

Take a Deposit or Credit - Via Patient Accounts

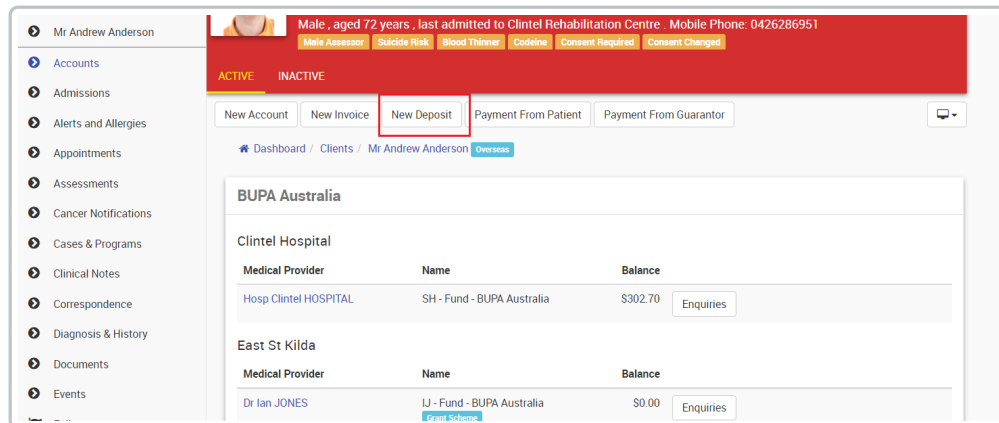
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Credits/Deposits

Credits on accounts could be used for a variety of reasons. The patient is paying a deposit on services not yet rendered or accrued.

The deposit can be added two ways in Patient accounts

1. The **New Deposit** button in the patient Account tab.



Mr Andrew Anderson

Male, aged 72 years, last 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	\$302.70	Enquiries

East St Kilda

Medical Provider	Name	Balance	
Dr Ian JONES	IJ - Fund - BUPA Australia	\$0.00	Enquiries

2. Via Account **Enquiries**

1. [Search](#) for a patient.
2. Click **Show**.
 - a. In the Main Menu, click **Accounts**.
 - b. Select the **Enquiries** button next to the relevant Account.
 - c. Select the **New Deposit** button and the add new deposit screen will open.
 - d. Fill in the appropriate values (as above) however, the Medical Provider value auto-populate (based on the selected Account).
3. Select either:
 - a. Create Receipt button - This will receipt the payment or,
 - b. Create Receipt & Print button - this will receipt the payment and open a PDF for printing

4.

STORAGE RISK

Dashboard / Clients / Mr Nick Cuthbertson

Receipt

Date: 09/06/2021

Location: Clintel Rehabilitation Centre

Medical Provider: Hosp Rehab HOSPITAL

Receipt Note (Printed):

Statement Note:

☐ Services Involving GST?

Transaction

Method*:

Credit: 0.00

Create Receipt Create Receipt & Print Cancel Advanced

Interface

Note:

When making a new deposit from patient account, location will be prefilled, and in the following cases, provider will be prefilled as well.

- If you have only one account, it will pre-fill.
- If you have multiple accounts, it won't pre-fill.
- If you have multiple; but you have set a primary provider and there is a patient account for that primary provider, it will pre-fill to that.
- If you have multiple accounts, but are viewing one specifically, and take a deposit in that context it will default.