

Link provider to invoices and accounts

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1. Introduction

This guide explains how to make sure newly created or existing providers are visible in the dropdown list when creating a new invoice or patient account.

2. Accessing the Dashboard

Start by accessing the system dashboard to begin managing providers.

3. Finding and Editing Providers

Navigate to the "Provider" section and select the provider you want to edit.

4. Managing Provider Settings

Scroll down to the bottom of the provider settings page to see checkboxes.

5. Checking Inclusion Criteria

Make sure to check the boxes for:

- Referral required for all invoices
- Inclusion in Invoicing Associates List
- Inclusion in Account Management Entities
- Always the service provider for their own accounts
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- ☐ Is a referral required for all invoices?
 - ☐ Include in invoicing associates list
 - ☐ Include in account management entities
 - ☐ Always the service provider for their own accounts
 - ☐ Enable rate overrides for private accounts
 - ☐ Item is not normal after care by default
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6. Verifying Provider Visibility

Check if the provider is now visible in the dropdown list when creating a new invoice.

By following these steps, you can ensure that providers are easily accessible in dropdown lists for efficient invoice creation and patient account management.
