Raising an Invoice

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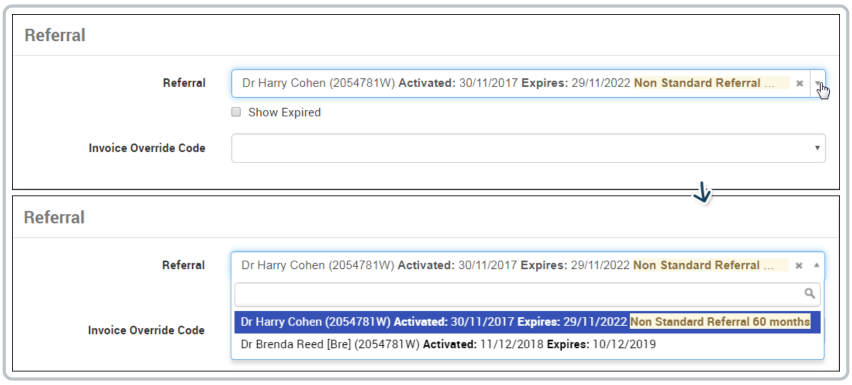
Raise an Invoice

There are several ways in creating an invoice in CareRight

- Via Invoices & Credits
- From the existing patient account - See Invoicing from Patient Account
- From an admission - See Raising a medical Invoice on Admission

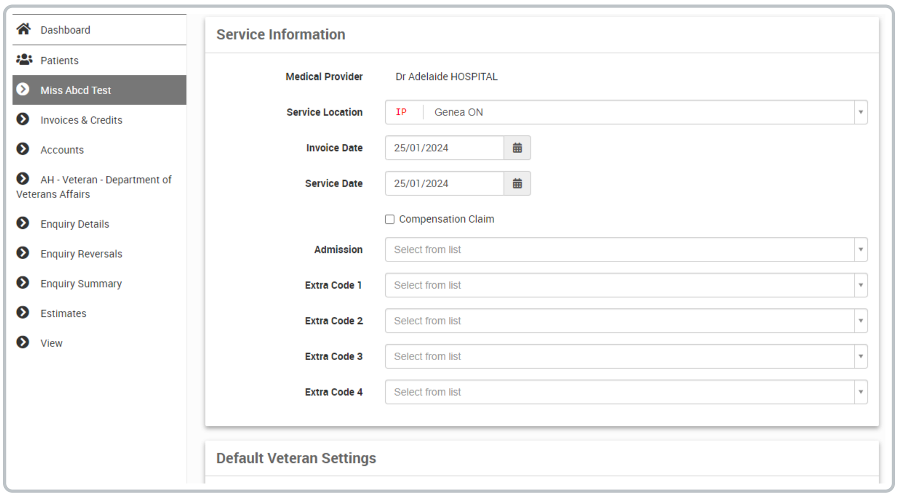
1. Go to **Patients** and select/search the required patient.
2. Select **Invoices and Credits** from the menu.
3. Select **New Invoice** Button.
4. Select the most relevant option:
    a. Guarantor
    b. Service / Account Provider (If the configuration: **Always the service provider for their own accounts** is set on Provider details CareRight skips the confirmation steps when a new Invoice is created. Please refer to Add a new medical provider in the system admin guide.)
    c. Service Location
5. Select the **New Invoice** button.
6. If a Referral is required for the service, select the Referral details.
    a. When selecting a referral during invoice creation, select **Show Expired** to include expired referrals in the listing.



    b. Update any other details as required.

Service Information	
Medical Provider	Displays the medical provider providing the service (read-only)
Service Location	Pop up the list of the service locations applicable to the account and medical provider providing the service

Invoice Date	Date of Invoice is creating, this field will default to the current date.
Service Date	The actual date of Service has been provided.
Compensation Claim (check box)	
Extra Code 1 Extra Code 2 Extra Code 3 Extra Code 4	A user with the permission **"can edit accounting extra codes"** will be able to see and edit these fields when creating invoices if they are enabled. These four fields can be translated as client required with custom drop-down options. Please refer to Translations in the System Admin Guide for more information. The drop-down values are managed by a generic table. A generic table is to be created while the system admin enables/disable each field. Please refer to the Generic table for Invoice/Line Item for more information If the generic table has a "default" value configured it will then default to that value. Please refer to Accounting Setup for information on how to configure these fields
Default Veteran Settings	
Claim Type	Pop up a list of the types of claim, generally only for health fund invoices (most health funds use 'Agreement' except for Medibank Private who use 'Scheme')
Informed Consent	Pop up a list of the types of informed financial consent, generally only for health fund invoices (linked to the claim type so most health funds use 'Verbal' except for Medibank Private who use 'Not Obtained')
Compensation Claim	Marked if a compensation claim
Admission	Pop up a list of the available admissions the invoice can be linked to (used for statutory reporting)
DVA Treatment Location	



7. Select **Create Invoice**.
    a. The Invoice screen will display.
8. Scroll down to the **New Line items** section (*To search using item description see* Accounting Overview > Line Items)
    a. Select the Item Number from the drop-down Note: If other information is to be added - Select the Other Line Items Values button - see Other Line Item values.
    b. When searching for a line item to add to the invoice, be sure to enter search criteria *starting* with the exact term you wish to look for. For example, entering "01" would return 01761, 01863, 01862, 01982, but would **not** display 90178, 34017, 19012, etc.
9. Select **Add line item to Invoice** (this will populate the line items section).
10. For additional line items, repeat the above process.
11. Once all items are added, select **Create Invoice** button.
12. An invoice will be created.

Once an invoice has been created you can:

- Edit an Invoice - To edit the details of the invoice related to referral, online claiming or admission
- Reverse an Invoice - To reverse the invoice
- Pay in Full - To enter a full payment of the invoice
- Pay Out Of Pocket - To pay the amount of the invoice
- Print an Invoice - To print a copy of the invoice
- Claim an Invoice - To process claiming

⊕ Invoice Statuses