Edit an existing patient account

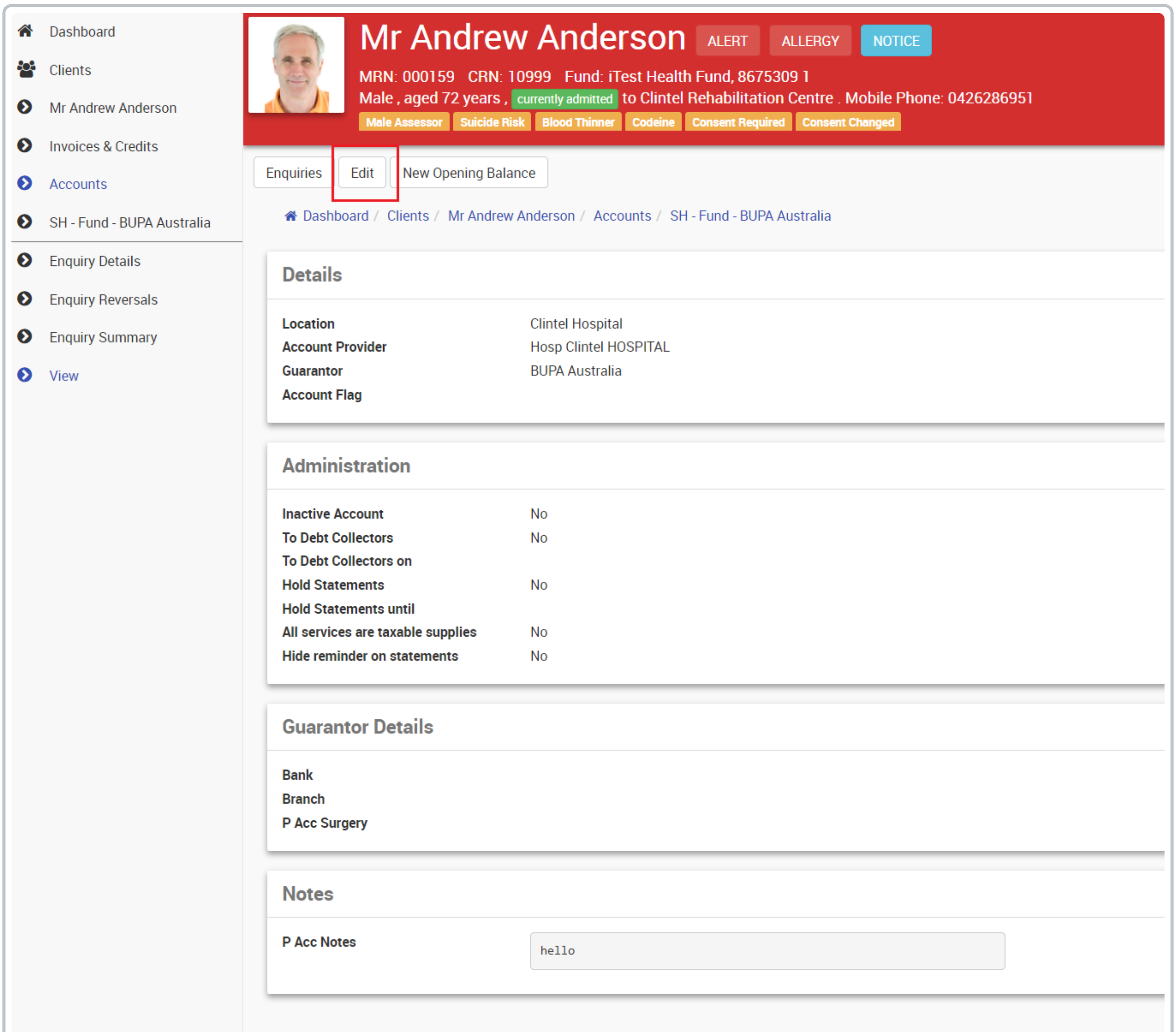
Last Modified on 18/06/2021 9:20 am ACST

Edit an Existing Patient Account

Sometimes an existing account may be correct (type, associate & guarantor etc) but other changes need to be made, including changing the active state or rate.

Follow these steps to edit an existing account:

1. From the patient record, click **Accounts**
2. Click **Enquiries** for the required account
3. Click **View** (from the left menu)
4. Click **Edit** (top screen).



Interface

You will see most of the fields that were present when the account was created with the addition of an Administration section.

Field Name	Description
Inactive Account	Prevents the account from appearing as an option when raising invoices etc. This controls the active/inactive status of the account.
To Debt Collectors	If the account has been referred to a debt collection agency. Will also prevent the account from being included in the statement run.
To Debt Collectors on	Date the account was referred to the debt collection agency
Hold Statements	Whether to prevent the account from being included in the month-end statement run
Hold Statements until	Date until the above choice is effective (default is 90 days from when activated)
All services are taxable supplies	Whether to apply the GST by default to ALL items on the account.
Hide reminders on statements	Whether to hide the message on the statement of the account for the relevant duration the account has been outstanding

Generally, you should only be altering the data in the other sections if it is to add information that wasn't available when the account was created.