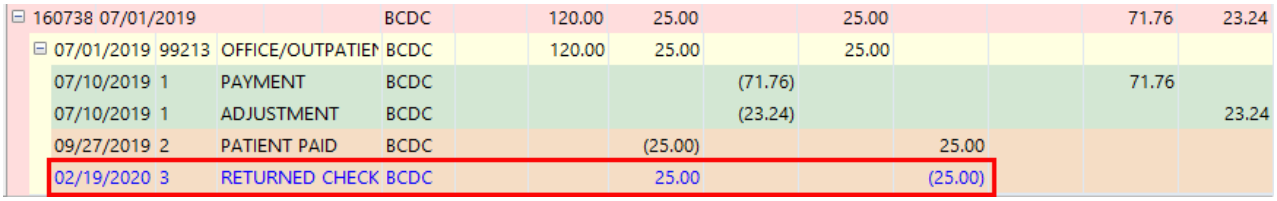


Note: The check number must be entered exactly as it was when the original payment was posted. If the entry does not match, the user will be presented with the following error:



To confirm the check number entered when the payment was posted, navigate to the Claims window and double-click the Patient Paid line to view the **check #**.

7. Click the **Save + Close** button. The Returned Check transactions are displayed in the Payments window as well as in the Claims window when the claim is expanded. The patient's balance for the claim is also calculated to reflect the payment reversal.



160738 07/01/2019			BCDC	120.00	25.00		25.00		71.76	23.24
07/01/2019	99213	OFFICE/OUTPATIEN	BCDC	120.00	25.00		25.00			
07/10/2019	1	PAYMENT	BCDC			(71.76)			71.76	
07/10/2019	1	ADJUSTMENT	BCDC			(23.24)				23.24
09/27/2019	2	PATIENT PAID	BCDC		(25.00)			25.00		
02/19/2020	3	RETURNED CHECK	BCDC		25.00			(25.00)		

Create a Charge for a Returned Check

1. Navigate to the patient's chart.
2. Click **Charges** in the Chart Navigation Panel.
3. Click the **New Claim** button. The Add/Edit Charges window is displayed.
4. Create a claim for the charge using the CPT code your practice has chosen to reflect this charge.
5. Ensure that the **Pat Only** checkbox is selected for the charge so that it is not reflected as an insurance balance.
6. Click the **Save** button.

Version 14.10

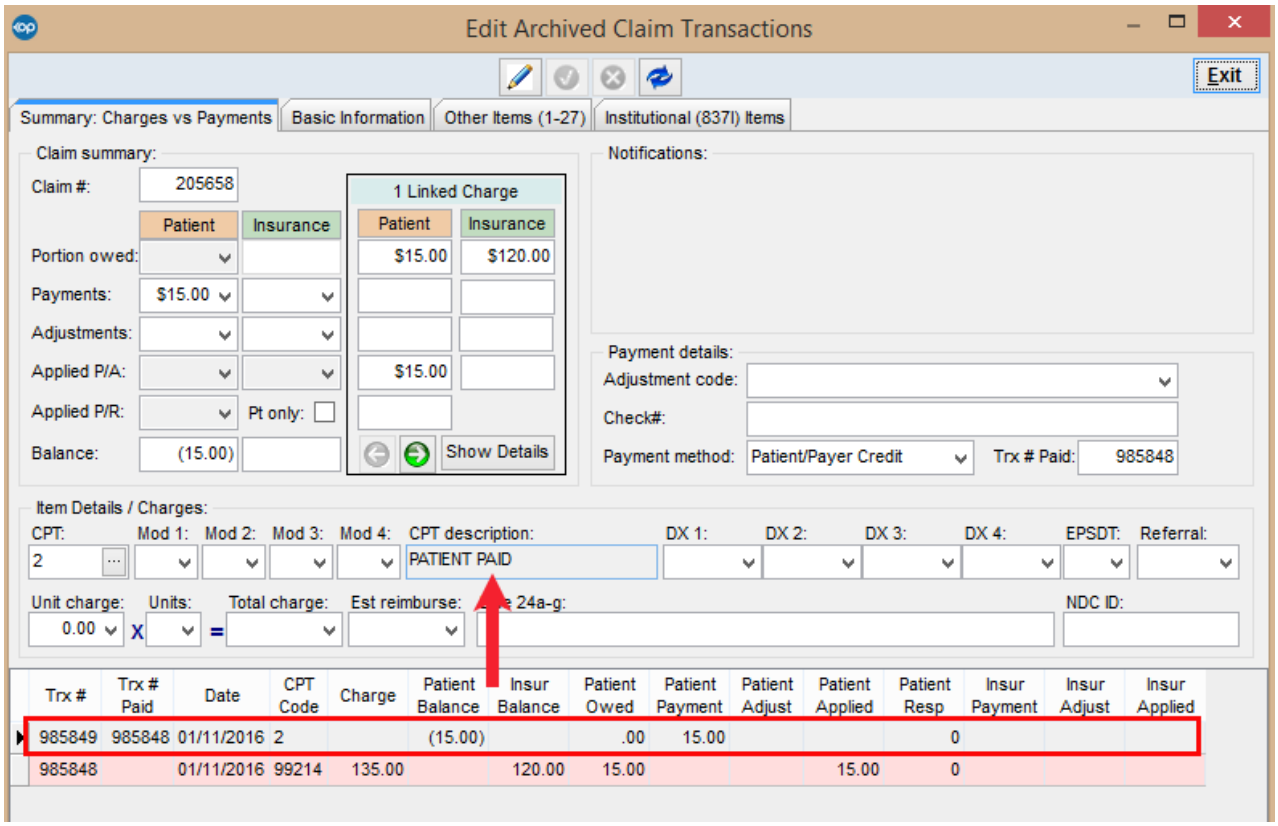
Overview

In the event that a patient's check is returned for any reason, you will want to post the returned

