

Transfer credit from patient to linked patient

1. Go to invoice that contains credit

Overall Balance Patient: \$39.10
Insurance: \$14,663.00

Invoice # 11534

Bill Code	CPT	Description	Emp	Insurance	Amount	Diag	Disc	Insur	Patient
frame		frame sale LPC 781741431765 Fe...			200.00		0.00	0.00	200.00
01/16/2019		Patient - Cash Payment			-300.00		0.00	0.00	-300.00

2. Click Edit Invoice, then Credit Transfer

Bill Code	Proc Code	MC	Description	Qty	Emp	Insurance	Amount
Add loca...			Addition location				-1000...
Add Loc...			Addition Location - TX				-1000...

3. Click checkbox for "Display Linked Accounts"

Date	Invoice	Patient	Ins Bal	Pt Bal	Loc ID	Transfer Amount
05/02/2016	4410	test, kraig	0.00	336.00	1	0.00
05/05/2016	4486	test, kraig	0.00	165.00	1	0.00
05/24/2017	8125	test, kraig	18.00	-1,020.00	1	0.00
08/02/2016	5266	test, kraig	0.00	5.00	1	0.00
08/02/2016	5267	test, kraig	0.00	199.00	1	0.00
09/27/2018	11533	test, kraig	0.00	15.00	1	0.00
10/01/2015	3553	test, kraig	500.00	-100.00	1	0.00
10/26/2016	6062	test, kraig	0.00	-1,082.50	1	0.00
11/18/2015	3653	test, kraig	2,750.00	1,200.00	1	0.00
11/27/2015	3657	test, kraig	150.00	24.95	1	0.00
12/19/2017	10729	test, kraig	0.00	90.00	1	0.00
12/19/2017	10730	test, kraig	0.00	145.00	1	0.00
12/30/2015	3675	test, kraig	0.00	160.00	1	0.00

4. This will allow you to see all invoices for patients with linked accounts.

Date	Invoice	Patient	Ins Bal	Pt Bal	Loc ID	Transfer Amount
05/02/2016	4410	test, kraig	0.00	336.00	1	0.00
05/05/2016	4486	test, kraig	0.00	165.00	1	0.00
05/24/2017	8125	test, kraig	18.00	-1,020.00	1	0.00
05/31/2018	11505	*Test, Amanda	0.00	-962.50	1	0.00
05/31/2018	11506	*Test, Amanda	0.00	1,045.50	1	0.00
06/01/2017	8204	*Richter, Jessica	0.00	5,912.50	1	0.00
07/06/2018	11513	*Test, Amanda	0.00	50.00	1	0.00
08/02/2016	5266	test, kraig	0.00	5.00	1	0.00
08/02/2016	5267	test, kraig	0.00	199.00	1	0.00
09/27/2018	11533	test, kraig	0.00	15.00	1	0.00
10/01/2015	3553	test, kraig	500.00	-100.00	1	0.00
10/03/2017	9664	*Test, Amanda	11.00	-41.00	1	0.00
10/26/2016	6062	test, kraig	0.00	-1,082.50	1	0.00
11/18/2015	3653	test, kraig	2,750.00	1,200.00	1	0.00

5. Under the Transfer Amount column for the invoice(s) with a balance, enter the amount you wish to transfer to the invoice. You can add amounts in multiple rows. When complete, simply click Apply.
 - a. Auto Transfer will simply add the credit to the invoice at the top of the list.