

Forwarding Balance

Bring up the patient in "Patient Activity"

File Reports Billing Patients Appointments Clinical Documents Communications Tables Tools

PatientActivity

Account: **10004** Patient: **Na Test**

Cover Page Patient Info Responsible Party Insurance Plans Account Ledger Documents

Patient Info		Age: 61	Sex: F	Responsible Party	
First Name:	Gina	Date of Birth:	01/02/56	First Name:	Gina
Last Name:	Test	Last Visit:	01/30/17	Last Name:	Test
Address:	1 Main St	Next Visit:		Home Phone:	125-5555
cont'd:		Provider:	1	Work Phone:	
City:	Flowood	Category:	Regular	Relation:	Self
State:	MS	Ref Phys:		Billing Status:	Regular
Zip Code:	39232	Auth #:		Pat Balance:	0.00
Home Phone:	601 125-5555			Ins Balance:	0.00
Work Phone:	601 -				

Plan	Insured Party	ID
Blue Cross Blue SI	Gina Test	
John Giddens Law	Gina Test	

Patient Notes

Charge **Payments** **Walk-Out** **Apptmnt** **Exit**

Click the "Charge" button, which will bring up the "Select Claim" window

PatientActivity

Account: Patient: **Na Test**

Cover Page | **Patient Info** | **Responsible Party** | **Insurance Plans** | **Account Ledger** | **Documents**

Patient Info: First Name: Last Name: Address: cont'd: City: State: Zip Code: Home Phone: Work Phone:


Age: **61** Sex: **F** Date of Birth: **01/02/56** Last Visit: **01/30/17** Next Visit:

Responsible Party: First Name: Last Name: Home Phone:

Plan: **Blue Cross Blue Sl** Insured Party: **Gina Test**
John Giddens Law **Gina Test**

Select Claim

Date	Claim #	Prv	Ins	Billed	Ins Bal	Pat Bal	Balance
//	100166	1	1		0.00	0.00	0.00
//	100145	1	1		0.00	0.00	0.00
//	100080	1	7		0.00	0.00	0.00
//	100007	1	8	09/17/16	0.00	0.00	0.00



Click the "New Claim" button

PatientActivity

Account: Patient: **Na Test**

Cover Page | **Patient Info** | **Responsible Party** | **Insurance Plans** | **Account Ledger** | **Documents**

Patient Info

First Name:
Last Name:
Address:
cont'd:
City:
State: Zip Code:
Home Phone:
Work Phone:

Age: **61** Sex: **F**
Date of Birth: **01/02/56**
Last Visit: **01/30/17**
Next Visit:

Responsible Party

First Name:
Last Name:
Home Phone:

Plan: **Blue Cross Blue Sl** Insured Party: **Gina Test**
John Giddens Law **Gina Test**

Select Claim

Date	Claim #	Prv	Ins	Billed	Ins Bal	Pat Bal	Balance
//	100166	1	1		0.00	0.00	0.00
//	100145	1	1		0.00	0.00	0.00
//	100080	1	7		0.00	0.00	0.00
//	100007	1	8	09/17/16	0.00	0.00	0.00

System will pop up a message: Click the "Yes" button.

ie Reports Billing Patients Appointments Clinical Documents Communications Tables Tools

PatientActivity

Account: 10004 Patient: Na Test

Cover Page Patient Info Responsible Party Insurance Plans Account Ledger Documents

Patient Info		Responsible Party	
First Name:	Gina	First Name:	Gina
Last Name:	Test	Last Name:	Test
Address:	1 Main St	Home Phone:	125-5555
cont'd:		Work Phone:	
City:	Flowood	Relation:	Self
State:	MS Zip Code: 39232	Billing Status:	Regular
Home Phone:	601 125-5555	Pat Balance:	0.00
Work Phone:	601 -	Ins Bal:	0.00

Age: 61 Sex: F
Date of Birth: 01/02/56
Last Visit: 01/30/17
Next Visit:
Provider: 1
Category: Regular
Ref Phys:
Auth #:

Plan	Insured Party	ID
Blue Cross Blue SI	Gina Test	
John Giddens Law	Gina Test	

Electronic Encounter

No claim data could be retrieved from the electronic encounter.
Do you want to continue?

Yes No

Charge Payments Walk-Out Apptmnt Exit

The Claim Diagnosis box will come up. There is no need to enter any diagnosis, as you are only entering the patient balance.

The screenshot shows the MedPointe software interface. A 'Claim Diagnoses' dialog box is open, displaying '(No diagnoses on file)'. The dialog box has buttons for 'Add ICD-10', 'Add ICD-9', 'Delete Dx', 'Cancel', and 'Save'. The 'Save' button is highlighted with a red box. In the background, a patient record for Gina Test is visible, including fields for Last Name, Address, City, State, Zip Code, Home Phone, Work Phone, Date of Birth, Last Visit, Next Visit, Provider, Category, Ref Phys, Auth #, Home Phone, Work Phone, Relation, Billing Status, Pat Balance, and Ins Balance. The 'Save' button in the dialog box is highlighted with a red box.

Click "Save"

Next window that comes up is the "Claim Information" box. Since this is a patient balance, you want to change any insurance listed to "None", as you are not billing any insurance.

