

Adding Patient / Insurance Balance Forward

After going live with OD Professional, you might have to enter either an insurance or patient balance into each patient's account/record. This will be reviewed by the EMRlogic / OD Professional Implementation team with you during your business set-up.

To add a Patient Balance Forward

- Browse for and make the patient active.
- Double click on the Patient Account folder
- Create New Invoice
- Confirm Encounter Date and Provider
- Confirm that the insurance is set to Self Pay
- Enter BALFD* as the Procedure code and 367.1 as the diagnostic code
- Enter Balance Forward in the Amount column and tab over to the next cell
- Confirm amount set in Patient Amount column
- Click Save Charge
- Click Post All

New Invoice		02/27/2009 Inv 0002539 \$ 0.00		02/24/2009 Inv 0002532 \$ 0.00									
	Pt	Trans Num	From Date	N T	BCD	Ins Cod	Proc Code	Procedure Description	Diag Code	Amount	Un its	Insurance Amount	Patient Amount
	1				SEL	SEL	BALF	Balance Forwar	367.1	\$ 150.00	1	\$ 0.00	\$ 150.00

To add an Insurance Balance Forward

- Browse for and make the patient active.
- Double click on the Patient Account folder
- Create New Invoice
- Confirm Encounter Date and Provider
- Confirm that the insurance is set to Insurance Plan with the outstanding balance
- Enter BALFD* as the Procedure code and 367.1 as the diagnostic code
- Enter Balance Forward in the Amount column and tab over to the next cell
- Confirm amount set in Insurance Amount column
- Click Save Charge
- Click Post All

New Invoice		02/27/2009 Inv 0002539 \$ 0.00		02/24/2009 Inv 0002532 \$ 0.00									
	Pt	Trans Num	From Date	N T	BCD	Ins Cod	Proc Code	Procedure Description	Diag Code	Amount	Un its	Insurance Amount	Patient Amount
	1				VSP	VSP	BALF	Balance Forwar	367.1	\$ 150.00	1	\$ 150.00	\$ 0.00

***The Balance Forward procedure code may be indicated by something other than BALFD in your set-up. Please consult with your OD Professional Implementation Team.**