

Auto WriteOff



Auto WriteOff allows users to apply a patient credit across many patient accounts for specified parameters.

eTHOMAS Auto
WriteOff

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Auto WriteOff Introduction

Auto WriteOff has been designed to allow users to write off patient balances in bulk (due to patient in collections, deceased, hardship, etc.). The Auto WriteOff feature uses a patient credit with an adjustment code that you choose. This could ultimately save your office the time of having to go into each patient account separately.

Accessing and Generating Accounts with Auto WriteOff

Access the Auto WriteOff module through Billing | Auto WriteOff.

The screenshot shows the eTHOMAS software interface for the Auto WriteOff module. The window title is "THOMAS" and the menu bar includes Patient, Code Files, Billing, Reports, Appointments, Route Slips, Utility, Help, and Messaging. The "Billing" menu is open, showing "Auto WriteOff" as the selected option. The main area displays the "Auto WriteOff" form with the following fields and values:

- Balance from: 1.00 to 15.00
- Greater than Days: 1
- No Pay Days: 30
- Adjustment Code: FH - FINANCIAL HARDSHIP
- Message: (empty)
- Collections: NO
- Only 0 Insurance Balance: (unchecked)
- Send to Collection: (unchecked)

A "Write Off" button is located at the bottom of the form.

Configure the Auto WriteOff screen to the specifications desired using the following fields:

Balance from / to:	The dollar amount of the Patient Cash Balance from (minimum) and to (maximum) to generate for Auto WriteOff.
Greater than Days:	The minimum number of days old of the patient balance.
No Pay Days:	Defaults to 30, the minimum number of days since the patient's last payment. To generate accounts regardless of the payment made, enter zero.
Adjustment Code:	Select an adjustment code to classify the patient credit. Leave blank to not report an adjustment code.
Message:	Type a message to appear on the patient credit.
Collections:	No=include patients that do not have collections checked; Yes=include patients that have collection checked; Both=include patients with collections and without collections checked.
Only 0 Insurance Balance:	Include only patients with a zero Insurance Balance.
Send to Collection:	Check the Collection box within the Patient Information after writing off the patient's balance.

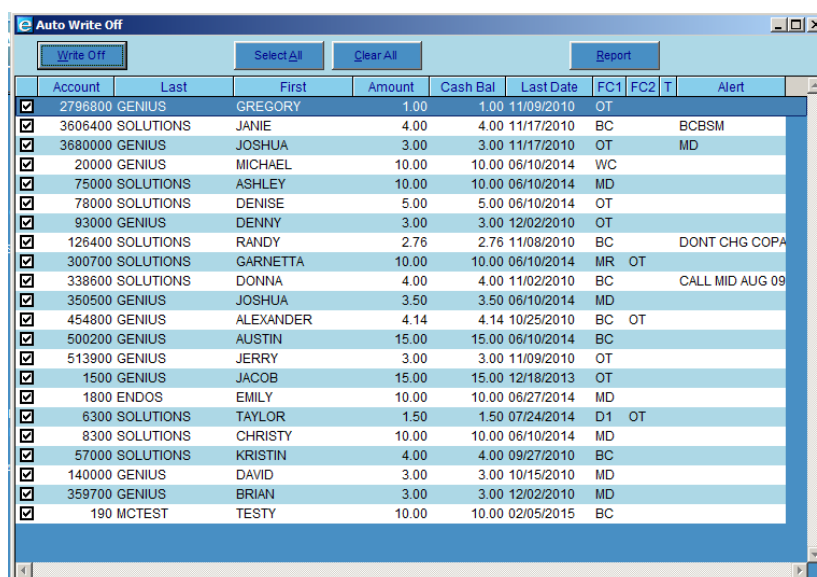
By default, the system will calculate the days old based on the last activity on the patient ledger. There is a System Setting **UseOldDateWo** that works in conjunction with the Greater than Days. If activated, the system will calculate the days using the oldest transaction with a balance on it within the Patient's Transaction Ledger.

