View a Patient's Account Summary

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The Account Summary window contains important information related to this patient. Use the information here to quickly identify any action items pertaining to this patient.

1. Select **Patient** > **Patient**.
2. Use the **Search** field to search through your patients.

   > Place a check in the "***Include inactive patients***" box to include inactive patients in your search results.

3. Select the **Patient**.
4. Click on the **Account Summary** from the side panel to expand the account summary section.
   1. **Family Account Type:** Displays if the patient is set up as a Family Account (Master or Dependent) or as an individual Account (Regular). Master will have a "List Dependents" link that displays all dependents associated with the family account.
   2. **Patient Balance**: Displays the amount the patient is required to pay after accounting for any patient credits. This field only represents open charges set to the status of Paid, Balance due Patient, and Pending Patient.
   3. **Last Patient Payment**: Displays the last payment date and amount made by the patient.
   4. **Insurance Balance**: Displays the amount the insurance is required to pay after accounting for any insurance credits.
   5. **Last Insurance Payment**: Displays the last payment date and amount made by the insurance.
   6. **Collections Balance:** Displays the amount of charges that have been sent to a collections agency
   7. **Last Statement**: Displays the last statement mailed date and amount.
   8. **Statement Mailed Count**: Displays the number of statements that have been mailed to the patient. When all Patient balances are satisfied by a payment or adjustment, the counter will reset to zero (0).
   9. **Electronic Statement Count**: Displays the number of electronic statements that have been sent to the patient. When all Patient balances are satisfied by a payment or adjustment, the counter will reset to zero (0).

      > You can also reset the *Statements Sent count* to 0 whenever a new claim is set to Balance

> Due Patient by turning on the corresponding Patient Setting for Customer. For more information, visit our Configure Patient Settings for Customer Help Article.

10. **Last Visit**: This field will display the last Date of Service (DOS) for the patient.

11. **Next Appointment**: Displays the patient's next appointment date. In order to have a date populate within this field, the patient must have a future appointment scheduled within the Appointment Scheduler.

12. **Follow-Up Date**: Enter a date in which you would like to follow up with this patient. This field can be used in conjunction with the Patient Follow-up Report.

13. **Recall Date**: Use this field to enter a Recall Date which is commonly used to identify patients who should return for a routine appointment. This field can be used in conjunction with the Patient Recall Report.

5. Click **Save**.
