

There are times when the patient pays more than they owe. We must apply the payment in full to an encounter to be able to send a refund or to reapply the patient credit to a different encounter \* *for additional information see the Help Center PDF > Patient Payment and Show Me How - Patient Credit Management*

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## How do I post patient payment where escrow is greater than the patient balance or force apply a patient credit?

From the Patient Receipt > Post. Then from 'Post Patient & Collections Payments' page, in the check box next to the line of an encounter you want to force the credit to:

**Hold the [CTRL] key on the keyboard while left clicking with your mouse, in the check-box.**

In this example the patient paid more than they owed:

Post Patient & Collection Payments Receipt: 109146

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**Receipt Info**

Receipt	Received Date	Posted	Check Date	Received Amount
109146	11/21/2019	11/21/2019		55.00

**Patient**  
962 TODD, SWEENEY L Balance 40.00

**Method**  
 Apply Manually Total Escrow 55.00

Patient	DOS [Encounter]	Charge	Balance	<input type="checkbox"/>	New Balance
[962] TODD, SWEENEY	11/05/2019 [66526]	40.00	40.00	<input type="checkbox"/>	40.00

**Include Additional Patients Under Same Guarantor [0] :**

**Total Escrow**  
0.00 😊

DOS [Encounter]	Charge	Balance	<input checked="" type="checkbox"/>	Applying	New Balance
11/05/2019 [66526]	40.00	40.00	<input checked="" type="checkbox"/>	55.00	-15.00

In the below example patient payment needs to be applied to charges that are not yet considered by Insurance, or is a zero dollar balance. *Such as when the patient pays a copay after the charge is entered or the encounter is paid in full.*

1. Use the 'SHOW' dropdown > choose 'All Services'
2. Control + click into the checkbox next to the DOS you want to apply to
3. [SAVE]

Post Patient & Collection Payments Receipt: 109153

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**Receipt Info**

Receipt	Received Date	Posted	Check Date	Received Amount
109153	12/15/2017	12/13/2017		25.00

**Patient**  
7377 LENNON, JOHN D Balance 0.00

**Guarantor**  
7362 LENNON, JOHN D Balance 0.00

**Statement Count Management**  
 Reset the Dunning Count for the below Encounters to DO NOT CHANGE

**Payment Application**

**Show**  
All Services 1

**Method**  
 Apply Manually Total Escrow 0.00 😊

Patient	DOS [Encounter]	Dunning/Statement Count	Charge	Balance	<input type="checkbox"/>	Coll
[7377] LENNON, JOHN	01/03/2015 [635]	0.00	270.00	0.00	<input type="checkbox"/>	
[7377] LENNON, JOHN	03/07/2015 [6600]	0.00	125.00	0.00	<input type="checkbox"/>	
[7377] LENNON, JOHN	02/26/2016 [47000]	0.00	15.00	0.00	<input type="checkbox"/>	
[7377] LENNON, JOHN	03/07/2016 [48229]	0.00	200.00	0.00	<input type="checkbox"/>	
[7377] LENNON, JOHN	12/20/2017 [66732]	0.00	131.74	0.00	<input checked="" type="checkbox"/>	2

Ctrl +

3

Save [F2] Cancel

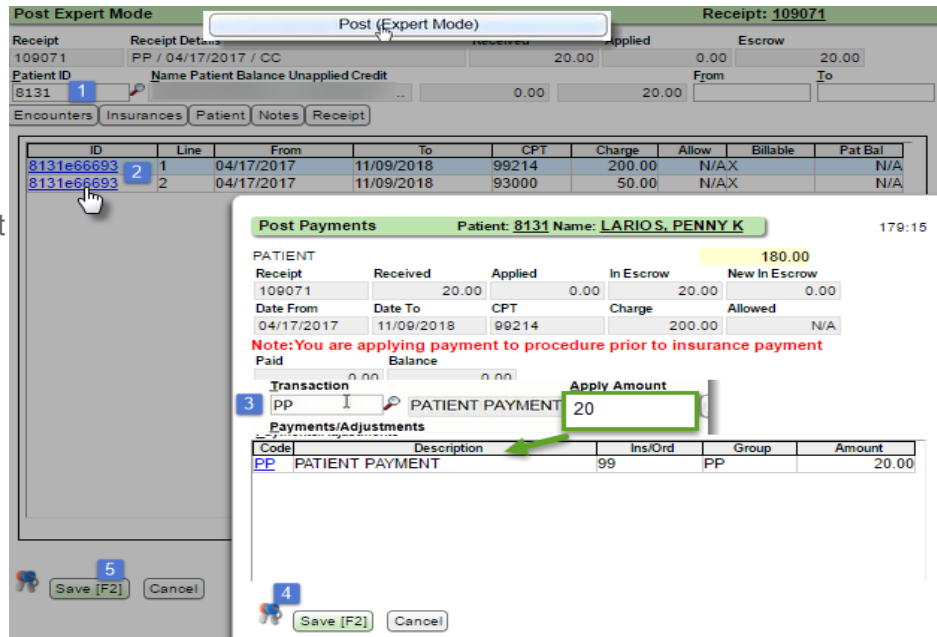
Look for the smiley face to indicate all the escrow is applied.

