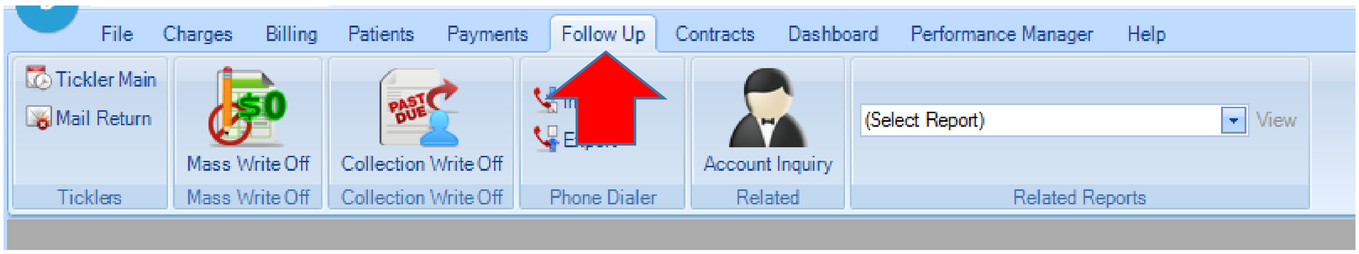
Imagine Training: Collecting Patient Balances

Due to high deductible insurance plans, it's increasingly important for practices to collect on patient balances at check-in. This handout will discuss the most efficient ways for staff to locate patient balances in Imagine .

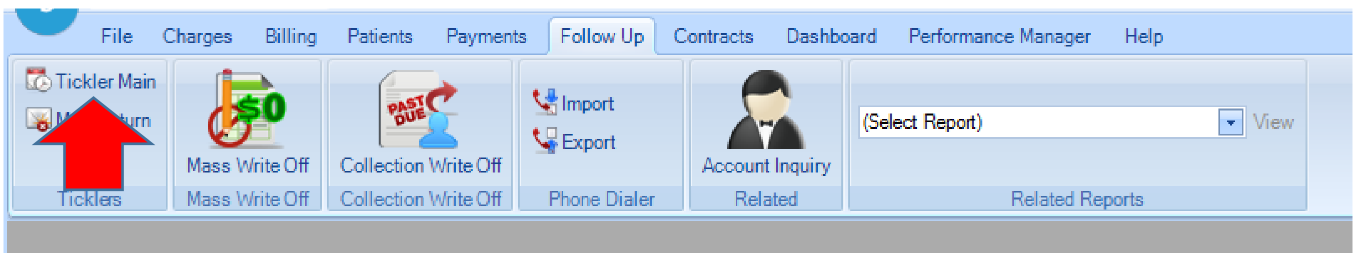
Locating Patient Balances Based on the Provider Schedule:

Front desk and billing staff can quickly review all patient balances in Imagine against the following day's office schedule by following the steps below.

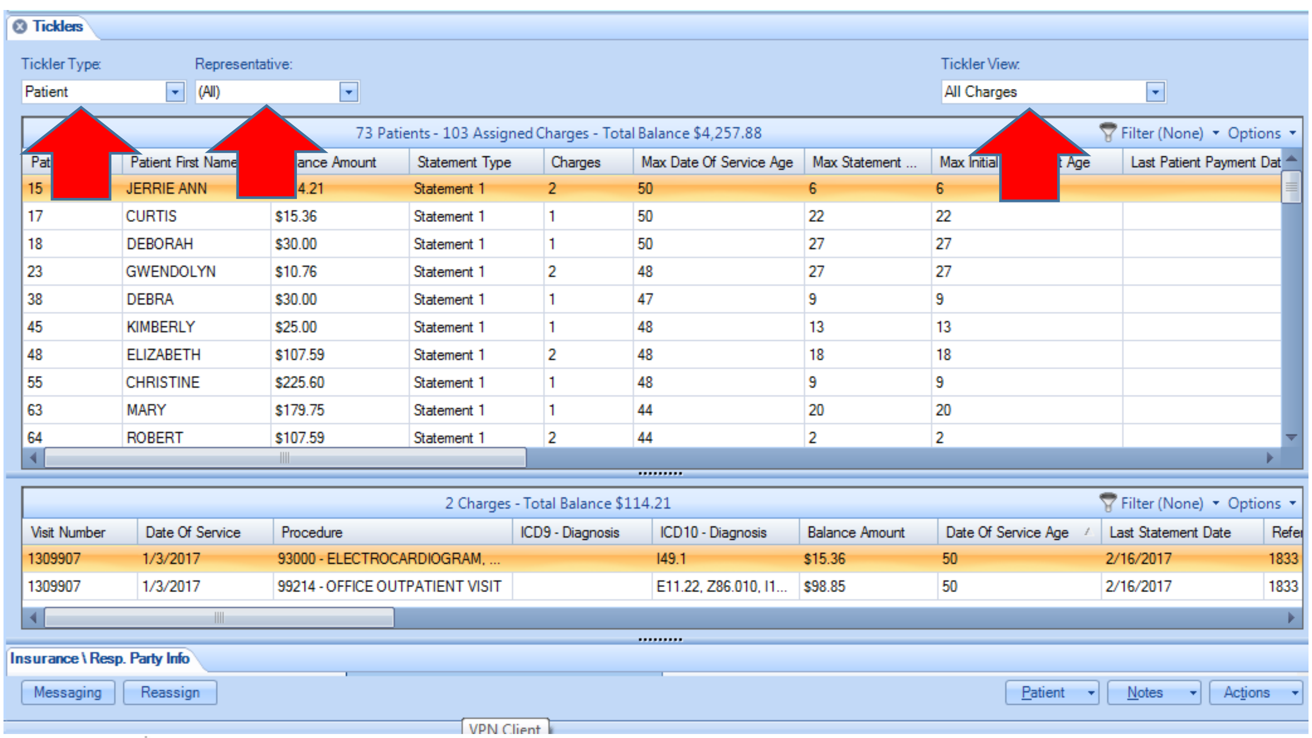
After logging into Imagine, click the Follow-Up menu.



