Apply Account Credit to a Claim

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Who can use this feature?

Users with the Patient Payment permission can post patient payments within the Claim section.

Follow the steps below to apply a credit.

1. Select **Claim** > **Claim**.
2. Use the **Search** field to search for your claim.

   Place a check in the ***"Show exact matches only"*** box to search for exact matches or ***"Show unpaid claims only"*** to show claims that may need follow-up.

3. Open the claim.
4. Click on the **Payment** tab from the side panel.
5. From the Claim Payment tab, fill in the radio button for **Apply Account Credit to Claim**.
   1. The Credit Available will display.
   2. Populate the **Applied Amount** field with the amount of credit to apply.
   3. Select the **Received Date**.
   4. The **Memo** field is defaulted to Apply Account Credit. If necessary, update the memo per your business needs.
6. Click **Save**.