Invoicing from Patient Accounts

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Invoicing from Accounts

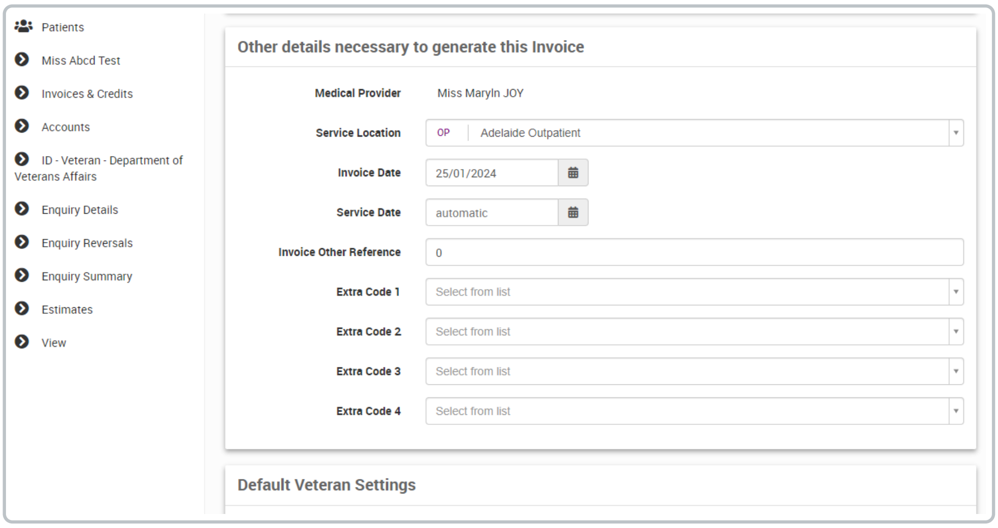
This describes the Invoicing process directly from the Accounts screen.

1. Search for a patient.
2. Click **Show**.
3. In the Main Menu, click **Accounts**.
   a. The Patient Accounts screen will display
   b. There are two different ways an invoice can be created from the Accounts screen
      i. Via New invoice in the top banner
      ii. Via Accounts > Enquiries > New Invoice
4. Select any of the two options to create an invoice
   a. Select the Guarantor or other fields as required.
5. Select the **Create Invoice** / **New invoice** button to continue.
   a. An additional information screen will display, fill in the following fields (see table below).

Field Name	Description
Referral	
Referral	Pop up a list of the active referrals for the patient. Checking the box **Show Expired** will trigger the system to include expired referrals in this list In general, the validity of a referral is : • 3 months, If the professional contact is a specialist, and • 12 months,f the professional contact is a GP
Invoice Override Code	Pop up a list of reasons why a referral may not be applicable.
Other details necessary to generate this Invoice	
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

Field Name	Description
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.
Invoice Other Reference	
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 (checkbox)	Marked if a compensation claim
Admission	Pop up a list of the available admissions the invoice can be linked to (used for statutory reporting)
Default Veteran Settings	

Field Name	Description
DVA Treatment Location	



6. Click Create Invoice to continue.

7. The Invoice screen will display, the following values.

Field Name	Description
Invoice (for reference only - data not changeable here)	
Medical Provider	Displays the medical provider providing the service
Service Location	Service location where the service is provided
Referral	Details of the referral link to the invoice
A/C to	Who is responsible for the payment of the invoice and the address
Name	Which rate the default price for the item will come from
Billing Provider Number	The medical provider's number for the specified service location
Extra Code 1	

Field Name	Description
Extra Code 2	
Extra Code 3	
Extra Code 4	
Invoice Items (for reference only - data not changeable here)	
Invoice Total	The total price of the items on the current invoice
GST Total	The total of the GST on the items on the current invoice
Out Of Pocket	This is the total of the Out Of Pocket amount (gap + excess + copay), if any.
New Line Item	
Service Date	
Item Number	
Time Of Service	
Units	
Ex Gst Price	
Gst Applicable (checkbox)	
Description	
Notes	
Note	

8. Add invoice items details. As you enter the Item Number the following buttons will display

- Add Line Item to Invoice - To add more line items
- Other Line Item values: There are times where extra information is required to be transmitted with the Invoice, this can be entered here.
- Create Invoice - To create an invoice, No further line items can be added once the invoice been created.

9. Once the Item Number are all added, select the **Create invoice** button

10. The invoice will be generated and a summary screen will appear for each line item on the invoice.

11. Once the invoice is created then, depending on the workflow and account type the invoice may print or be made available for online submission.

12. Refer to Claims for IHC/IMC and health fund claiming.