

# CATEGORY: OLD PM BALANCE FORWARD

Most groups have outstanding patient balances to bring forward from their old system. The benefits of moving the balances include reducing time spent in two systems and the ability to send just one statement to each guarantor. The steps below outline the balance forward process. Keep in mind that the balance should be written off in the old system once it has been put into the new system.

Here is a recommended, systematic approach to bringing patient balances forward. Prior to each statement run, generate a report out of the old system that shows patients with only a patient balance (no more insurance outstanding). These are the balances to bring into the new system. Do this with each statement run to break up the project and ensure that you aren't ever working the same patient more than once.

## Step One

1. Create an Encounter for the Balance. Go to: Charges > [Post Charge]
2. Add a \$0 procedure line to the Encounter
  - Since this is a patient balance, choose Insurance 'SELF PAY'
  - For reporting purposes consider whether you need the exact provider, facility, DOS
  - Use MISC as the Diagnosis
  - Use BALFWD as the Procedure
  - The procedure line should have a \$0.00 fee. Tab through then click [Save F2]

**Post Charge**

Post Date: 07/26/2017

Patient: 10859 | TERRY | 67 years 0 M | M

Last Service: None (?) Appointment(s): None (?)

Case: - SELECT - Authorization: - SELECT -

Guarantor: TERRY (DEFAULT) Insurance: SELF PAY

Claim: Facility: POS: Rendering: Billing:

Referring: Supervising: Statement: PATIENT BILLING

Billing Note:

Diagnosis: **Dx 1: MISC** Dx 2: Dx 3: Dx 4: Dx 5: Dx 6: Dx 7: Dx 8: Dx 9: Dx A (10): Dx B (11): Dx C (12):

Dx Link: Billable: YES Fee: 0.00 Units: 1.00 Total: 0.00

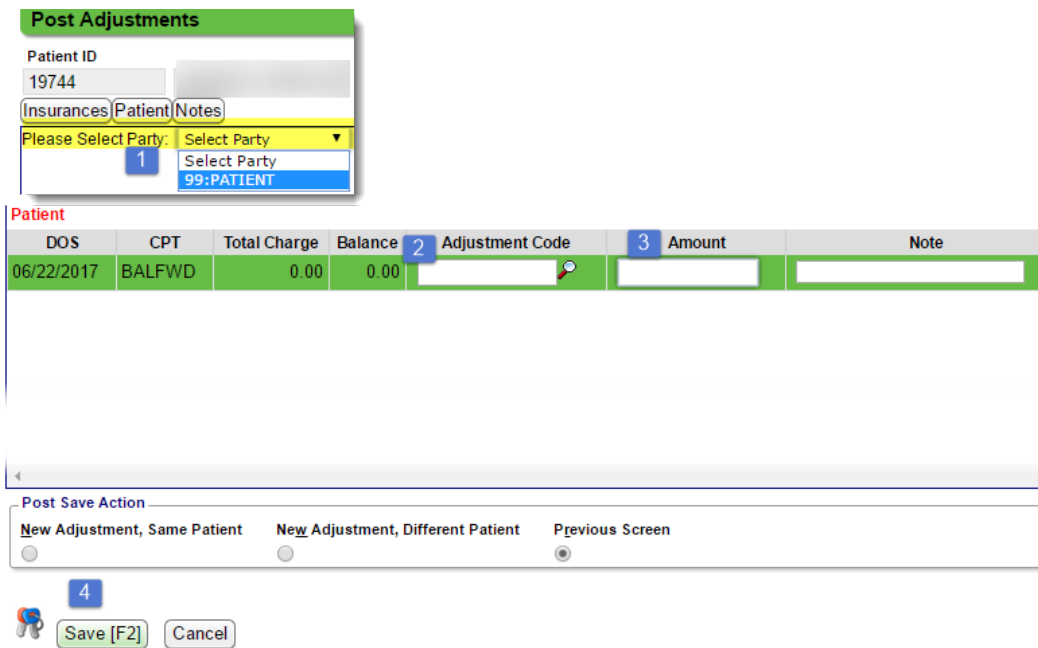
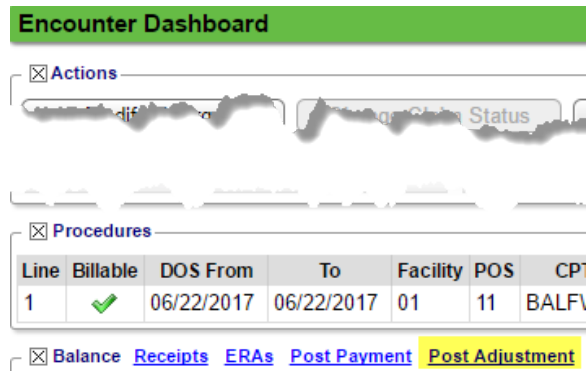
Line Note:

Line	Billable	DOS From	Facility	POS	Submit	CPT	M1	M2	M3	M4	Dx Link	Fee	Unit	Total	Payment
1	✓	07/26/2017			BALFWD	BALFWD					1	0.00	1.00	0.00	Copy

**Step Two**

Add the correct balance to the Encounter

1. From the Encounter > Click “Post Adjustment”
2. Select ‘Party’ 99:Patient
3. Use an adjustment code for either:
  - a. Debit- bringing forward a debit balance (patient owes you money)
  - b. Credit- bringing forward a credit balance (you owe the patient money)
4. The amount being brought forward
5. [Save/F2]



**How do I add a credit balance?**

Follow the steps above, then ADD a credit adjustment to the newly created zero balance Encounter representing the credit amount