Entering Adjustments (Limited to Users with rights ONLY)

This outlines the process of entering an adjusting entry to the patient's ledger. If you are adjusting a payment, this must be done in the Payment tab via a right click option on the payment. The Adjustment tab is for entering non-payment related adjustments such as write-offs.

1. With your patient selected, click on the Transactions icon on the opening screen.
2. Click on the Adjustment tab
3. Click on New to add today's date
   a. Code: 1) Click on the ellipses to choose the type of adjustment. 2) Double-clicking on the chosen code will fill in the fields and close the window, Full Refund Full window to fully refund the payment funds to the patient
   b. Description: Filled in automatically when the code is selected
   c. Apply to Current Payment Plan: Click here to apply to payment plan
   d. Affect Bank Deposit: Will be filled in automatically if appropriate when code is selected
   e. Amount: Enter appropriate amount
4. Press the Add button.
5. Press Apply button to apply the adjustment to the patient’s charges.
6. The Applying Adjustment window will appear. An adjustment should always be applied to the corresponding charge or payment
7. Select the charges in the lower list to apply the adjustment to and press the “Apply” button
8. Once done, press the “OK” button.
Editing/deleting Adjustments

1. Select the adjustment in the lower list to be changed by pressing the left mouse down on the adjustment line to be changed.
2. Right-click on the selected line and select *Disbursement*. The *Allocated Adjustments* dialog will appear.
3. Press the *Unallocate* button to unallocate the adjustment from any charges.
4. Press the *Close* button.
5. To edit the adjustment, make the necessary changes and press the *Modify* button.
6. Then, press the *Apply* button to apply the adjustment to the patient’s charges.
7. To delete the adjustment, press the *Delete* button.
8. If you select “NSF Payment”, “Refund Payment”, “Full Refund”, or “Reverse Payment”, then the “Payment Adjustment” window will appear. Fill in the necessary information.
9. Press the *OK* button.

To Reverse Payment

1. Highlight incorrect transaction line in payment ledger
2. Right click on mouse
3. Select ‘reverse payment’
4. Click ‘code’
5. Scroll down list and double click ‘PR’ – Reverse Payment
6. Notice in section ‘affect bank deposit’ by default will have the box checked
7. Your bank will be defaulted
8. Click ‘okay’ and retrieve receipt from patient