

Activate/Deactivate an account

Last Modified on 20/12/2022 7:55 am ACDT

Activate/Deactivate a patient account

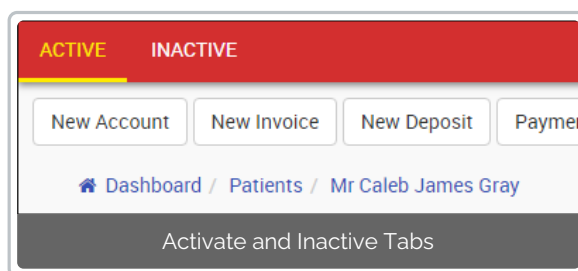
Active Account

The Patient Accounts screen organizes accounts into **Active** (the default tab) and **Inactive**.

An active account includes all accounts that are either active or have a non-zero balance (including inactive accounts with non-zero balances).

Inactivate an Account

- An inactive account includes all accounts marked as inactive.
- Making an account inactive:
 - Moves the account to the inactive screen
 - Stops the user from creating invoices / receipts directly in the inactive account
 - Any inactive accounts will show up in the **All accounts** screen until the account has a zero balance
 - A receipt can be created in another account and allocate money to any invoices outstanding in the inactive account
 - Account can be enabled and will still allow a user to, create an adjustment writing of an outstanding allocate it to outstanding items then make the account inactive again
 - **NOTE:** The new invoice screen will create a new account when selecting **New invoice** if an inactive account has the same details as the invoice created. e.g. I have an inactive account for BUPA for Clintel Clinic. When I create a new invoice for BUPA Clintel clinic a new patient account is created for BUPA Clintel Clinic.



1. Select the Patient.
2. Click **Account** to be activated or deactivated.
3. Click **Enquiries** or **Estimate**.
4. Select **View** from the left-hand side menu.
5. Click **Edit**.
6. Under section **Administration**, tick/untick the box **Inactive Account**.
7. Click **Update Account**.



MRN: 000251 CRN: 001065 Primary Provider: Dr Richard Wood-Baker Fund: iTest Health Fund, 123
Female, aged 8 years and 11 months, currently admitted to Head Office in Melbourne. Mobile Phone: 04

X-Rays Required

Hearing Services Program

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Location	Head Office in Melbourne
Guarantor	National Disability Insurance Agency
Account Provider	Capt Acso ORGANISATION
Account Flag	

☒ Inactive Account

☐ To Debt Collectors