

# Opening Balance - Only be used when organisations initially implement CareRight.

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## Opening Balances

Carryover /Opening balances should only be used when organisations initially implement CareRight.

They may need to carry these amounts over to CareRight.

Opening Balances can be added against a patient record as follows:

1. Select a patient.
2. Click **Show**.
3. In the Main Menu, click **Accounts**.
  - a. The Patient Accounts will display
4. Select **Enquiries** next to the relevant Patient account.
5. Select the **View** sub-menu item from the left side menu.
6. Select the **New Opening Balance** button.
  - a. The Balance Screen will display.
7. Enter the appropriate values either Debit or Credit.
8. Select **Create Opening Balance**.

The screenshot displays the CareRight user interface for a patient named Miss Polly Anna. The left sidebar contains a navigation menu with options: Miss Polly Anna, Invoices & Credits, Accounts (selected), SH - Fund - iTest Health Fund, Enquiry Details, Enquiry Reversals, Enquiry Summary, and View. The main content area has a red header bar with patient details and status tags (Suicide Risk, Ready to Bill, Accounting Notes, No Medicare Card, X-Rays Required). Below the header, there are buttons for Enquiries, Edit, and a highlighted 'New Opening Balance' button. A breadcrumb trail shows the path: Dashboard / Clients / Miss Polly Anna / Accounts / SH - Fund - iTest Health Fund. The interface is divided into three main sections: Details, Administration, and Guarantor Details. The Details section includes fields for Location (Clintel Hospital), Account Provider (Hosp Clintel HOSPITAL), Guarantor (iTest Health Fund), and Account Flag. The Administration section includes fields for Inactive Account, To Debt Collectors, To Debt Collectors on, Hold Statements, Hold Statements until, All services are taxable supplies, and Hide reminder on statements. The Guarantor Details section includes fields for Bank, Branch, and P Acc Surgery. A Notes section at the bottom includes a field for P Acc Notes.

Location	Clintel Hospital
Account Provider	Hosp Clintel HOSPITAL
Guarantor	iTest Health Fund
Account Flag	

Inactive Account	No
To Debt Collectors	No
To Debt Collectors on	
Hold Statements	No
Hold Statements until	
All services are taxable supplies	No
Hide reminder on statements	No

Bank	
Branch	
P Acc Surgery	

P Acc Notes	
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