Choose Tickler Main from the sub menu.

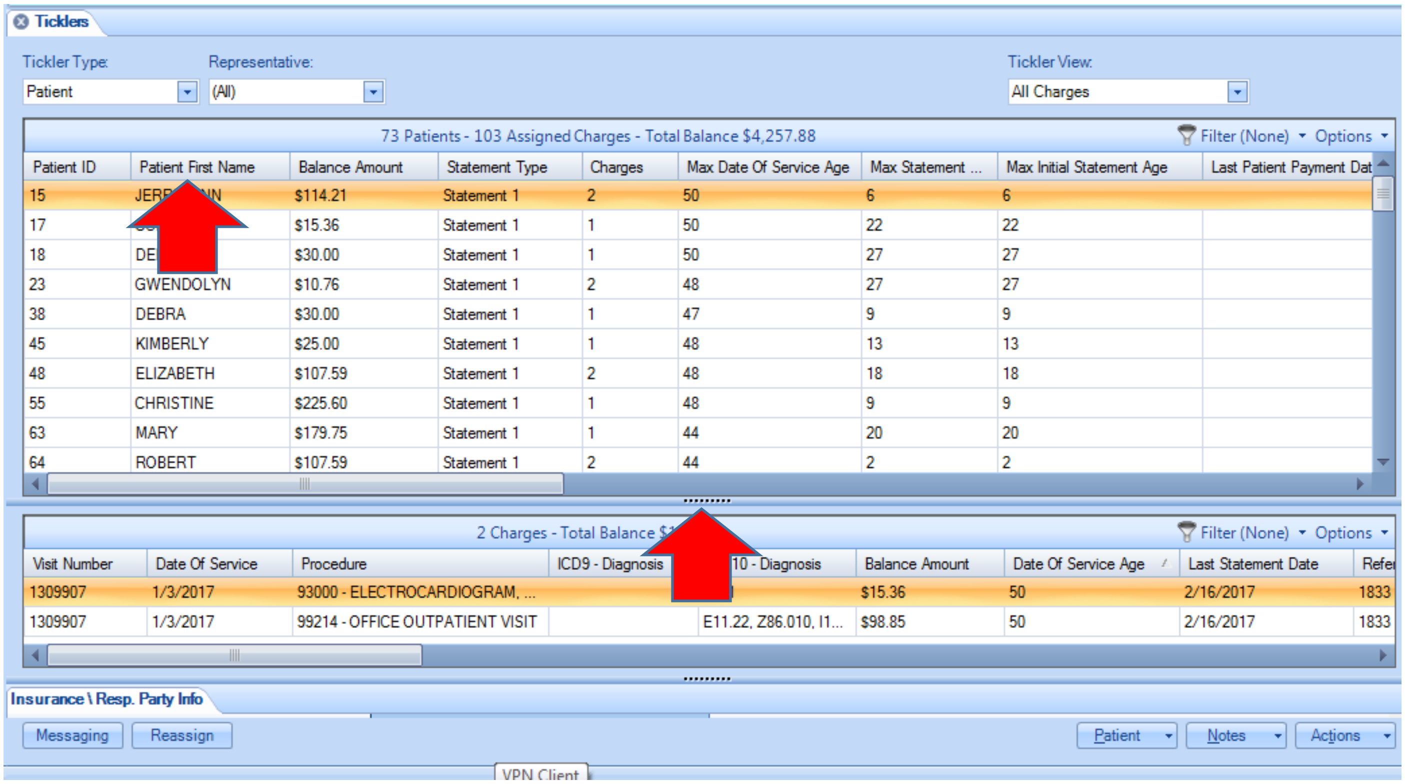


In the Tickler Main tab that appears, choose "Patients' from the Tickler Type drop-down menu. Then choose "All" from the Representative drop-down and "All" from the Tickler View drop-down.

