

# How do I...

## Apply an Overpayment?

You will need to note the invoice that has the credit and the invoice to which you want to apply this.

### **When the invoice has a credit on the insurance side of the invoice**

*It doesn't matter if the original payment(s) were patient payments (co-pays or deductibles) or insurance payments. You will be doing the refund to the **insurance** side of the invoice.*

Select payment type 18, Refund Insurance.

In the memo/reference field, indicate the invoice to which this credit is being applied. If this will be applied to multiple invoices, put in the invoice numbers to which the credit is applied.

Go to the invoice which will receive the credit.

Select 10, Apply Credit Insurance, if you will be applying this to the insurance side of the invoice. This includes payments patients would make such as co-payments and deductibles.

Select 13, Apply Credit Patient, **only** if you will be applying this to the patient side of the invoice. **Do not use** if you are entering a co-payment or deductible.

If will be using this credit to clear out a Patient Responsible (payment type 1), delete the Patient Responsible line (you do not need to be on the Administer Screen for this). You will be using payment type 10 because this will be going against the **insurance** side of the invoice.

In the memo/reference field, indicate the invoice from which this credit is originated.

### **When the invoice has a credit on the patient side of the invoice**

*Only use this when the credit is on the patient side of the invoice. **Do not use** for patient payments against the insurance side of the invoice.*

Select payment type 19, Refund Patient.

In the memo/reference field, indicate the invoice to which this credit is being applied. If this will be applied to multiple invoices, put in the invoice numbers to which the credit is applied.

Go to the invoice which will receive the credit.

Select 13, Apply Credit Patient, **only** if you will be applying this to the patient side of the invoice. **Do not use** if you are entering a co-payment or deductible.

Select 10, Apply Credit Insurance, if you will be applying this to the insurance side of the invoice. This includes payments patients would make such as co-payments and deductibles.

If will be using this credit to clear out a Patient Responsible (payment type 1), delete the Patient Responsible line (you do not need to be on the Administer Screen for this). You will be using payment type 10 because this will be going against the **insurance** side of the invoice.

In the memo/reference field, indicate the invoice from which this credit is originated.