Take a Deposit or Credit - Via Patient Accounts
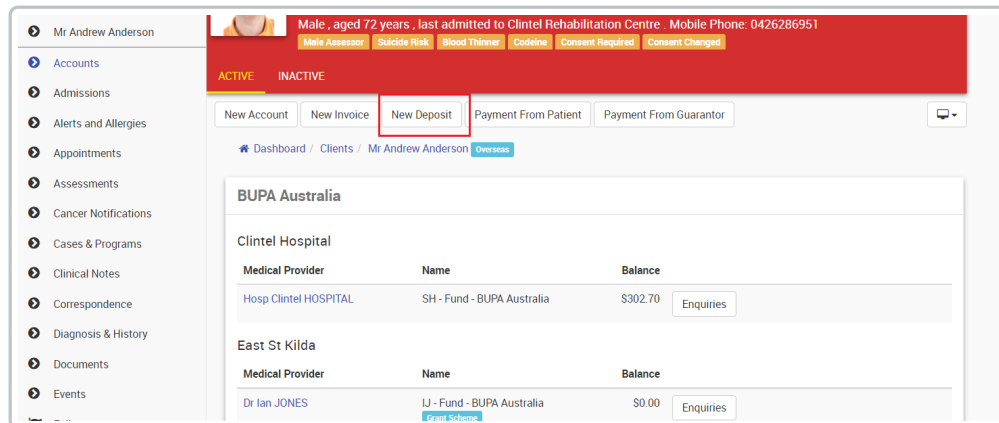
Last Modified on 23/01/2023 12:32 pm ACDT

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.

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.

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.