

Azalea Health Credit Balances Guide

IN AZALEA:





GENERATE the **Credit Balance Report** (01/01/00 - Today):

Report Filters

Please ensure that you have access to the necessary providers (including disabled providers) before run

Report Name:	Credit Balance Report		
From Date:	01/01/2000	Month To Date	Year-to-Date
To Date:	08/30/2020	Today	
Provider:	All Providers		
Location:	All Locations		
Place of Service:	All Places of Service		
Run Report After Hours:	<input type="checkbox"/> Schedule Report To Run After Hours?		
Generate Report Generate Report & Close Save Configuration			

DOWNLOAD
Excel version:

Status	After Hours	Actions
Report Ready	No	    

IN EXCEL:

DELETE Patient Name, Provider, Location Mnemonic, and Location columns:

C	D	E	F	G
PATIENT NAME	PROVIDER	DATE OF SERVICE	LOCATION MNEMONIC	LOCATION
		9/9/2019		

FORMAT Patient Balance and Encounter Balance columns to **NUMBER**:

Excel interface showing the **Number** format applied to the **PATIENT BALANCE** and **ENCOUNTER BALANCE** columns.

Font: Calibri, 11. Alignment: Center. Wrap Text: On. Merge & Center: Off.

B	C	D	E	F
STATUS	DATE OF SERVICE	PATIENT BALANCE	ENCOUNTER BALANCE	
Patient Credit	9/9/2019	(\$15.00)	(\$15.00)	

Format pane: **Number** PATIENT BALANCE.

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ADD a column to the far right, titled **EQUALS**.
ENTER the **True/False** equation (ex: **=E2=D2**) in the first cell under **EQUALS**:

C	D	E	F
DATE OF SERVICE	PATIENT BALANCE	ENCOUNTER BALANCE	EQUALS
9/9/2019	-15.00	-15.00	=E2=D2
10/22/2019	-2.00	-2.00	
10/22/2019	-67.20	-67.20	
10/29/2019	-19.97	-19.97	

DOUBLE CLICK the small green square to cascade the formula all the way down to the bottom of the spreadsheet:

D	E	F
PATIENT BALANCE	ENCOUNTER BALANCE	EQUALS
-15.00	-15.00	TRUE
-2.00	-2.00	

FILTER to **TRUE**, which are encounters with balances equal to the patient balance:

STATUS	DATE OF SERVICE	PATIENT BALANCE	ENCOUNTER BALANCE	EQUALS
Patient Credit	9/9/2019	-15.00		
Patient Credit	10/22/2019	-2.00		
Patient Credit	10/22/2019	-67.20		
Patient Credit	10/29/2019	-19.97		
Patient Credit	11/1/2019	-17.48		
Patient Credit	11/8/2019	-27.54		
Patient Credit	11/13/2019	0.00		
Patient Credit	11/19/2019	-0.25		
Patient Credit	11/25/2019	-50.00		
Patient Credit	1/7/2020	-17.48		
Patient Credit	1/13/2020	-20.00		
Patient Credit	1/23/2020	-15.00		
Patient Credit	2/18/2020	29.22		
Ins Credit	2/18/2020	-38.68		

Sort Smallest to Largest

Sort Largest to Smallest

Sort by Color

Sheet View

Clear Filter From "EQUALS"

Filter by Color

Number Filters

Search

(Select All)

FALSE

TRUE

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Select all **TRUE** encounters, Right Click and **DELETE**, then CLEAR filter:

