

# Adjustments - From patient Accounts

Last Modified on 21/12/2022 3:29 pm ACDT

## Adjustments

Adjustments are used to Add or Subtract revenue from line items. The health fund may have paid more than expected. You offer to pay on the day discounts etc.

After finding a patient

1. Click **Accounts**.
  - a. The Accounts screen appears.
2. In an account row, click **Enquiries**.
3. Click **Adjustment**.
4. Define Adjustment Details
  - a. In the **Amount** field, enter an amount. This will be the amount to add/subtract to Invoice items
  - b. In the **Date** field, click the mini-calendar and select a date.
  - c. In the **Adjustment Type** field, select the most relevant type of adjustment being made.
    - i. If you are subtracting revenue select the most applicable adjustment type with (Credit) following
    - ii. If you are adding revenue select the most applicable adjustment type with (Debit) following
  - d. In the **Statement Note** field, enter any relevant details about the adjustment.
  - e. Click **Next**.

Dashboard / Patients / Mrs Bertha R Rashid / Accounts / SA - Fund - BUPA Australia

### Adjustment

Amount	10
Date	28/05/2020
Adjustment Type	Write Off (Credit) ▼
Statement Note	<div></div>

**Next >>** **Cancel**

5. Allocate the Adjustment
  - The adjustment amount will auto-populate into the **Allocate** field
  - When done, click **Create Statement**.

Invoices & Credits

Accounts

ESK - Fund - iTest Health Fund

Enquiry Details

Enquiry Reversals

Enquiry Summary

View

Dashboard / Clients / Mr Nick Cuthbertson / Accounts / ESK - Fund - iTest Health Fund

Adjustment

Credit

\$50.00

Debit

\$0.00

Date

09/06/2021

Adjustment Type

Discount (Credit)

iTest Health Fund: Hosp Rehab HOSPITAL

Invoice	Item	Service Date	Billed	Paid	Patient Gap	Due	Allocate	
873	ACCS	15/05/2019	\$180.00	\$150.00	\$50.00	\$30.00	<input type="text" value="0.00"/>	clear

Create Statement

Cancel

**IMPORTANT to NOTE:** You **can** apply an adjustment to a paid invoice. But you must do it directly to the appropriate line item from the invoice page.