

Search for Patient Balances

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1. Select **Patient > A/R Control**.

2. Enter your Search Criteria or Load a Search Filter.

1. **Patient Balance:** **Select a search parameter from the drop-down menu, then enter a balance amount to refine your search.

2. **Date Search Options:** Select whether you want to search by days or by dates.

1. Populate the applicable filter(s) from the drop-down menu and the number of days or dates for the filter(s).

3. **Claim Search Options:**

1. **Payer:** Select the Payer(s) you would like to filter your results by. The search results will return patients with one or more charges that are currently at the specified payer(s).

2. **Charge Balance:** Select a search parameter from the drop-down menu, then enter a charge balance amount to refine your search.

3. **Charge Status:** Filter your results further by selecting specific Charge Statuses from the drop-down menu.

4. **Rendering Provider:** Select the Provider(s) you would like to filter your results for. The search results will return patients with one or more charges currently under the specified provider(s).

5. **Referring Provider:** Select the Referring Provider(s) you would like to filter your results for. The search results will return patients with one or more charges currently under the specified referring provider(s).

4. **Paper Statements Sent:** Use the drop-down menu to refine your results based on the last time a paper statement was sent to a patient.

5. **Electronic Statements Sent:** Use the drop-down menu to refine your results based on the last time an electronic statement was sent to a patient.

6. **Total Statements Sent:** Select a search parameter from the drop-down menu, then enter the number of total statements (paper/electronic) sent to refine your search.

7. **Patient:** Refine your search for a specific patient.


8. **Account Types:** Select the patient account type(s) you would like to refine your search by.

9. **Set to send Statement:** Filter your search by patients that are set to "send statement."

10. **Send to Send FDN:** Filter your search by patients that are set to "send an FDN."
11. **Payment Portal Status:** Use the drop-down menu to refine your results based on the status of the payment portal invitation sent to a patient (Not sent, Sent but Not Registered, Registered).

3. Click  .

4. **Optional:** Click the  icon to edit your search criteria.

 Sort your search results. Visit our [Reorder Table Columns Help Article](#) for detailed steps on how to hide, rearrange or add header columns.

5. You are able to interact with the search results by right-clicking on a row.

1. **Copy:** Copies the patient's information to your clipboard
2. **Open Patient:** Opens the selected patient's record within the patient screen.
3. **View Patient Activity:** View the selected patient's Activity Listing.
4. **Show Statement History:** Shows a list of all statements associated with this patient.

6. In the **Charges** column, click on the **View/Edit link** to review the charge detail(s) that are associated with the **Charge Status** selected.

7. Place a checkmark next to the patient(s) you want to include in a specific batch action.

8. Click  and choose an action from the drop-down menu.

1. **Assign for Statement Processing:** Changes the status of charges that are set to Pending Patient to Due Patient at a batch level to allow for future statement processing. This action also sets the patient's "Send Statement" option.
2. **Assign for FDN:** Updates the selected patients for FDN processing.
3. **Assign to Collections:** Assign multiple charges and patients to collections.
4. **Assign to Pending Patient:** Updates the status of charges that are set to Balance Due Patient to Pending Patient to prevent future statements from processing.
5. **Write-Off Remaining Balance:** Writes off the remaining balance of a selected charge that is set to Due Patient or Collections.
6. **Debit Account:** Adds fees or surcharges to the selected patients.

9. Click **Submit Batch**.

 Reference the **Batch Actions Help Article** for steps related to a specific action.
