

Insurance / Patient Balance Write-off from Patient statement screen:

From the detail search option select the criteria and search the patient by selecting “Due Ins” and click “Search” button will bring the below screen.

Billing Manager

Payments

Receivables

Patient Accounts

Reports

Preferences

Patient Ledger

Patient Statement

Authorization

Patient Name/ID: Encounter: From: 2013-01-01 To: 2013-01-31

Q

Action▼

Patient	Invoice	Svc Date	Last Stmt	Charge	Adjust	Total Paid	Copay	Pt Paid	Ins Paid	Ins Bal	Pat Bal >>	Stmt Ct	Sel
1)	3.591	2013-01-08		195.00						195.00	➡ 0	0	<input checked="" type="checkbox"/> [+]
				195.00	0.00	0.00	0.00	0.00	0.00	195.00			
2)	29.123	2013-01-09		440.00						440.00	➡ 0	0	<input checked="" type="checkbox"/> [+]
	29.470	2013-01-23		440.00						440.00	➡ 0	0	<input checked="" type="checkbox"/> [+]
				880.00	0.00	0.00	0.00	0.00	0.00	880.00			
3)	34.294	2013-01-10		440.00						440.00	➡ 0	0	<input checked="" type="checkbox"/> [+]
				440.00	0.00	0.00	0.00	0.00	0.00	440.00			
4)	37.104	2013-01-07		440.00						440.00	0	0	<input type="checkbox"/> [+]
	37.148	2013-01-14		440.00						440.00	0	0	<input type="checkbox"/> [+]
	37.981	2013-01-28		440.00						440.00	0	0	<input type="checkbox"/> [+]
				1,320.00	0.00	0.00	0.00	0.00	0.00	1,320.00			
5)	116.904	2013-01-25		260.00						260.00	0	0	<input type="checkbox"/> [+]
				260.00	0.00	0.00	0.00	0.00	0.00	260.00			
6)	144.129	2013-01-04		440.00						440.00	0	0	<input type="checkbox"/> [+]
				440.00	0.00	0.00	0.00	0.00	0.00	440.00			
7)	149.817	2013-01-24		195.00						195.00	0	0	<input type="checkbox"/> [+]
	149.854	2013-01-31		195.00						195.00	0	0	<input type="checkbox"/> [+]
				390.00	0.00	0.00	0.00	0.00	0.00	390.00			

From the above screen select the respective patient accounts which need to make write-off before moving the balance to Patient account.

After selecting the patient accounts click on “Action” and select “Write-off” will bring the below screen.

Write off reason:

Pid	Encounter	Code	Modifier	Visit Category	Fee	Balance	Write Off Percentage	Write Off Amount	Notes	Write Off Ent.Amt.
3	591	97530		Individual OT - 30 mins	195.00	195.00	<input type="text" value="100"/> %	<input type="text" value="195.00"/>		<input type="checkbox"/>
29	123	92507		Individual ST - 30 mins	220.00	220.00	<input type="text" value="100"/> %	<input type="text" value="220.00"/>		<input type="checkbox"/>
29	123	92526		Individual ST - 30 mins	220.00	220.00	<input type="text" value="100"/> %	<input type="text" value="220.00"/>		<input type="checkbox"/>
29	470	92507		Individual ST - 30 mins	220.00	220.00	<input type="text" value="100"/> %	<input type="text" value="220.00"/>		<input type="checkbox"/>
29	470	92526		Individual ST - 30 mins	220.00	220.00	<input type="text" value="100"/> %	<input type="text" value="220.00"/>		<input type="checkbox"/>
34	294	92507		Individual ST - 30 mins	220.00	220.00	<input type="text" value="100"/> %	<input type="text" value="220.00"/>		<input type="checkbox"/>
34	294	92526		Individual ST - 30 mins	220.00	220.00	<input type="text" value="100"/> %	<input type="text" value="220.00"/>		<input type="checkbox"/>

Save

From the above screen by default the write-off percentage will be 100%.

You can decide the write off by changing the percentage (will change the write-off amount accordingly) or changing the write off amount (will change the write off percentage accordingly) as below.

You can also write off the entire amount by clicking on the check box at the right on each encounter line.

X

Write off reason: Courtesy Adjustments ▼

Pid	Encounter	Code	Modifier	Visit Category	Fee	Balance	Write Off Percentage	Write Off Amount	Notes	Write Off Ent.Amt.
3	591	97530		Individual OT - 30 mins	195.00	195.00	<input type="text" value="92.31"/> %	<input type="text" value="180.00"/>	<input type="text"/>	<input type="checkbox"/>
29	123	92507		Individual ST - 30 mins	220.00	220.00	<input type="text" value="50.00"/> %	<input type="text" value="110.00"/>	<input type="text"/>	<input type="checkbox"/>
29	123	92526		Individual ST - 30 mins	220.00	220.00	<input type="text" value="45.45"/> %	<input type="text" value="99.99"/>	<input type="text"/>	<input type="checkbox"/>
29	470	92507		Individual ST - 30 mins	220.00	220.00	<input type="text" value="20.00"/> %	<input type="text" value="44.00"/>	<input type="text"/>	<input type="checkbox"/>
29	470	92526		Individual ST - 30 mins	220.00	220.00	<input type="text" value="100"/> %	<input type="text" value="220.00"/>	<input type="text"/>	<input type="checkbox"/>
34	294	92507		Individual ST - 30 mins	220.00	220.00	<input type="text" value="100"/> %	<input type="text" value="220.00"/>	<input type="text"/>	<input type="checkbox"/>
34	294	92526		Individual ST - 30 mins	220.00	220.00	<input type="text" value="100"/> %	<input type="text" value="220.00"/>	<input type="text"/>	<input type="checkbox"/>

Save

After mentioning the correct write off percentage or write off amount click on “Save” to complete the process.