3rd party invoicing (e.g TAC)

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Invoice a patient covered by a 3rd party, like an employer or the Transport Accident Commission (TAC). The invoice will be raised in Zedmed and sent to the 3rd party by an external method such as post or email.

For this type of invoice, the third party must be set up as the patient's payer.Learn more.

Create a third-party invoice

To create a 3rd party invoice:

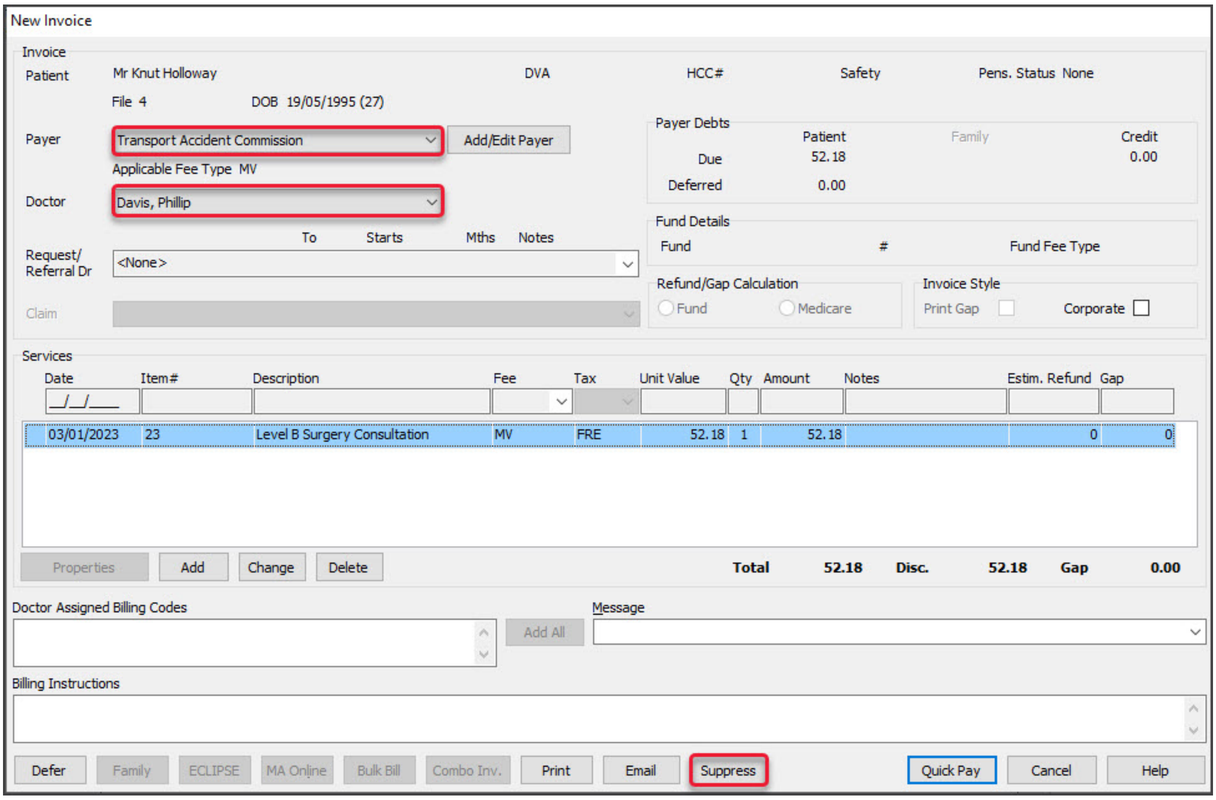
1. Go to Zedmed's **Reception** tab.
2. Select **Patients** or **Waiting Room** then locate the patient and open their record.
3. Select **Bill.**
   - If you are billing from the Waiting Room (after the consultation) right-click the patient to select Bill.
   - If you are billing from the Patient Record, select **Bill** from the top menu.

