

Where I do find Payments & Credits to the Study Account?

1. Select Guar Summary in Epic.
2. Locate Payments, Credits and Monthly Statements below.
3. Any questions or corrections, please email CRB@ucsd.edu

The screenshot shows the 'Enterprise Guarantor Summary - 1 of 174 Accounts' page. A sidebar on the left contains navigation options, with 'Guar Summary' highlighted. A red arrow labeled '1.' points to this menu item. A large blue arrow labeled 'Monthly Statements' points to the 'Statements - Enterprise' section, which displays a table of statements. Another blue arrow labeled 'Payments from the Study Account' points to the 'Patient Payments' section, which shows a table of transactions. A third blue arrow labeled 'Credits to Study Account' points to the 'Patient Adjustments - Hospital' and 'Patient Adjustments - Professional' sections. The interface includes various filters, dropdown menus, and a search bar.

1.

Monthly Statements

Payments from the Study Account

Credits to Study Account

Enterprise Guarantor Summary - 1 of 174 Accounts

Acct Summary | Acct List | Acct Actions | Acct Activities | DNB | Go To | Finish | OnBase HAR Query | OnBase Guar Query

Demog/Balances | Notes

(Deceased)

Statements - Enterprise | Displaying statements since 08/26/18. | Last 6 Months

Guarantor does not use MyChart.

T	Date	Sent On	Invoice	Demand?	Info?	Prev Bal	New Chgs	New Pmts	New Adjs	New Bal	Cur Due
▶	01/14/19	01/15/19		N	N						
▶	12/14/18	12/15/18		N	N						
▶	11/14/18	11/15/18		N	N						
▶	09/14/18	09/15/18		N	N						

Statements - Hospital | Displaying statements since 08/26/18. | Last 6 Months

None found.

Statements - Professional | Displaying statements since 08/26/18. | Last 6 Months

None found.

Patient Payments | Displaying 3 transactions since 11/26/18. | Last 20 Txs in 3 Months | Reversed | Show Details

HB/PB	Dep Date	Orig Post Dt	Code-Description	Source	Posted Amount
▶	02/15/19	02/15/19	-ELECTRONIC PAYMENT RESEARCH (...)	Voucher (#)	
▶	01/15/19	01/15/19	-ELECTRONIC PAYMENT RESEARCH (...)	Voucher (#)	
▶	12/17/18	12/17/18	-ELECTRONIC PAYMENT RESEARCH (...)	Voucher (#)	

Patient Adjustments - Hospital | Displaying 8 transactions since 11/26/18. Click here to see the transactions.

Patient Adjustments - Professional | Displaying 9 transactions since 11/26/18. Click here to see the transactions.