

### 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.

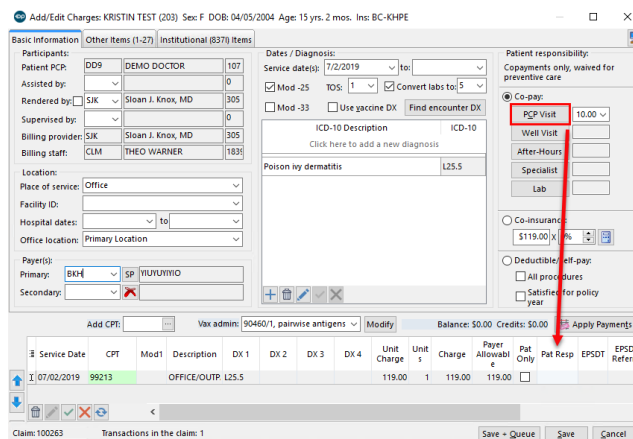
# Applying Copayments While Posting Charges

Last Modified on 11/20/2019 9:09 am EST

Version 14.19

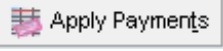
It is best practice to apply copayments that have been taken for services while posting your charges. Incorporating this into your workflow will decrease the amount of credits that need to be applied to balances prior to running statements. To apply a copy to a service while in the **Add/Edit Charges** window:

1. Click the **Charge Line** where the copay should be applied.
2. Click the **PCP visit** button. This populates the patient responsibility (as set in the patient's insurance record) on that charge line.



The screenshot shows the 'Add/Edit Charges' window for patient KRISTIN TEST. The 'Patient responsibility' section on the right has a 'Co-pay' dropdown menu set to 'PCP Visit' with a value of 10.00. A red box highlights this dropdown, and a red arrow points from it to the 'Apply Payments' button at the bottom right of the window. The main window displays a table of charges with the following data:

Service Date	CPT	Mod1	Description	DX 1	DX 2	DX 3	DX 4	Unit Charge	Unit	Charge	Payer Allowabl e	Pat Only	Pat Resp	EPSDT Referral
07/02/2019	99213		OFFICE/OUTP	L25.5				119.00	1	119.00	119.00			

3. Click the **Apply Payments** button . The Add Payments and Adjustments window is displayed.
4. Ensure that the Pay method is PC Patient Credit and that the copay amount are on the correct date of service.

Add Payments and Adjustments: KRISTIN TEST (203) Sex: F DOB: 04/05/2004 Age: 15 yrs. 2 mos. Ins: BC-KHPE

Date: 7/2/2019 Name on card: Primary insurance: BKH YIUVUYIYO  
 Pay method: PC PATIENT CREDIT Card number: Secondary insurance:  
 Check/Ref #: M Ck Exp date: (MM/YY) Available credits: \$10.00  
 Memo: Card status: Claim note:  
 Amount: 10.00 Pay in Full Allocate Activate Card Reader Claim number: 100263

Claim#	Svc Date	Rend Prv	Bill Prv	CPT	CPT Description	Charge	Balance	Payment	Adjust	Adj Reason	Unpaid	Patient Action
100263	07/02/2019	305	305	99213	OFFICE/OUTPATIENT VISIT, ES	119.00	10.00	10.00	.00		.00	

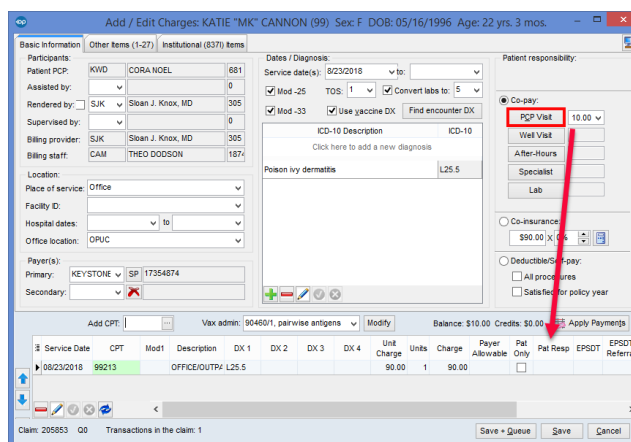
**Example:** The system automatically applies credits that match in dollar amount to the older dates first. For example, if a patient has a prior visit that still has a copay balance of \$10 but today's \$10 copay was paid, the system will place the \$10 payment on the prior date. You will need to manually delete the \$10 from the prior date and enter it on the correct line.

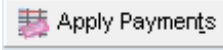
5. Click **Save + Close**. The Add/Edit Charges window is displayed to complete the charge entry.

Version 14.10

It is best practice to apply co-payments that have been taken for services while posting your charges. Incorporating this into your workflow will decrease the amount of credits that need to be applied to balances prior to running your statements. To apply a copay to a service while in the Add/Edit Charges window:

1. Click on the charge line where the copay should be applied and click the **PCP visit** button. This will populate the patient responsibility on that charge line.



2. Click the **Apply Payments** button . The Add Payments and Adjustments window will open.
3. Review the window to ensure that the Pay method is PC Patient Credit and that the copy amount appears on the correct date of service.

☰ Add Payments and Adjustments \_ □ ×

Date: 12/20/2013	Name on card: <input type="text"/>	Primary insurance: AET W12345678900
Pay method: <b>PC PATIENT CREDIT</b>	Card number: <input type="text"/>	Secondary insurance: MED 1213243434
Check/Ref #: <input type="text"/> <input type="button" value="M"/> <input type="button" value="Ck"/>	Exp date: <input type="text"/> (MM/YY)	Default statement type: <input type="radio"/> Ins + Pat Resp <input checked="" type="radio"/> Pat Resp Only
Memo: <input type="text"/>	Card status: <input type="text"/>	Claim note: <input type="text"/> <input type="button" value="⊞"/>
Amount: 25.00 <input type="button" value="Pay in Full"/> <input type="button" value="Allocate"/>	<input type="button" value="Activate Card Reader"/>	

Patient	Insurance	Claim#	Svc Date	Rend Prv	Bill Prv	CPT	CPT Description	Charge	Balance	Payment	Adjust	Adj Reason	Unpaid	Patient Action
I		100055	07/18/2013	107	107	81001	URINALYSIS, AUTO W/SCOPE	25.00	25.00	25.00			.00	

**i** OP 14 will automatically apply credits that match in dollar amount to the older dates first. For example, if a patient has a prior visit that still has a copay balance of \$10 but today's \$10 copay was paid, the system will place the \$10 payment on the prior date. You will need to manually delete the \$10 from the prior date and enter it on the correct line.

4. Click **Save + Close**. You will be returned to the **Add/Edit Charges** window.