Adjustment Codes

An appropriate code may already exist or you may wish to create a new one for Auto WriteOff purposes. To create an Adjustment Code to use for the Auto WriteOff, access the Adjustment Codes from Code Files | Procedure | Adjustments. Create an Adjustment Code by clicking on the Plus sign to add. The Adjustment Codes may be used when creating Insurance or Patient Credit and Debits as well as within the Auto WriteOff module, as that creates a Patient Credit. Creating Adjustment Codes can be useful for reporting purposes as an Adjustment Code report may be generated to view the various adjustments applied. Additionally, Adjustment Codes serve a purpose of good record keeping on the patient account as to why a balance was written off.

Write Off Accounts

Once the system generates the accounts to write off, the user will be brought into the Auto WriteOff screen. From here, accounts may be written off or a report may be generated. It may be helpful to use the Patient Tear Off to view the patient account in more detail or you may wish to generate a report of the accounts and go through specific accounts before writing off balances. The Auto WriteOff module offers a great deal of flexibility for the user.



Account	Last	First	Amount	Cash Bal	Last Date	FC1	FC2	T	Alert
<input checked="" type="checkbox"/>	2796800	GENIUS	GREGORY	1.00	1.00	11/09/2010	OT		
<input checked="" type="checkbox"/>	3606400	SOLUTIONS	JANIE	4.00	4.00	11/17/2010	BC		BCBSM
<input checked="" type="checkbox"/>	3680000	GENIUS	JOSHUA	3.00	3.00	11/17/2010	OT		MD
<input checked="" type="checkbox"/>	20000	GENIUS	MICHAEL	10.00	10.00	06/10/2014	WC		
<input checked="" type="checkbox"/>	75000	SOLUTIONS	ASHLEY	10.00	10.00	06/10/2014	MD		
<input checked="" type="checkbox"/>	78000	SOLUTIONS	DENISE	5.00	5.00	06/10/2014	OT		
<input checked="" type="checkbox"/>	93000	GENIUS	DENNY	3.00	3.00	12/02/2010	OT		
<input checked="" type="checkbox"/>	126400	SOLUTIONS	RANDY	2.76	2.76	11/08/2010	BC		DONT CHG COPA
<input checked="" type="checkbox"/>	300700	SOLUTIONS	GARNETTA	10.00	10.00	06/10/2014	MR	OT	
<input checked="" type="checkbox"/>	338600	SOLUTIONS	DONNA	4.00	4.00	11/02/2010	BC		CALL MID AUG 09
<input checked="" type="checkbox"/>	350500	GENIUS	JOSHUA	3.50	3.50	06/10/2014	MD		
<input checked="" type="checkbox"/>	454800	GENIUS	ALEXANDER	4.14	4.14	10/25/2010	BC	OT	
<input checked="" type="checkbox"/>	500200	GENIUS	AUSTIN	15.00	15.00	06/10/2014	BC		
<input checked="" type="checkbox"/>	513900	GENIUS	JERRY	3.00	3.00	11/09/2010	OT		
<input checked="" type="checkbox"/>	1500	GENIUS	JACOB	15.00	15.00	12/18/2013	OT		
<input checked="" type="checkbox"/>	1800	ENDOS	EMILY	10.00	10.00	06/27/2014	MD		
<input checked="" type="checkbox"/>	6300	SOLUTIONS	TAYLOR	1.50	1.50	07/24/2014	D1	OT	
<input checked="" type="checkbox"/>	8300	SOLUTIONS	CHRISTY	10.00	10.00	06/10/2014	MD		
<input checked="" type="checkbox"/>	57000	SOLUTIONS	KRISTIN	4.00	4.00	09/27/2010	BC		
<input checked="" type="checkbox"/>	140000	GENIUS	DAVID	3.00	3.00	10/15/2010	MD		
<input checked="" type="checkbox"/>	359700	GENIUS	BRIAN	3.00	3.00	12/02/2010	MD		
<input checked="" type="checkbox"/>	190	MCTEST	TESTY	10.00	10.00	02/05/2015	BC		

Take the time to understand what each button does within the Auto WriteOff in order to make it work for you and save your office time.

Write Off:	Write Off will prompt you to write off the selected patient balances (those accounts checked)
Select All:	Select all accounts (they are all selected by default)
Clear All:	Clear all accounts from being checked
Report:	Generate a list of patient accounts

Using Patient Tear Off

The Patient Tear Off can be a useful tool to viewing patient information when in another module within eTHOMAS. To use the Patient Tear Off, press the Ctrl + Shift + P keys simultaneously on your keyboard. The Patient Tear Off will display a viewable Patient Screen where various portions of the Patient screen may be accessed.