B	C	D	E	F
STATUS	DATE OF SERVICE	PATIENT BALANCE	ENCOUNTER BALANCE	EQUALS
Patient Credit	9/9/2019	-15.00	-15.00	TRUE
Patient Credit	10/22/2019	-2.00	-2.00	TRUE
Patient Credit	10/22/2019	-67.20	-67.20	TRUE
Patient Credit	10/29/2019	-19.00	-19.00	TRUE
Patient Credit	11/8/2019	-27.00	-27.00	TRUE
Patient Credit	11/19/2019	-0.00	-0.00	TRUE
Patient Credit	11/25/2019	-50.00	-50.00	TRUE
Patient Credit	1/13/2020	-20.00	-20.00	TRUE
Patient Credit	1/23/2020	-15.00	-15.00	TRUE
Patient Credit	2/19/2020	-87.00	-87.00	TRUE
Patient Credit	2/27/2020	-10.00	-10.00	TRUE
Patient Credit	3/10/2020	-2.00	-2.00	TRUE
Patient Credit	3/10/2020	-2.00	-2.00	TRUE
Patient Credit	4/13/2020	-38.00	-38.00	TRUE
Patient Credit	5/13/2020	-2.00	-2.00	TRUE
Patient Credit	5/21/2020	-10.00	-10.00	TRUE
Patient Credit	5/22/2020	-25.00	-25.00	TRUE

The **EQUALS** column should all be **FALSE** now. **ADD** a column to the far right titled **PT < EN**. Enter the **Less Than** equation (ex: **=D2<E2**) in the first cell under the **PT < EN** column.

C	D	E	F	G
DATE OF SERVICE	PATIENT BALANCE	ENCOUNTER BALANCE	EQUALS	PT < EN
11/1/2019	-17.48	-7.48	FALSE	=D2<E2
11/13/2019	0.00	-4.00	FALSE	
1/7/2020	-17.48	-10.00	FALSE	
2/18/2020	29.22	-25.00	FALSE	

DOUBLE CLICK the small green square to cascade the formula all the way down to the bottom of the spreadsheet:

D	E	F	G
PATIENT BALANCE	ENCOUNTER BALANCE	EQUALS	PT < EN
-17.48	-7.48	FALSE	TRUE
0.00	-4.00	FALSE	

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FILTER to **TRUE**, which are encounters with balances that can't be transferred:

C	D	E	F	G
DATE OF SERVICE	PATIENT BALANCE	ENCOUNTER BALANCE	EQUALS	PT < EN
11/1/2019	-17.48	-7.48		
1/7/2020	-17.48	-10.00		
2/18/2020	-38.68	-34.11		
4/28/2020	-4.00	-2.00		
5/11/2020	-4.00	-2.00		
5/19/2020	-50.00	-25.00		
6/3/2020	-4.00	-2.00		
6/12/2020	-4.00	-2.00		
6/25/2020	-50.00	-25.00		

Sort Smallest to Largest

Sort Largest to Smallest

Sort by Color

Sheet View

Clear Filter From "PT < EN"

Filter by Color

Number Filters

Search

(Select All)

FALSE

TRUE

Select all **TRUE** encounters, Right Click and **DELETE** then CLEAR filter:

C	D	E	F	G
DATE OF SERVICE	PATIENT BALANCE	ENCOUNTER BALANCE	EQUALS	PT < EN
11/1/2019	-17.48	-7.48		
1/7/2020	-17.48	-10.00		
2/18/2020	-38.68	-34.11		
4/28/2020	-4.00	-2.00		
5/11/2020	-4.00	-2.00		
5/19/2020	-50.00	-25.00		
6/3/2020	-4.00	-2.00		
6/12/2020	-4.00	-2.00		
6/25/2020	-50.00	-25.00		

Calibri 11 A A \$ % ,

B I

Cut

Copy

Paste Options:

Paste Special...

Insert Row

Delete Row

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Sort entire sheet by **ENCOUNTER #**, then Filter **STATUS** to everything except **PATIENT CREDIT**:

1	ENCOUNTER #	STATUS	DATE OF SERVICE	PATIENT BALANCE	ENCOUNTER BALANCE	EQUALS	PT < EN
A Z	Sort A to Z		/2019	0.00	-4.00	FALSE	FALSE
Z A	Sort Z to A		2020	29.22	-25.00	FALSE	FALSE
			020	0.00	-29.49	FALSE	FALSE
	Sort by Color	>	020	0.00	-3.00	FALSE	FALSE
	Sheet View	>	020	0.00	-2.40	FALSE	FALSE
	Clear Filter From "STATUS"		2020	0.00	-84.32	FALSE	FALSE
			2020	-5.00	-15.00	FALSE	FALSE
	Filter by Color	>					
	Text Filters	>					
	Search						
	<input type="checkbox"/> (Select All)						
	<input checked="" type="checkbox"/> Ins Credit						
	<input type="checkbox"/> Patient Credit						

