

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.

Pull a Patient Credit Report

Last Modified on 11/07/2019 2:23 pm EST

Overview

It is recommended to pull a Patient Credit Report and apply available patient credits to balances prior to sending statements. This ensures that patients or families do not receive statements when money may have already been collected but not applied.

Access the Report

1. Navigate to: **Billing tab > Billing Center button > Overview tab > Billing Performance tab**
2. In the Patient Credits section of the window, click **Collected but not applied to charges**
3. Click the **first report icon** to the right of the hyperlinked dollar amount. The Patient Credit Account Summary Active Patients report opens. This report shows active patients with a balance (grouped by family) and the available patient and family credit amounts.



Patient Credits	
Collected but not applied to charges	\$590.90  

4. Print the report. The report will be used as a guide of what patient charts need to have the credits applied to balances.