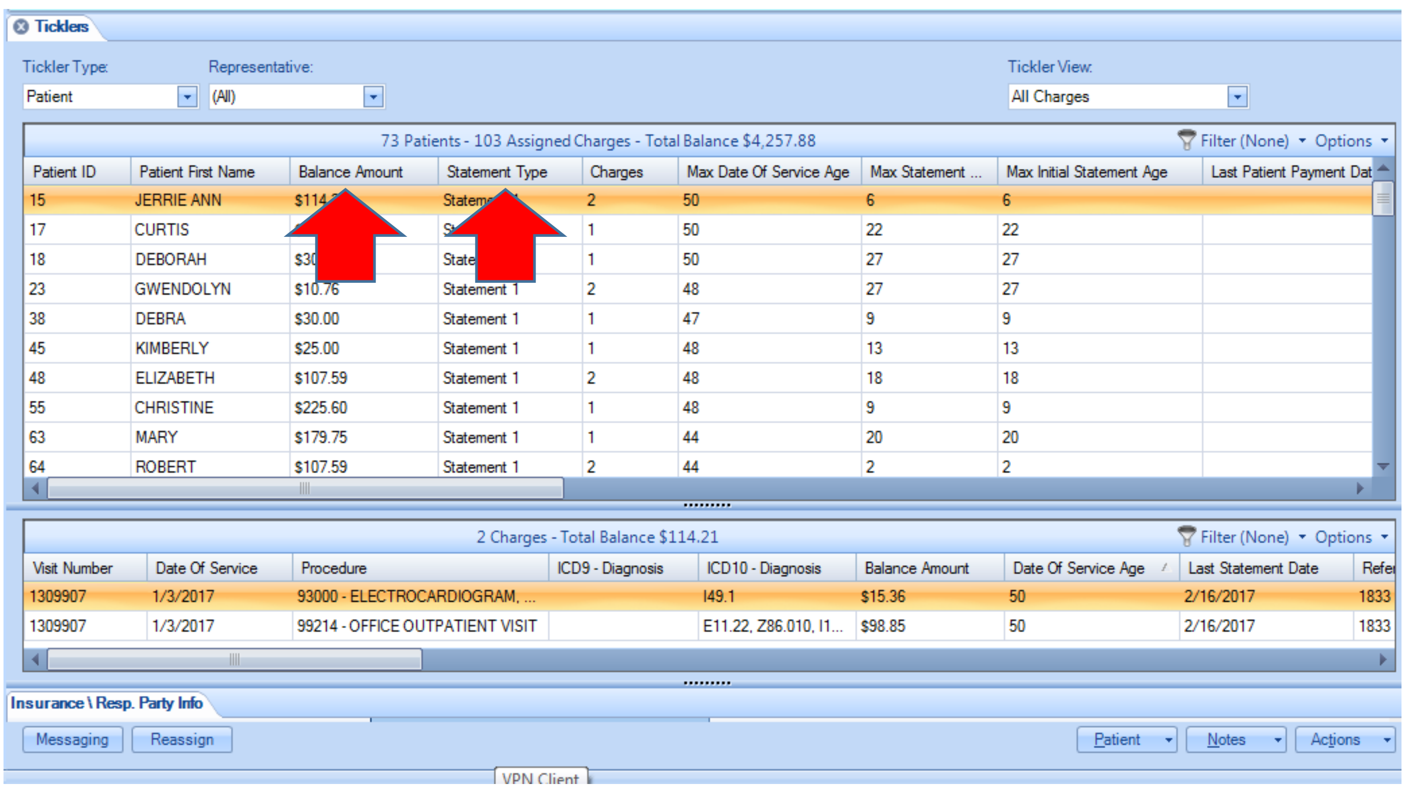


Created: 02222017
Updated: 06112018

Click the Patient First Name or Patient Last Name column headers to sort by name. Use the "……." in the middle and right of the screen to manage your view in order to see as many names as possible at one time.