DELETE visible rows and CLEAR filter. You should be left with **STATUS** column of only Patient Credit, **EQUALS** column of only FALSE and **PT < EN** column of only FALSE:

B	C	D	E	F	G
STATUS	DATE OF SERVICE	PATIENT BALANCE	ENCOUNTER BALANCE	EQUALS	PT < EN
Patient Credit	11/13/2019	0.00	-4.00	FALSE	FALSE
Patient Credit	2/18/2020	29.22	-25.00	FALSE	FALSE
Patient Credit	7/31/2020	-5.00	-15.00	FALSE	FALSE

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IN AZALEA:

COPY **Encounter #** from Excel

ENCOUNTER #	STATUS	DATE OF SERVICE	PATIENT BALANCE	ENCOUNTER BALANCE	EQUALS	PT < EN
XXXX136A1	Patient Credit	11/13/2019	0.00	-4.00	FALSE	FALSE
XXXX308A1	Patient Credit	2/18/2020	29.22	-25.00	FALSE	FALSE
XXXX551A1	Patient Credit	7/31/2020	-5.00	-15.00	FALSE	FALSE

PASTE **Encounter #** into Encounter List search bar

Home Scheduler Patients **Encounters** Payments Documents Reports Settings Support

Azalea EHR

XXXX136A1 Search New Encounter

Encounters List

In the Encounter, FIND the **Patient Payment** causing the credit and click the blue arrow:

PATIENT	\$(46.61)	99201	CREDIT CARD	-	Jun 30	-	
PATIENT	\$(4.00)	99201	CREDIT CARD	-	Jun 30	-	

CPT Code / Charge Subtotal: \$(4.00) Next Payer: CREDIT

Find an Encounter to transfer the payment to and click the **Transfer** button:

Amount: \$4.00

☒ Show only patient responsibility ☒ Hide zero balance CPTs

DOS	Provider	Status	Balance	Next Payer	CPT Code	Apply Amount	Transfer
06/23/2020		Billed	\$4.00	PATIENT	10060	4.00	Transfer Undo

10 per pageShowing page 1 of 1 (1 - 1 of 1) Go

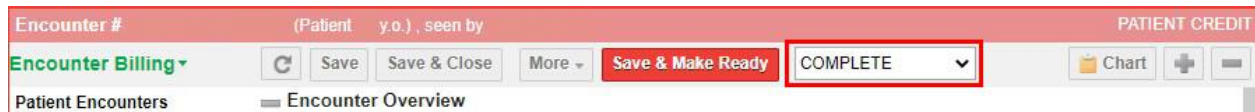
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APPLY to the **OLDEST** encounter first

TRANSFER **only amount** on spreadsheet to Patient Responsibility balances

Always make sure you are **only** transferring **Patient Payments**

If the Credit Balance is used up, **EDIT** the encounter and change status to **COMPLETE**



This screenshot shows the 'Encounter Billing' interface. At the top, there's a header bar with 'Encounter #', '(Patient y.o.) , seen by', and 'PATIENT CREDIT'. Below this is a toolbar with buttons: 'Save', 'Save & Close', 'More', 'Save & Make Ready', and a dropdown menu currently set to 'COMPLETE'. To the right of the dropdown are 'Chart', '+', and '-' buttons. Below the toolbar, there's a section for 'Patient Encounters' with a toggle for 'Encounter Overview'.

Leave the encounter in **PATIENT CREDIT** if a Credit Balance remains:



This screenshot shows the 'Encounter Billing' interface. The header bar is blue and contains 'Encounter #', '(Patient y.o.) , seen by', and 'PATIENT CREDIT'. The toolbar includes buttons: 'Edit', 'Print', 'More', 'Make Ready', and a dropdown menu set to 'Current Version'. To the right are 'Chart', '+', and '-' buttons.