Raising an Invoice

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Invoicing

Types of Invoices

There are 5 major types of invoices that can be raised in CareRight.

- Medicare Bulk Bill or DVA
- Heath Fund
- Private
- Other – 3rd Party
- In Hospital Claims

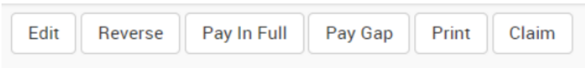
Raising an Invoice

1. Go to **Patients** and select/search the required patient.
2. Select **Invoices and Credits** from the menu.
3. Select **New Invoice** button.
4. Fill in all details regarding Guarantor, Service Location & Provider.
5. Select **New Invoice** button.
6. If a Referral is required for the service, select the **Referral details**.
7. Update any other details as required.
8. Select **Create Invoice**, the Invoice screen will display.
9. Scroll down to the **New Line** items section.
10. Select the **Item Number** from the Drop down.
11. Select **Add line item to Invoice** (this will populate the line items section).
    a. For additional line items, repeat the process (steps 10 & 11).
12. Once all items are added, select **Create Invoice** button.
    a. Invoice will be created.

Once an invoice has been created you can:

- Edit
- Reverse
- Pay in Full
- Pay Out Of Pocket
- Print
- Claim

These buttons are displayed under the patient banner on the Invoice screen:



Paying in Full

1. From the Patient record, select the invoice to be paid in full.
2. Select the **Pay in Full** button (at the top of the page, under the patient banner)
    a. The Payment screen will display
3. In the Transaction section, select the **Method of payment** and amount
4. If the payment is being made by multiple methods (e.g., credit card & cash), select the **Advanced** button
    a. This allow a split payment to be entered.
5. Select **Add Transaction to Receipt**.
6. Once all payment methods are entered, select Create Receipt or Receipt and Claim button.

Pay Out Of Pocket

1. From the Patient record, select the invoice to pay out of pocket on.
2. Select the **Pay Out Of Pocket** button (at the top of the page, under the patient banner).
    a. The Payment screen will display.
3. In the Transaction section, select the **Method of payment** and amount.
4. If the payment is being made by multiple methods (e.g., credit card & cash) select the

Advanced button.

    a. This allow a split payment to be entered.

5. Select **Add Transaction to Receipt**.
6. Once all payment methods are entered, select Create Receipt or Receipt and Claim button.

Claim an Invoice

1. From the Patient record, select the invoice to pay out of pocket expenses on.
2. Select the **Claim** button (at the top of the page, under the patient banner).
    a. This will display the Claims screen.
3. Select **Patient Claim Interactive** button.
4. Fill in any relevant details, select **Next** button.

Printing a Receipt

1. From the Patient record.
2. Select **Invoices and Credits**.
3. Select the **Show** button next to the Receipt.
    a. The Receipt will display.
4. Select the **Print** button (at the top of the page, under the patient banner).
    a. The Receipt will either auto print or download for printing depending on your settings.

Printing an Invoice

1. From the Patient record.
2. Select **Invoices and Credits**.
3. Select the **Show** button next to the Invoice.
    a. The invoice will display.

4. Select the **Print** button (at the top of the page, under the patient banner).
    a. The Invoice will either auto print or download for printing depending on your settings.

Please Note: There are 3 templates in CR for Invoices, these caters for 1 page (approx. 9 items) , 2 pages (approx. 20 Items) & 3 pages (approx. 29 items). If you need to bill more than 29 items, then we recommend you split your billing across multiple invoices.