

From: ChARM Health Support support@charmhealth.com 
Subject: Re:[## 1114321 ##] ChARM EHR NewUI:: Family balance
Date: May 15, 2023 at 12:04
To: scottmfish@gmail.com
Cc: support@charmhealth.com

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Dear Scott,

As of now, provision is not available to apply "Unused Amount/Credit" from one family member to the Invoice of another family member. We have this requirement in our features list. We will let you know once it is available.

Please follow the below steps to apply the already collected payment amount to the family member

- Navigate to 'Billing > Receipts' section
- Click the action icon (3 dots icon) associated with the receipt and choose 'Payment Refund' option. This will open 'Payment Refund to :' window
- Choose 'Payment Method' as 'Card' and select 'Refund To' as 'Patient'
- Enter the amount you want to transfer in the 'Refund Amount' field and type in appropriate 'Comments'
- Click 'Payment Refund' button

Once it is done, create a new receipt for the required family member with the same amount so that you can be utilized against subsequent invoices of that member.

In the future, while collecting the payment itself, you can collect payment from the EOBs section and apply that payment to all the family members. Following are the steps

- Navigate to 'Billing > EOBs' section and click '+ EOB Details' button
- Select payment date under 'Check/EFT Date' and choose the 'Payment Method'
- Enter the 'Payment Amount' and choose 'Payment From' as 'Patient'
- Enter the 'Patient Name'. This will list all the outstanding invoices of that patient
- Select 'show outstanding invoices of linked patients' option so as to get the list of outstanding invoices of the members linked to him/her
- Select the required invoice(s) from the list and apply for the payment
- Click 'Add'

Also, you can go through the below URL for detailed information on our EOBs feature.
https://wiki.charmhealth.com/past-release-notes.html#EnhancementsinEOB_july112018

Feel free to write back to us if you have any further questions.

Regards,
Rohith Philips
Charm Support



----- On Sat, 13 May 2023 02:31:11 +0530 "scottmfish@gmail.com" <scottmfish@gmail.com> wrote -----

Category : Question

Browser Details :Mozilla/5.0 (Macintosh; Intel Mac OS X 10_15_7) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/112.0.0.0 Safari/537.36

Facility Name : Tulsa Family Psychiatry & Wellness User Name : Scott Fisher Reference : FPSY628-1102

Message :

When one of the members in a family has a credit, how can we apply that to another member of the family? This does not seem intuitive in Charm. Thanks