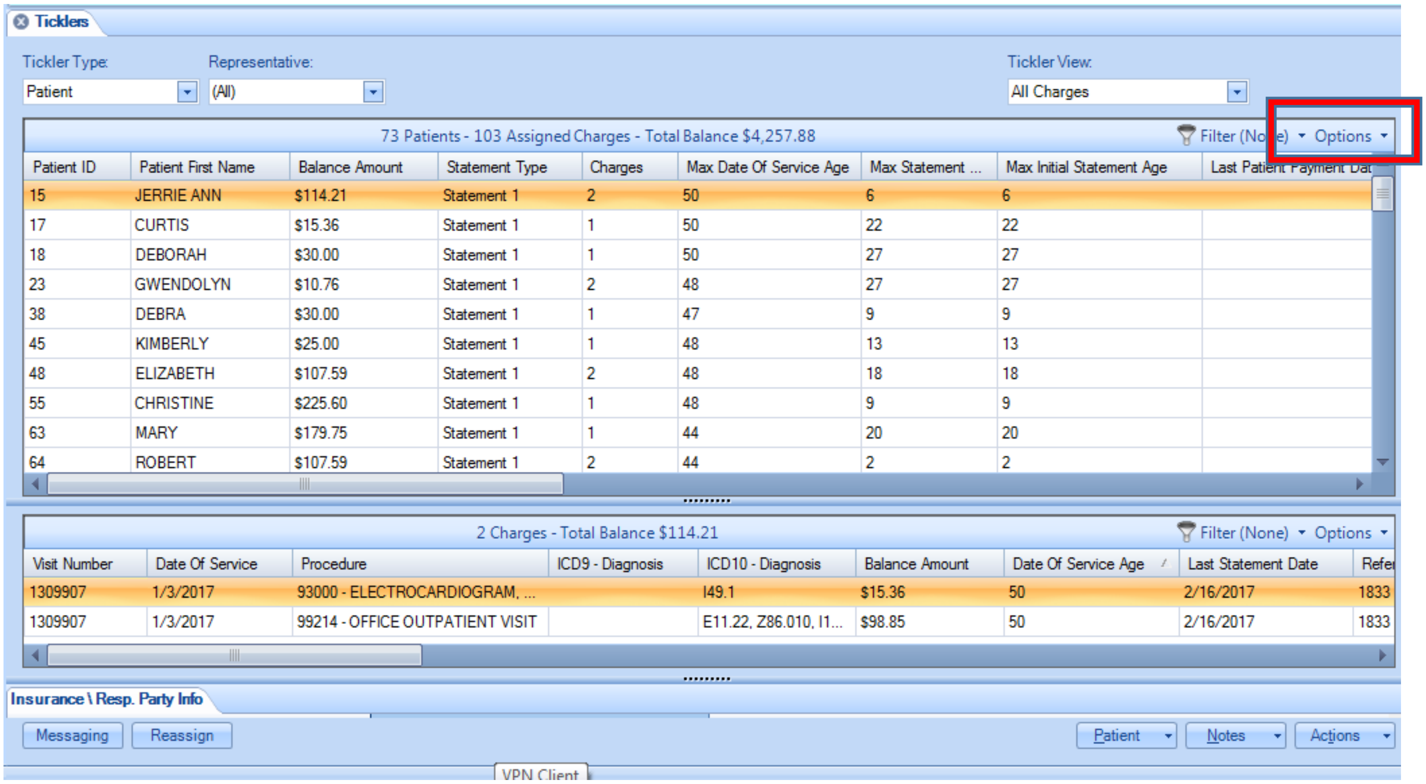


This view is showing all patient balances in Imagine for your practice. User can now review the list and search for balances against the provider's schedule. Balance amount and Statement Stage can also be seen in this view.

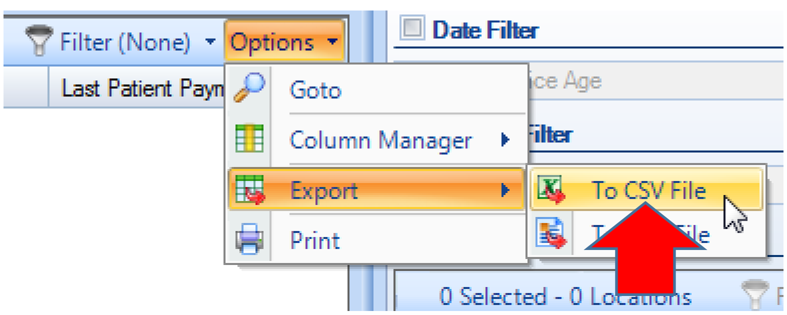


Exporting Patient Balances:

