Reversing an Invoice

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Invoices can only be reversed when there are no allocations linked to them. Therefore any invoice you wish to reverse should appear in the 'Invoices and Credits' section of a patient record under the **Unpaid** tab.

The process to follow is:-

(If you know the invoice number involved, you can skip directly to step 5 by using the **Advanced Search** feature and in the **Financial** section, entering the invoice number)

1. Find the patient

2. Select **Invoices & Credits** from the sidebar

3. Select the **Unpaid** tab from the banner

4. Click the **Show** button next to the required invoice

5. Confirm that there are no allocations to any of the items. If there are allocations, you will need to re-allocate those payments before proceeding

6. Click the **Reverse** button just below the banner

7. If configured in **CareRight Administration>Global Settings**, you will be required to provide a reason for the reversal.

8. Click the **Yes** button to complete the process