The 'force credit' feature is also available from the Encounter dashboard > [Re-Apply Patient Credit].

**How to use Post Expert to post a patient payment, 'PP' transaction**

If you need to post a patient payment (PP) transaction to a specific line for a specific amount, use [Post Expert Mode] on the PP receipt.

1. Key in the patient or encounter number
2. Choose the line item to post to
3. Use the transaction 'PP' and amount to post to that line
  - o there may be 'note' if the payment is not yet received from insurance
4. [Save]
5. If you have more lines to post do so now using steps 2-4 or [Save]

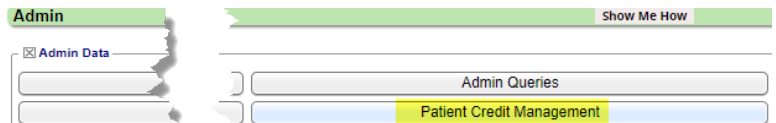


**Patient Credit Management**

This feature allows the Re-Apply Patient Credit function on the Encounter Dashboard to be used *across all Patients/Guarantors in one step.*

Patient Credit Management provides the ability to automatically Re-Apply Credits to outstanding debit balances.

Admin > [Patient Credit Management]



**Patient Credit Management** allows you to find and manage Patient credit balances. After choosing the appropriate filters, the "Re-Apply Credits" function will apply credits to existing debit balances.

The first Filter option 'Credit Application' allows you to determine if credits will be moved only between Encounters on a Patient, or also between Patients linked to the same Guarantor. Credits are always resolved in the following order; first at the Encounter level, then at the Patient level, and finally at the Guarantor level (if Guarantor is selected for Credit Application).

The transactions used in the Re-Apply Credits process are:

PD: Patient Debit Adjustment - adjustment applied against the credit balance

PCA: Patient Credit Applied - applied against the debit balance

\* see Help Center > PDF Patient Refund, Force Apply a Patient Credit

## How do I move or Re-Apply a patient credit at the encounter level?

This function is found on the Encounter Dashboard and is used to move a patient credit to a different line, encounter or patient. If there is any credit remaining after the re-apply, it will remain on the *original* Encounter.

1. On the Encounter > Click [Re-Apply Patient Credit]
2. On the Re-Apply Patient Credit page > First check the box next to the *Credit* amount to move the credit into Escrow
3. Check the box(s) where you want to apply the Credit (removes the money from Escrow)
4. [Save]

**Encounter Dashboard**

Actions: Modify Charge, Change Claim Status, To Collections, **1 Re-Apply Patient Credit**

Policy Breakdown: Insurance Management, Claim History, Payment History

Insurance: UNITED HEALTH CARE [104], BLUE CROSS / BLUE SHIELD [107]

DOS [Encounter]	Charge	Balance
01/03/2015 [635]	270.00	-17.17
<b>Total Escrow 17.17</b>		
01/03/2015 [635]	270.00	-17.17
12/20/2017 [66732]	131.74	131.74
<b>Total Escrow 0.00</b>		

**Re-Apply Patient Credits**

Receipt Info: Post Date 12/13/2017

Patient ID: 7377, LENNON, JOHN D, Patient Balance: 114.57

Guarantor ID: 7362, LENNON, JOHN D, Guarantor Balance: 114.57

Additional Patient: **A**

Payment App: **B** Show: Services With balance, Services With Balance, All Services

Include Additional Patients Under Same Guarantor: **C**

Patient	DOS [Encounter]	Charge	Balance	Applying	New Balance
LENNON, JOHN D [7377]	01/03/2015 [635]	270.00	-17.17	-17.17	0.00
LENNON, JOHN D [7377]	12/20/2017 [66732]	131.74	131.74	17.17	114.57
<b>Total Escrow 0.00</b>					

**4** Save [F2] Cancel

- (A) Additional patient look up - Allows us to apply the credit to a patient without the same guarantor
- (B) To apply the credit to an encounter that has not yet been adjudicated by insurance, use the 'Show' dropdown and choose 'All Services'
- (C) Filter to include other patients who have the same guarantor

The system automatically creates a new Patient Credit (PC), Receipt.

The Receipt contains the Patient Debit (PD) transaction codes, which indicates where the credit came FROM, and the Patient Credit Applied (PCA), which indicates where the credit is applied TO.

**Receipt History** Patient: 7377 Encounter: 635 Name: LENNON

Filter Criteria: Clear

Receipt: 12/13/2017 Received From: LENNON, JOHN D [7377] Received To: LENNON, JOHN D [7377] Posted From: 12/13/2017 Posted To: 12/13/2017 Type: Patient Credit [PC] Deleted: Exclude Escrow Only

Receipt	Received	Posted	Type	From/To	Reference	Method	Amount	Applied	Escrow
109152	12/13/2017	12/13/2017	PC	LENNON, JOHN [7377]			0.00	0.00	0.00

Encounter	Patient	From	To	Procedure	Type	Applied
635	7377	01/03/2015	12/02/2015	99204	PD	\$17.17
66732	7377	12/20/2017	12/20/2017	99213	PCA	\$17.17

In this screenshot we highlight the Receipt on the history page to view Encounter details.