THOMAS M 01 100550 - GENIUS SOLUTIONS

Patient | Code Files | Billing | Reports | Appointments | Route Slips | Utility | Help | Messaging

Patient Tear off

Acct. No. 20000 Case Search In Account

GENIUS, MICHAEL J
123 ANY STREET
ANYWHERE, MI 48158

Phone H:586-555-1212
W:
eMail

Birth 07/11/1980 (35 Years)
Social 333-33-3333
Pat. Type N/A

Last Visit 06/10/2014 First Visit 08/09/2004
Last XRay

Flag
Doctor 02 - CHRISTINA YANG

Alert
Notes

Other Dates

LAST EKG
MISC DATE 2
MISC DATE 3
MISC DATE 4
MISC DATE 5

Cash \$10.00 Insurance \$0.00

Ledger Referrals Medication Free Care Dates

Claims Route Slip Other Notes

Recall Multimedia Clinical Notes

Statement Stmt Notes Benefits Case Management

Policy Header Task History

Post Auto WriteOff

Once the balances have been written off, the Transaction Ledger of each account will have a Patient Credit (PATCRE) and the message that was placed on the account. Here is an example of an account that was written off.

Transaction Ledger 01 - 20000 GENIUS, MICHAEL

Cash: 0.00 Ins: 0.00

Search: Procedure Descending ☒ Show All

Date	Proc	Dr	Charge	Expect Ins	Ins Paid	Charge Pat	Pat Paid	Ins Bal	Cash Bal	Claim	Ref
06/10/2014	99213	01	50.00	40.00	40.00	10.00	0.00	0.00	0.00	1992	9479
06/10/2014	99213	01	50.00	50.00	50.00	0.00	0.00	0.00	0.00	1995	9482
10/01/2014	INSPAY-WC		40.00	0.00	40.00	0.00	0.00	0.00	0.00	1992	9964
10/01/2014	INSPAY-WC		50.00	0.00	50.00	0.00	0.00	0.00	0.00	1995	9965
03/09/2016	PATCRE		10.00	0.00	0.00	0.00	10.00	0.00	0.00	0	9966

Reference: OLD ACCOUNTS, NO PATIENT ACTIVITY, WRITING OFF

The advantage of using an Adjustment Code when using Auto WriteOff is that those accounts may be tracked via the specific Adjustment Code used. Access the Adjustment Code Report through Reports | Financial | Adjustment Code Report. Specify the parameters and select the specific Adjustment Code to only display those accounts with that Adjustment Code.

ADJUSTMENT CODE REPORT

User Name:

☐ Print Report Explanation

☒ Detail

Location:


Doctor Code:

Date From:

Date To:

☐ Use System Date

Adjustment Code:

 MS Excel

GENIUS SOLUTIONS

ADJUSTMENT CODE REPORT

Printed on 03/09/2016 Wednesday 09:48:41

Location System Summary Doctor System Summary Adjust Code OA List Detail Date From 03/09/2016 To 03/09/2016 Use Service Date

Code OA OLD ACCOUNTS

Loc	DR	Srv Date	Name / AcctNo	Cash			Insurance		
				Debit	Credit	NegPat	Debit	Credit	NegIns
01	01	03/09/2016	GENIUS, ALEXANDER - 454800	0.00	4.14	0.00	0.00	0.00	0.00
01	01	03/09/2016	GENIUS, JERRY D - 513900	0.00	3.00	0.00	0.00	0.00	0.00
01	01	03/09/2016	GENIUS, MICHAEL J - 20000	0.00	10.00	0.00	0.00	0.00	0.00
01	01	03/09/2016	SOLUTIONS, DONNA - 338600	0.00	4.00	0.00	0.00	0.00	0.00
01	01	03/09/2016	SOLUTIONS, KRISTI - 57000	0.00	4.00	0.00	0.00	0.00	0.00
01	01	03/09/2016	SOLUTIONS, RANDY - 126400	0.00	2.76	0.00	0.00	0.00	0.00
Adjustment Code OA Totals:				6	0.00	27.90	0.00	0.00	0.00
Grand Totals:				6	0.00	27.90	0.00	0.00	0.00