

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.

Posting Self Pay Charges and Patient Adjustments

Last Modified on 11/20/2019 8:59 am EST

Version 14.19

Overview

Prior to posting charges for a patient, it is important to verify their insurance. If a patient is a true self-pay (SP) patient, follow the instructions below to post their charges and apply adjustments (if appropriate). It is not necessary to add the SP payer to the patient's insurance record, as this payer functions behind the scenes. The instructions below apply to posting charges manually and posting electronic superbills. If an active insurance is *not* ranked in the patient's insurance record, the patient will appear to be SP.



Note: In order to seamlessly post SP charges for all providers, ensure that all providers have been associated to the SP payer in the Insurance Payer list. Visit [Connect Providers to Insurance Payers](#) for step-by-step instructions on this process.

Post Self Pay Charges

1. Navigate to the charges:
 - Click **Charges** in the Account section of the Window Navigation Panel
 - **Sched** button > **Tracking** tab
2. Click the **Post All** or **Post Selected** button depending upon what charges exist. The Add/Edit Charges window is displayed.
3. Notice that there is no insurance listed in the Payer(s) fields. Also, the Pat Resp fields display the full charge amount as dictated by the fee schedule. If you have an SP fee schedule, those charge amounts are displayed.

Add / Edit Charges: KATIE "MK" CANNON (99) Sex: F DOB: 05/16/1996 Age: 21 yrs. 10 mos.

Participants: Patient PCP: KWD CORA NOEL 681
Assisted by: 0
Rendered by: SJK Sloan J. Knox, MD 305
Supervised by: 0
Billing provider: SJK Sloan J. Knox, MD 305
Billing staff: CAM THEO DODSON 1874

Location: Office
Place of service: Office
Facility ID:
Hospital dates:
Office location: OPUC

Payer(s):
Primary: SP
Secondary: *

Dates / Diagnosis:
Service date(s): 4/6/2018 to:
Mod -25 TOS: 1 Convert labs to: 5
Mod -33 Use vaccine DX Find encounter DX

ICD-10 Description ICD-10
Click here to add a new diagnosis
Swimmer's ear, left ear H60.332

Patient responsibility:
Policy description (copay, coins, deductible, etc.)
Co-pay:
PCP Visit 0.00
Well Visit 0.00
After-Hours 0.00
Specialist 0.00
Lab 0.00
Co-insurance:
\$90.00 x 10%
Deductible/Self-pay:
 All procedures
 Satisfied for policy year

Balance: \$270.00 Credits: \$0.00 Apply Payments

Service Date	CPT	Mod1	Description	DX 1	DX 2	DX 3	DX 4	Unit Charge	Units	Charge	Payer Allowable	Pat Only	Pat Resp	EPSDT	EPSDT Referral	NDC Number	24-a-g Supplemental Info	Vax Cnsl
04/06/2018	99213		OFFICE/OUTP/ H60.332					90.00	1	90.00	90.00		90.00					

Claim: 205806 Q1 Transactions in the claim: 1

Save + Queue Save Cancel

If it is necessary to post patient adjustments to these charges, see the section below.

4. Click the **Save** or **Save + Queue** button depending on your preferred workflow.

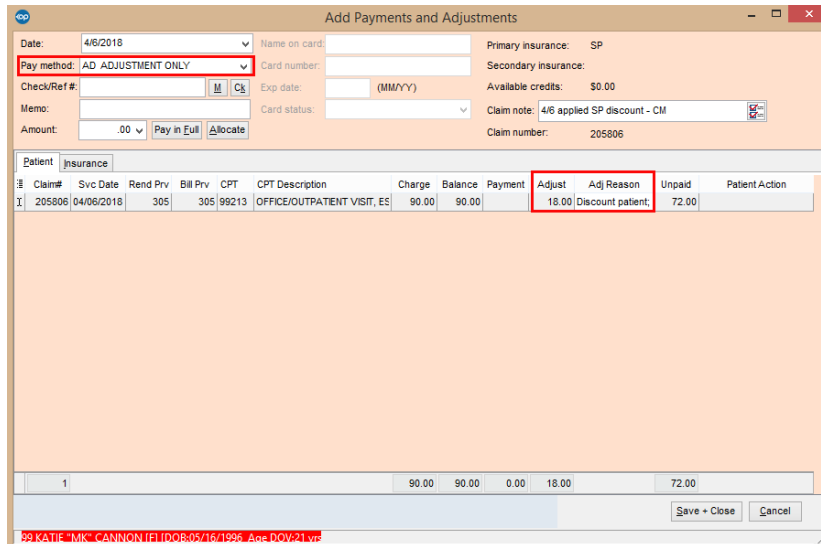
Post Patient Adjustments While Posting Self Pay Charges

1. Before clicking the Save or Save + Queue button, click the **Apply Payments** button. The Add Payments and Adjustments window is displayed.



Note: If the patient has balances for other dates of service, all dates with balances owed are displayed. Be sure to navigate to the line with the correct service date.

2. Select **AD ADJUSTMENT ONLY** from the Pay Method drop-down menu.
3. Enter the **amount** you would like to write off in the Adjust column.
4. Select an **Adj Reason** field from the drop-down menu. The Unpaid column displays the new patient responsibility.
5. Click the **Save + Close** button.
6. Click the **Save** or **Save + Queue** button in the Add/Edit Charges window.