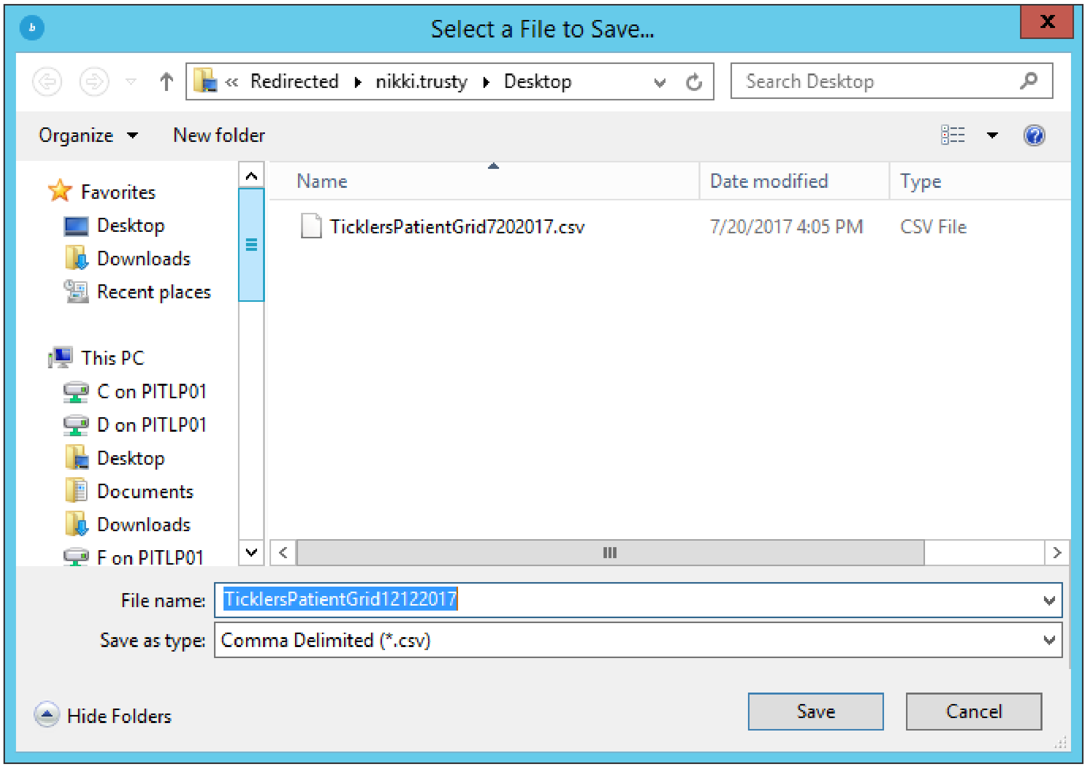
To export the complete list of patient balances, click the “Options” button at the top right of the window.



In the drop-down that appears, click the “Export” option and then choose “CSV”.



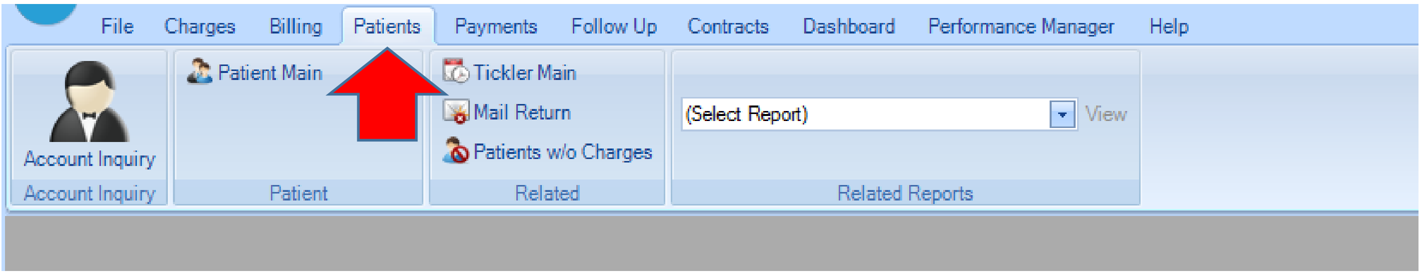
A “Save As” window will appear. When exporting files while in the remote computer it is important to choose the correct folder or desktop option so that the file is sent to your desktop instead of the remote computer’s desktop. See the example below. In the left side of the window we see two options for “Desktop”, one at the top of the list and another under the “This PC” section. To export to our own computer, we should choose the “Desktop” under “This PC”. Then name the file and click Save. The exported list of patients and balances should then be found on your computer’s desktop.



