



More Splits: Entering credits when you have received a larger than expected payment

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In some situations, you might discover that there are no outstanding charge splits or charge splits with balances that are too low for the payor from whom you have received a payment. It may occur when you have all the charge assigned to the patient and receive a payment from an insurance carrier. Or, you might have split a certain amount to the carrier, but the carrier is paying more than you expected them to pay. The way to handle both these situations is to use the More Splits feature on the Credit entry screen.

1. If the Daysheet is open, select the Credits tab and click the Add (green plus) icon.
2. Alternatively, if the Daysheet is not already open, click the Add Credit (hand with money) icon on the main menu toolbar.
3. Using <F2> or the right mouse button, pop up the list of Active Patients. Highlight your patient's name. Press <ALT>-S or click the Select icon (hand) to choose the patient.
4. The system automatically enters today's date or the current working date. Change that if necessary.
5. Tab to the Payor field and press the down arrow or left click in the Payor field to show the list of payors for this patient. Select the payor from whom this payment was received, and tab to the next field.
6. It does not matter if no open charge splits for this payor appear. Select your payment type in the Credit Type field. If you choose New Check, OM will ask you for the check details. If you already entered the check, select Check instead and select the appropriate check from the list. If the payment is cash or a credit card, select the credit type as you normally would.
7. At this point, you would select the open charge split in the Outstanding window on the lower left, but in this case, either the open split will have a balance that is less than the payment amount, or there won't be a split for the desired charge at all. If no split for this service is present, skip to the next step.
8. If there is a split for part of the amount you want to pay, go ahead and apply your payment to it. Note the payment amount remaining for this charge that you were unable to apply.
9. For example, let's say that you receive a \$75 payment for a particular service, but the only split for that service appearing in the Outstanding window has a balance of \$50. You would apply \$50 of the payment to the open split and note that you still have \$25 to be applied.
10. Now click the yellow More Splits (file drawer) icon under the Outstanding box or type <ALT>-S. A window entitled "Creating Outstanding Charge(s) for <your payor>" will open, showing all the splits, regardless of the payor. If there are no charge splits listed in the window, check the range of dates and be sure they match the range of dates on your explanation of benefits (EOB). Highlight the desired split for the date of service to which you want to apply the payment. ***It does not matter whether or not there is an open balance on the item!***
11. Now enter the amount you want to transfer to the payor from whom you have received payment.
12. (OPTIONAL) If the payment for this credit entry covers more than one service and other transfers will be necessary, you can select other charge splits and enter amounts to be transferred from them. Doing more than one More Splits transfer at once is more efficient, but not necessary. If you find you have to do additional transfers for this

payment after returning to the Credit form, you can click More Splits as many times as necessary.

13. Once you have specified all the transfers you want to do in the More Splits window, you will see the amounts that OM will transfer in the right-most column. Click the OK (blue check) button, or press <AL T>-O to execute the transfers and return to the Credit form.
14. Now apply the payment in the usual manner and save the Credit entry.

Some things you should know about More Splits:

- If necessary, to complete your requested transfer, OM will unapply payments made by the other payor. For example, if you transfer \$50 from a patient charge split that has an open balance of \$25, OM will first unapply \$25 of the patient's previous payment, resulting in a \$25 prepay (unapplied payment) for the patient.
- As soon as you click **OK** on the More Splits window, the transfers you have requested will be executed. **If** you then cancel the payment entry, the transfers will not be removed. You will see them in the current Daysheet. **If** you want to delete them, you can, but any amounts that OM has unapplied will remain unapplied.
- If** you have received a check from one payor for multiple patients, see Document #466.