First Name: Gina
Last Name: T. si

Claim Information

Home Ph
Work Ph
Relat
Billing Sta
Pat Balar
Ins Balar
Patie

Diagnosis

a)
b)
c)

Edit

Insurance

Primary: Blue Cross Blue Sheild
Secondary: Blue Cross Blue Sheild
John Giddens Law Firm
Tertiary: None

Providers

Rendering Prv: Michele Gains, MD
Supervising Prv: Michele Gains, MD

Save Cancel

ppmnt

Once all insurance lines say "None", click "Save"

First Name: Gina
Last Name: Test
Home Phn
Work Phn
Relat
Billing Sta
Pat Balan
Ins Balan
Patie

Claim Information

Diagnosis

a)
b)
c)

Edit

Insurance

Primary: None
Secondary: None
Tertiary: None

Providers

Rendering Prv: Michele Gains, MD
Supervising Prv: Michele Gains, MD

Save Cancel

Apptmnt

Enter the date the balance is from; enter the code "BF", Balance Forward, under code.

Patient Info: First Name: Gina, Last Name: Test, Address: 1 Main St, City: Flowwood, State: MS, Zip Code: 39232, Home Phone: 601-125-5555, Work Phone: 601-125-5555. Age: 61, Sex: F, Date of Birth: 01/02/56, Last Visit: 01/30/17, Next Visit: , Provider: 1, Category: Regular.

Responsible Party: First Name: Gina, Last Name: Test, Home Phone: 125-5555, Work Phone: , Relation: Self.

Transaction Entry: Date(s): 02/03/17, Provider: Michele Gains, MD, Claim Info, Assigned.

Code:	Mod:	Description:	Units:	Amount:
			1	

Buttons: Charge, Payments, Walk-Out, Apptmnt, Exit.

Enter the dollar amount owed, under "Amount"

Patient Info: First Name: Gina, Last Name: Test, Address: 1 Main St, City: Flowwood, State: MS, Zip Code: 39232, Home Phone: 601-125-5555, Work Phone: 601-125-5555. Age: 61, Sex: F, Date of Birth: 01/02/56, Last Visit: 01/30/17, Next Visit: , Provider: 1, Category: Regular.

Responsible Party: First Name: Gina, Last Name: Test, Home Phone: 125-5555, Work Phone: , Relation: Self.

Transaction Entry: Date(s): 11/04/16, Provider: Michele Gains, MD, Claim Info, Assigned.

Code:	Mod:	Description:	Units:	Amount:
BF		Balance Forward from Old System	1	80.00

Buttons: Charge, Payments, Walk-Out, Apptmnt, Exit.

Click "Save".

The entry is complete and you can see the description and dollar amount owed in the "Claim Data" window. Then click "Exit"

The screenshot shows a software interface with a patient information form and a 'Claim Data' window. The patient information includes Name: Gina, Date of Birth: 01/02/56, First Name: Gina, Last Name: Test, Address: 1 Main St, Home Phone: 125-5555, and Insurance: 601. The 'Claim Data' window displays the following information:

Account #: 10004 Gina Test Claim #: 100172
Pat Bal: 80.00 Pat Bal: 80.00
Ins Bal: 0.00 Ins Bal: 0.00

Date	Prv	Proc	Mod	Description	Diag	Units	Amount	Ins
11/04/16	1	BF		Balance Forward from Old System		1.00	80.00	

Buttons: Add, Delete, Exit (highlighted), Adjustments (Ins Write-Off, Courtesy, Discount, Bill Pat, Transfer, Co-Payment, Apply Credit, Bill Ins), Add, Delete.

When you click exit, the "Patient Payments" window will come up, asking if you want to post the patient payment. Since you are transferring balances, and are not posting a payment, you will choose "Cancel".

PatientActivity

Account: 10004 Patient: Na Test

Cover Page Patient Info Responsible Party Insurance Plans Account Ledger Documents

Patient Payments

Account #: 10004 Patient: Gina Test

First Name: C Last Name: T Address: 1 cont'd: City: F State: M Home Phone: 6 Work Phone: 6

Plan: Blue Cross Blue John Giddens I

Responsible Party: Gina Test 125-5555

Claim Information: Date: 11/04/16 Claim #: 100172 Pat Balance: 80.00

Previous Balance: 80.00 Today's Charges: 0.00 Patient Balance Due: 80.00

Patient Balance: 80.00 Insurance Balance: 0.00

Courtesy Discount

Date: 11/04/16 Method: Cash Check #: Amount: 80.00

Save Cancel

Charge

Description	Diag	Units	Amount	Ins
om Old System		1.00	80.00	

Add Delete Exit

Adjustments: Ins Write-Off Courtesy Discount Bill Pat Transfer Co-Payment Apply Credit Bill Ins

Claim #: 100172 Pat Bal: 80.00 Ins Bal: 0.00

Notes Visit Note

You will be taken back to the patients "Patient Activity" where it will show you, in red, what the patient owes. Your task is complete.

Account: 10004

Patient: Na Test

Cover Page Patient Info Responsible Party Insurance Plans Account Ledger Documents

Patient Info

First Name: Gina
Last Name: Test
Address: 1 Main St
cont'd:
City: Flowood
State: MS Zip Code: 39232
Home Phone: 601 125-5555
Work Phone: 601 -

Age: 61 Sex: F
Date of Birth: 01/02/56
Last Visit: 01/30/17
Next Visit:
Provider: 1
Category: Regular
Ref Phys:
Auth #

Responsible Party

First Name: Gina
Last Name: Test
Home Phone: 125-5555
Work Phone:
Relation: Self
Billing Status: Regular
Pat Balance: 80.00
Ins Balance: 0.00

Plan	Insured Party	ID
Blue Cross Blue SI	Gina Test	
John Giddens Law	Gina Test	

Patient Notes

Charge Payments Walk-Out Apptmnt Exit