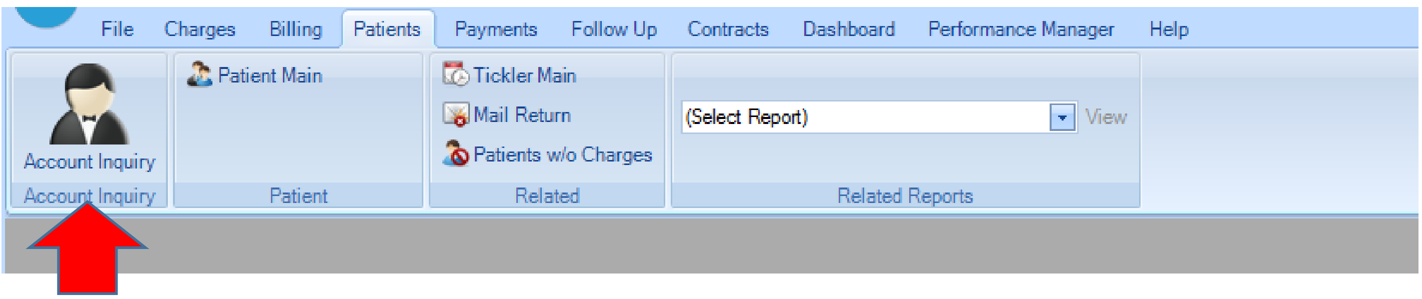
Locating Individual Patient Balances:

In some cases the practice staff may want to review individual patient accounts for balance information.

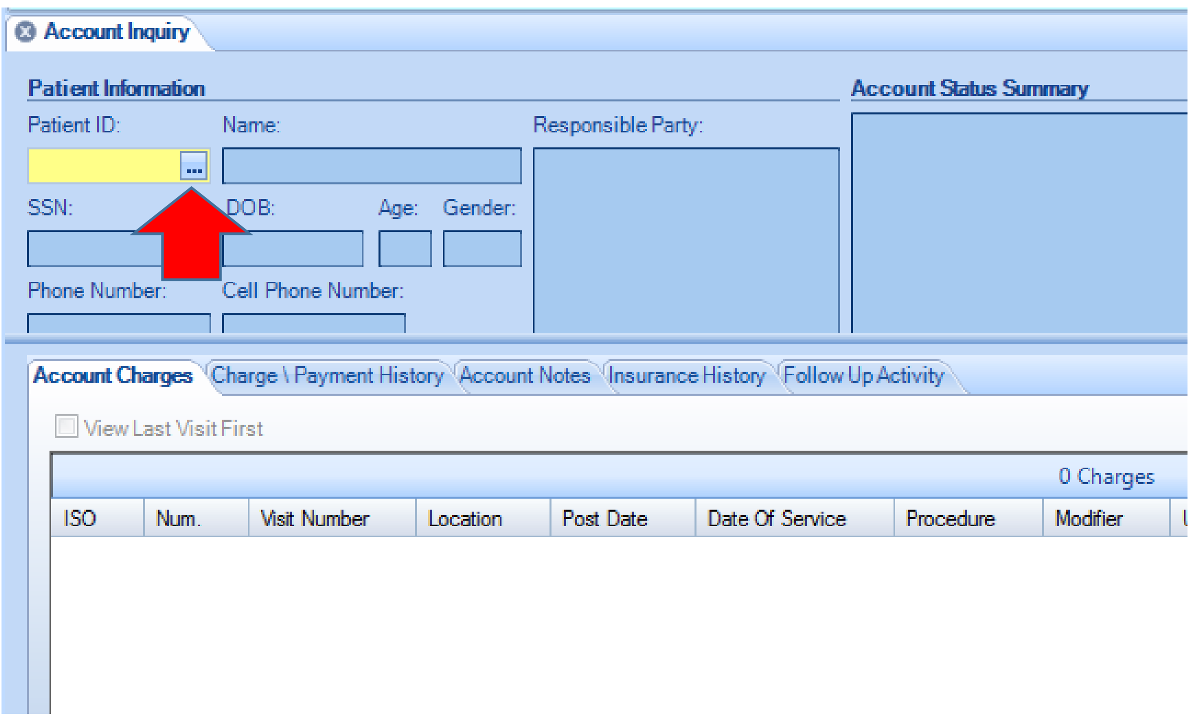
After logging into Imagine, click the Patients menu.



