Azalea Health Credit Balances Guide

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

DOWNLOAD
Excel version:

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

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

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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:

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		TRUE
Patient Credit	11/8/2019	-27		TRUE
Patient Credit	11/19/2019	-0.		TRUE
Patient Credit	11/25/2019	-50	00	TRUE
Patient Credit	1/13/2020	-20	00	TRUE
Patient Credit	1/23/2020	-15	00	TRUE
Patient Credit	2/19/2020	-87	74	TRUE
Patient Credit	2/27/2020	-10	.56	TRUE
Patient Credit	3/10/2020	-2.	0	TRUE
Patient Credit	3/10/2020	-2.	0	TRUE
Patient Credit	4/13/2020	-38	68	TRUE
Patient Credit	5/13/2020	-2.	0	TRUE
Patient Credit	5/21/2020	-10	00	TRUE
Patient Credit	5/22/2020	-25	00	TRUE

(context menu shown: Cut, Copy, Paste Options:, Paste Special..., Insert Row, Delete Row)

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.

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:

PATIENT BALANCE	ENCOUNTER BALANCE	EQUALS	PT < EN
-17.48	-7.48	FALSE	TRUE
0.00	-4.00	FALSE	

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

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

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

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

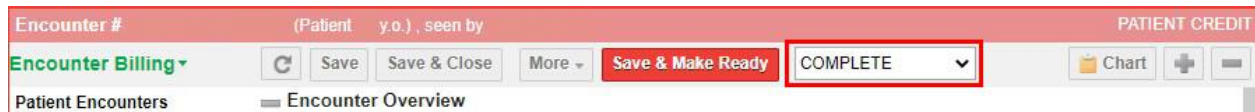10   per pageShowing page 1 of 1 (1 - 1 of 1)   Go |◄ ◄ ► ►|

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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**

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