

Crediting Transactions and Invoices

To maintain the integrity of your financial records, you should never delete any financial transactions, but instead credit the transaction line or the entire invoice.

There will be times when you will need to credit a specific transaction line or an entire invoice. For example, if a patient's check is returned for insufficient funds, you'll need to open the original invoice and credit the payment.

Entering Adjustments or Discounts

1. Browse for and make the patient active.
2. Double click on the Patient Account folder under the patient record
3. Activate the invoice you want to credit.
4. Select the transaction lines you want to credit.
5. Right mouse click and select Credit the Selected Transactions.
6. Confirm Insurance (e.g. Primary, Secondary, Other)
7. Enter and Save all charges
8. Right mouse click on the invoice
9. Select Make Adjustments
10. Enter amount of Adjustment or Discount
 - If you need to calculate the total amount of the adjustment or discount, click the calculator icon next to the amount field. The calculator will automatically total all charges on the invoice. If the total amount is different, enter the correct amount.
11. Calculate the adjustment or discount using the calculator and Click OK
12. Change the Billing Code to the correct Adjustment or Discount (e.g. Co-Pay, Credit, Savings, Doctor's Courtesy, etc.)
 - To add additional options for Adjustments or Discounts, enter them in the Billing Code Table (e.g. Employee Savings, 2nd Pair Savings, etc.)
13. Select the Transaction to Apply. (This is usually the first transaction number)
14. Enter the Transaction Description (This is what prints on the patient's statement) and Click OK
 - To show value to the patient, always remember to enter a transaction description that accurately describes the adjustment or discount they are receiving.
15. Enter Patient Payments (if applicable)
16. Click Post All
17. Print Walk Out Statement