

Review an Existing Account - Enquiries

Last Modified on 18/06/2021 9:19 am ACST

Enquiries (Review Account Details)

An overall review of the patient account can be seen in Account Enquiries.

From the patient accounts, Click **Enquiries**

Mr Andrew Anderson

Male, aged 72 years, currently admitted to Clintel Rehabilitation Centre. Mobile Phone: 0426286951

Male Assessor Suicide Risk Blood Thinner Codeine Consent Required Consent Changed

ACTIVE INACTIVE

New Account New Invoice New Deposit Payment From Patient Payment From Guarantor

Dashboard / Clients / Mr Andrew Anderson Overseas

BUPA Australia

Clintel Hospital

Medical Provider	Name	Balance
Hosp Clintel HOSPITAL	SH - Fund - BUPA Australia	\$405.40

Enquiries

The Enquiries screen allows you to see one of 4 views of the account activity:

- **DETAILS** (Enquiry Details in the list) - An itemised history of the account
- **SUMMARY** (Enquiry Summary in the list) - A list of the invoices, receipts and adjustments raised on the account
- **ALL** (Enquiry Reversals in the list) - The Summary view, including all the reversed entries
- **View** - Information about the account when it was initially created (this is a sub-menu on the left of the screen)

Mr Andrew Anderson

Invoices & Credits

Accounts

SH - Fund - BUPA Australia

Enquiry Details Enquiry Reversals Enquiry Summary View

Male, aged 72 years, currently admitted to Clintel Rehabilitation Centre. Mobile Phone: 0426286951

Male Assessor Suicide Risk Blood Thinner Codeine Consent Required Consent Changed

DETAILS SUMMARY ALL

New Invoice New Deposit Payment From Patient New Estimate New Note Adjustment Print Selected

Dashboard / Clients / Mr Andrew Anderson / Accounts / SH - Fund - BUPA Australia

Balance

\$405.40

Unpaid

<input type="checkbox"/>	Number	Service Date	Item Number	Description	Billed	Paid
<input type="checkbox"/>	1511	02/04/2021	OB	Opening Balance	\$100.00	
<input type="checkbox"/>	865	20/02/2019	104	Specialist, referred initial consultation	\$102.70	
<input type="checkbox"/>	862	02/02/2018	ACC3	Accommodation Charge - Level 3	\$100.00	
<input type="checkbox"/>	793	20/03/2017	104	Specialist, referred initial consultation	\$102.70	

Unallocated Credits

Statement Date	Details	Receipt	Adjustment
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History

<input type="checkbox"/>	Number	Service Date	Item Number	Description	Billed	Pa
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Following actions can take place from the enquiry screen

- [New Invoice](#) - To create a new invoice for the account selected
 - [New Deposit](#) - To take a Deposit for this account
 - Payment from Patient - Take payment from the patient for the account selected
 - [New Estimate](#) - To take an estimate for the selected account
 - New Note - This field is available for reporting
 - [Adjustment](#) - To add Any adjustment for an account
 - Print Selected - Selected records can be printed.
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