

## Change the Guarantor Account for a Specific Encounter

When a guarantor account is valid for a patient but is not valid for a specific encounter (for example, when the patient has an injury covered by workers' compensation and won't use his personal/family account), change the guarantor for that encounter.



Refer to the *Correcting the Guarantor* section of the *Correct Treatment Charged Out* SRG for steps to change the guarantor on a past encounter.

1. Open the patient's Appointment Desk and select the applicable appointment from the **Future** tab.
2. Click **Reg Appointment Contact** to open Registration.
3. Click the pencil (✎) icon in the **Encounter Guarantor and Coverages** section to open it.
4. Select the correct guarantor for the encounter.



Refer to the *Create Guarantor Accounts* SRG for steps to add a new guarantor account.

5. Click **✓ Close**.

## Deactivate a Guarantor Account for a Patient

You should mark a guarantor account as inactive for a patient when that guarantor is no longer responsible for the patient's bill. A common example is when a child turns 18 and his parent is no longer his guarantor.

1. Open the patient's **Registration**.
2. Click **Patient Guar and Cvg** on the activity toolbar.
3. Under the **Patient Guarantor Accounts** section, click the **✓ Active** checkbox to remove the check mark for the guarantor account that is no longer valid.
  - a. If the **Break Address Link** window appears, click **✓ Yes**.
4. Click the **close (X)** icon to close the **Patient Guarantor and Coverages** tab and return to the Interactive Face Sheet.







To see deactivated guarantor accounts, select the **Show Inactive Guarantors** checkbox. You can tell inactive accounts apart from active ones by looking at the **✓ Active** checkbox. The checkbox is not selected for inactive accounts.

## Remove a Guarantor Account Added in Error

Guarantor accounts should only be removed if it was added in error and was never valid for the patient. It does not delete the guarantor account, only removes it from being associated with the patient. Only managers can remove a guarantor account from a patient's record.

To flag the invalid one for removal:

1. Open the patient's Appointment Desk.
2. Click  **Patient Options** ▼ and select  **Registration**.
3. Click  **Patient Guar and Cvg** on the activity toolbar.
4. Under the **Patient Guarantor Accounts** section, to the right of each guarantor account listed, you can click the **remove** (✕) icon to remove a guarantor account.
5. This will open the **Remove Guarantor Account** window, click  **Remove Guarantor** to delete the selected guarantor account.

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