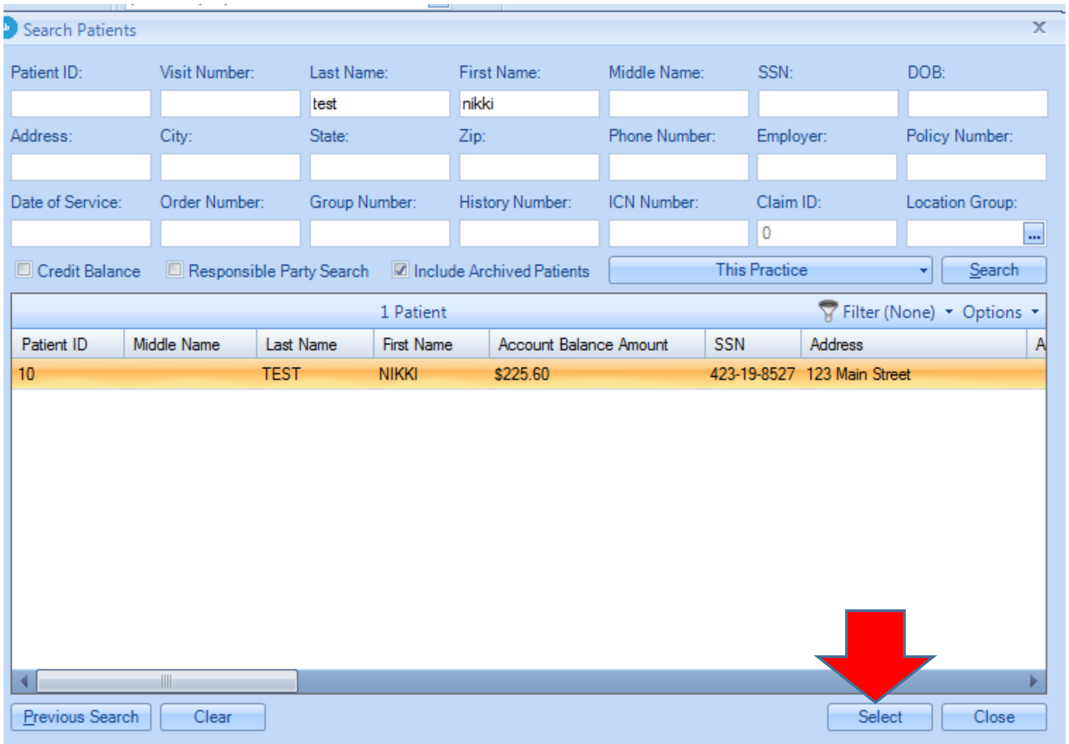
Then choose Account Inquiry from the sub menu.



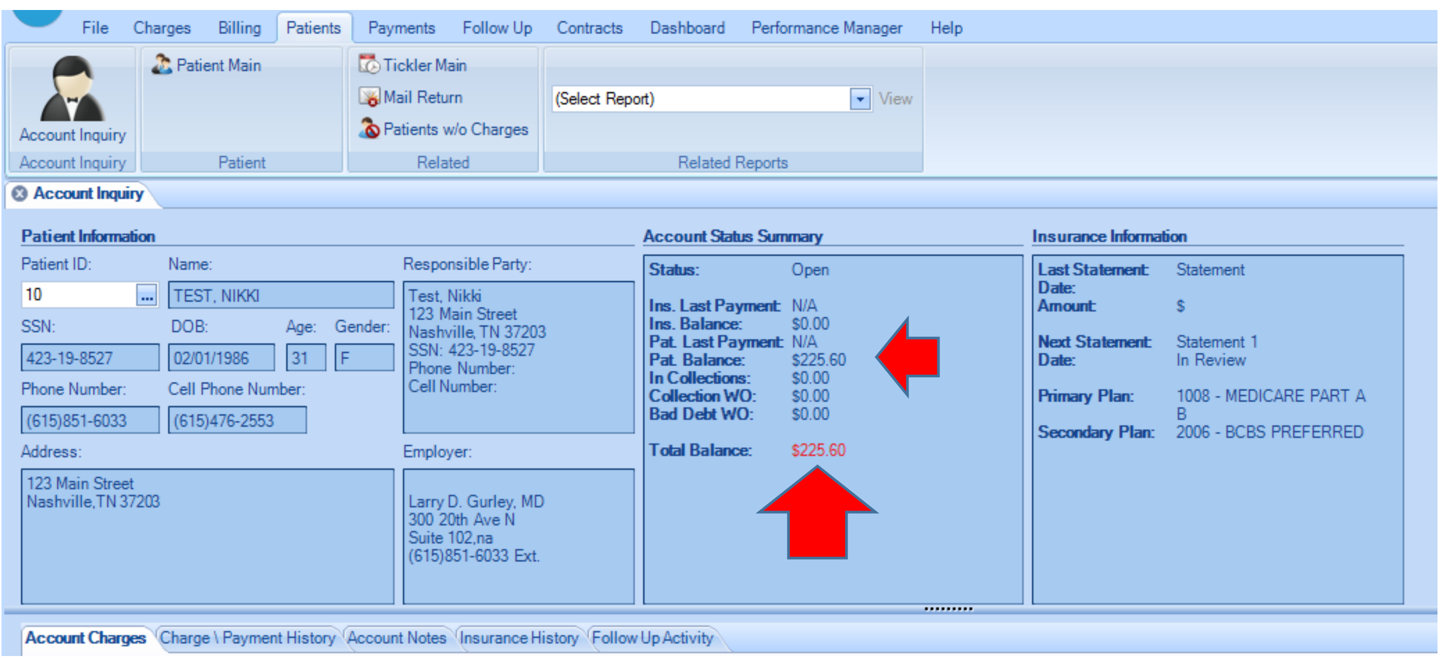
In the Account Inquiry window that appears, open the search window by clicking F3 or the "…" in Patient ID.