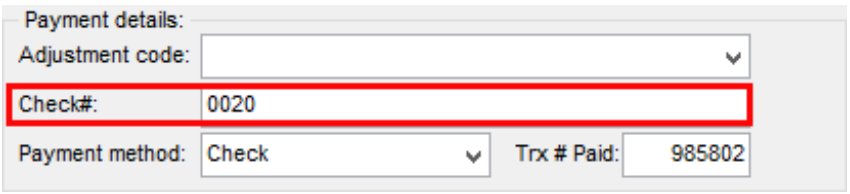
check in order to keep a record of that transaction. The instructions below will walk you through how to post a returned check.

To post a returned check:

1. Click the **Account** button.
2. Locate and select the patient.
3. Click the **Claims** tab.
4. Select the claim where the credit has been applied.
5. Click the **Edit** button . The Edit Archived Claim Transactions window appears.
6. Select the patient payment transaction line.



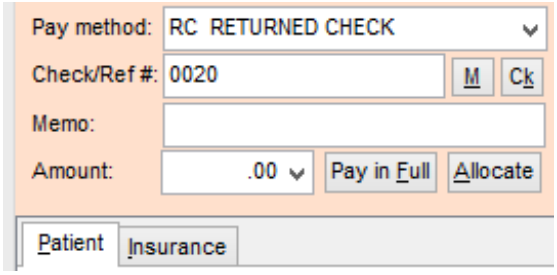
7. Enter the check number of the check that was returned (if it is not already entered) in the Payment Details field group.



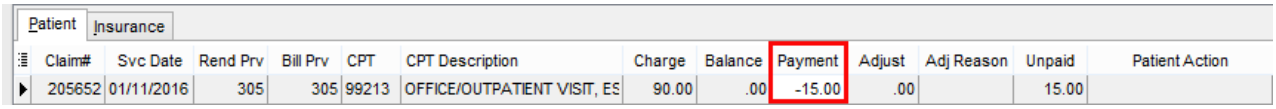
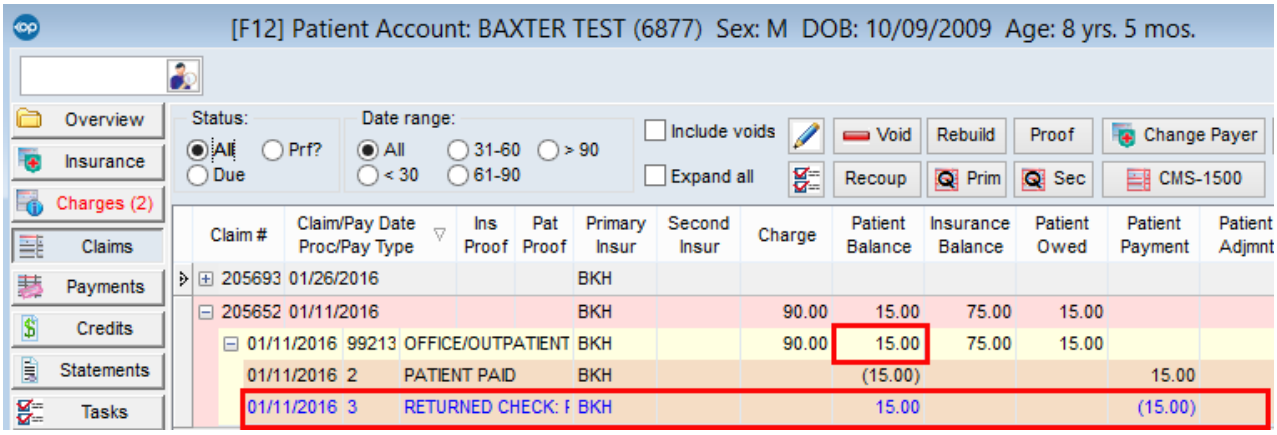
8. Click the Save changes to save.
9. If you had to enter the check number, you will receive a popup asking if you would like to

queue the corrected claim, click the **No** button.

10. Click the **Exit** button and return to the patient's Account screen.
11. Click the **Payments** tab.
12. Click **+ Payment button**.
13. Click the **Patient** tab.
14. Select **Returned Check** for the **Pay method** dropdown.
15. Enter the Returned check number in the**Check/Ref #** field.



16. Press **Enter** on your keyboard. This will create a negative payment on the claim line.



17. Click the **Save + Close** button.
18. Return to the **Claims** tab to view the reversal of the patient payment indicated as RETURNED CHECK and the amount now listed as a patient balance.