Add Payments and Adjustments

Date: 4/6/2018 | Name on card: | Primary insurance: SP
 Pay method: AD ADJUSTMENT ONLY | Card number: | Secondary insurance:
 Check/Ref #: | Exp date: (MM/YY) | Available credits: \$0.00
 Memo: | Card status: | Claim note: 4/6 applied SP discount - CM
 Amount: .00 | Pay in Full | Allocate | Claim number: 205806

Claim#	Svc Date	Rend Prv	Bill Prv	CPT	CPT Description	Charge	Balance	Payment	Adjust	Adj Reason	Unpaid	Patient Action
I 205806	04/06/2018	305	305	99213	OFFICE/OUTPATIENT VISIT, ES	90.00	90.00		18.00	Discount patient	72.00	

1 | 90.00 | 90.00 | 0.00 | 18.00 | 72.00

Save + Close | Cancel

99 KATIE "MK" CANNON (F1)DOB:05/16/1996 Age:00621 yrs

Version 14.10

Overview

Prior to posting charges for a patient, it is important to verify their insurance. If a patient is a true self-pay (SP) patient, follow the instructions below to post their charges and apply adjustments (if appropriate). It is not necessary to add the SP payer to the patient's insurance record, as this payer functions behind the scenes. The instructions below apply to posting charges manually and posting electronic superbills. It should be noted that if an active insurance is not ranked in the patient's insurance record, the patient will appear to be SP.

Note: In order to seamlessly post SP charges for all providers, you will need to ensure that all providers have been associated to the SP payer in the Insurance Payer list. Visit [Connect Providers to Insurance Payers](#) for step-by-step instructions on this process.

Post Self Pay Charges

- Navigate to the charges:
 - Acct** button > **Charges** tab
 - Sched** button > **Tracking** tab
- Click the **Post All** or **Post Selected** button depending upon what charges exist. The Add/Edit Charges window will open.
- Notice that there is no insurance listed in the Payer(s) fields. Also, the Pat Resp fields show the full charge amount as dictated by the fee schedule. If you have an SP fee schedule, those charge amounts will show.

Add / Edit Charges: KATIE "MK" CANNON (99) Sex: F DOB: 05/16/1996 Age: 21 yrs. 10 mos.

Participants: Patient PCP: KWD CORA NOEL 681
Assisted by: 0
Rendered by: SJK Sloan J. Knox, MD 305
Supervised by: 0
Billing provider: SJK Sloan J. Knox, MD 305
Billing staff: CAM THEO DODSON 1874

Location: Place of service: Office
Facility ID:
Hospital dates:
Office location: OPUC

Payer(s): Primary: SP
Secondary: [Redacted]

Dates / Diagnosis: Service date(s): 4/6/2018 to:
Mod -25 TOS: 1 Convert labs to: 5
Mod -33 Use vaccine DX Find encounter DX

ICD-10 Description: Swimmer's ear, left ear H60.332

Patient responsibility: Policy description (copay, coins, deductible, etc.)
Co-pay: PCP Visit 0.00, Well Visit 0.00, After-Hours 0.00, Specialist 0.00, Lab 0.00
Co-insurance: \$90.00 x 10%
Deductible/Self-pay: All procedures, Satisfied for policy year

Balance: \$270.00 Credits: \$0.00 Apply Payments

Service Date	CPT	Mod1	Description	DX 1	DX 2	DX 3	DX 4	Unit Charge	Units	Charge	Payer Allowable	Pat Only	Pat Resp	EPSDT	EPSDT Referral	NDC Number	24a-g Supplemental Info	Vax Cnsl
04/06/2018	99213		OFFICE/OUTP/	H60.332				90.00	1	90.00	90.00		90.00					

Claim: 205806 Q1 Transactions in the claim: 1

Save + Queue Save Cancel

4. If it is necessary to post patient adjustments to these charges, see the section below.
5. Click the **Save** or **Save + Queue** button depending on your preferred workflow.

Post Patient Adjustments While Posting Self Pay Charges

1. Before clicking the **Save** or **Save + Queue** button, click the **Apply Payments** button. The Add Payments and Adjustments window will open.



If the patient has balances for other dates of service, all dates with balances owed will show. Be sure to navigate to the line with the correct service date.

2. In the **Pay Method** dropdown, select **AD ADJUSTMENT ONLY**.
3. Enter the amount you would like to write off in the **Adjust** column.
4. In the **Adj Reason** field, select the reason for adjustment.
5. The **Unpaid** column will display the new patient responsibility.
6. Click the **Save + Close** button.
7. Click the **Save** or **Save + Queue** button in the Add/Edit Charges window.

Add Payments and Adjustments

Date: 4/6/2018 Name on card: _____ Primary insurance: SP
 Pay method: **AD ADJUSTMENT ONLY** Card number: _____ Secondary insurance: _____
 Check/Ref #: _____ Exp date: (MM/YY) Available credits: \$0.00
 Memo: _____ Card status: _____ Claim note: 4/6 applied SP discount - CM
 Amount: .00 Pay in Full Allocate Claim number: 205806

Patient		Insurance											
Claim#	Svc Date	Rend	Prv	Bill Prv	CPT	CPT Description	Charge	Balance	Payment	Adjust	Adj Reason	Unpaid	Patient Action
I 205806	04/06/2018	305		305	99213	OFFICE/OUTPATIENT VISIT, ES	90.00	90.00	0.00	18.00	Discount patient	72.00	
							90.00	90.00	0.00	18.00		72.00	

Save + Close Cancel

99 KATIE MK CANNON | F1 | DOB: 05/16/1996 | Age: 20 | 621 | v...