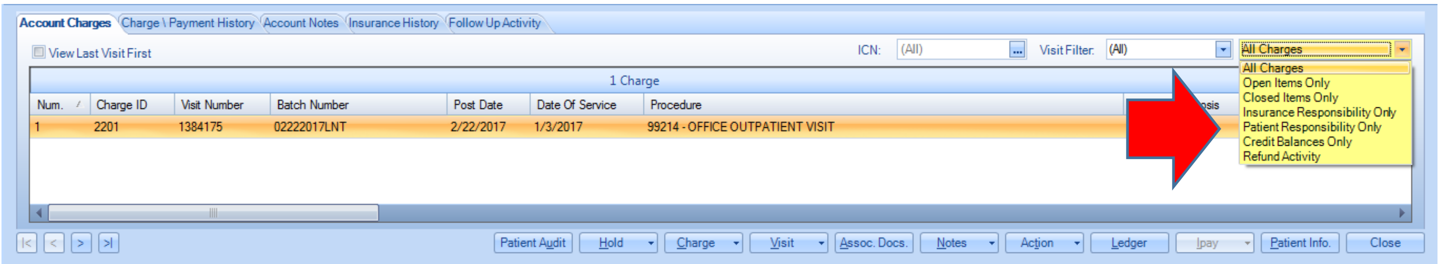
Enter the patient details and Select the patient to open their Account Inquiry.



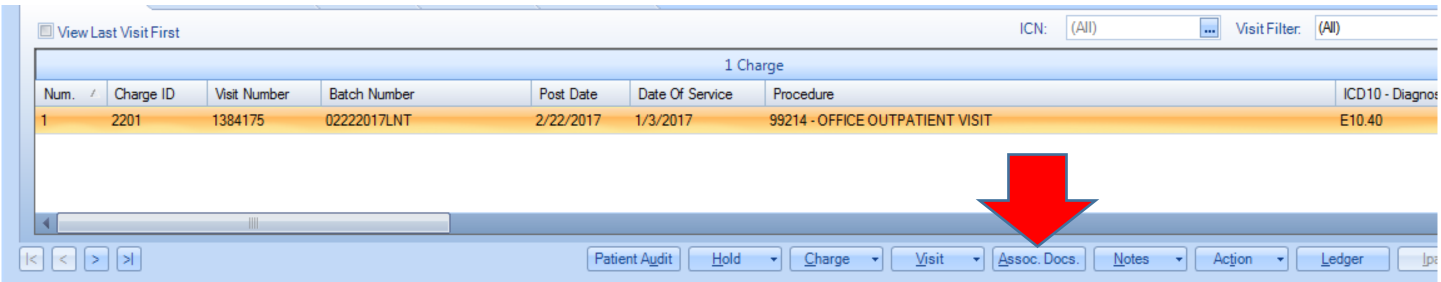
The current balance information can be found in the top section of the window under Account Status Summary. Balance details are divided into Insurance, Patient, and Total.



All posted charges can be seen in the bottom section of the window. Use the filter options to view only charges with patient responsibility.



To view and/or print a copy of the most recent statement, click “Assoc Docs” at the bottom of the window



In the Associated Documents window that appears, Statements will appear in the top middle of the screen. Double click the statement to view and/or print the image.