   The **New Invoice** screen (shown below) will open.
4. Check the **Payer** is the 3rd party and that the **Doctor** fields contain the correct information
5. Add the service items to the invoice.

   To add items for invoices raised from the **Waiting Room**, select **Add All** to add the code/s in the **Doctor Assigned Billing Codes** box.

   To add items **manually**, enter the service's **item code** into the **Item#** field, then press **Tab** to populate the other fields.
6. Select **Add** to move each item to the display area.
   - To modify a service, select it and select **Change**. This will place the service into the editable fields.
   - To delete a service, select it and select **Change**, then select **Delete**.
   - To print the invoice, select **Print**.
7. Select **Suppress** to save and close the invoice.

   The invoice has been created and can now be sent to the 3rd party for payment.



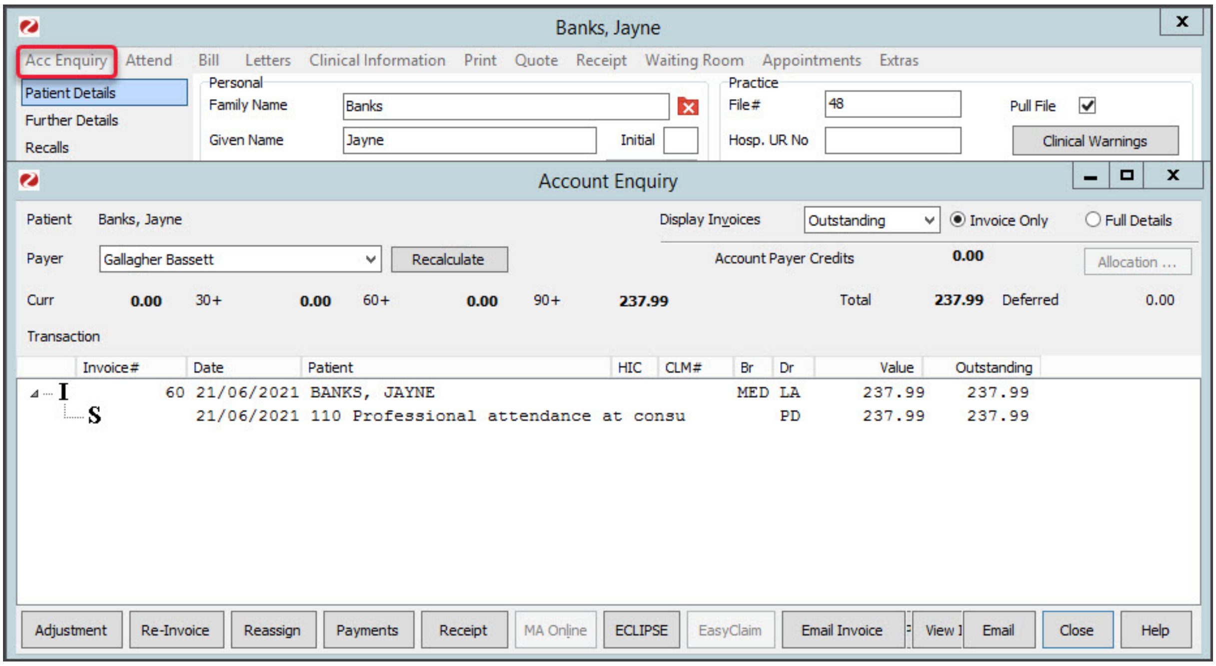
Verifying an invoice

Once the invoice has been created, you can check it in the **Account Enquiry** screen.

To check the 3rd party invoice:

1. From the patient's record, select **Acc Enquiry** from the top menu.
2. Review the **Acc Enquiry** screen.

   The invoice will show with an amount **Outstanding**.



Adding claims details for WorkCover

Scenario 1 - Claims details added before creating the invoice

This process automatically links the claim's details to the invoice.

1. Open the patient's details.
2. Select **Add** under **Fund** to open the **Account Payer Selector**.
3. Select **3rd Party** payer.
4. Click **Select** to open the **Find Account Payer** screen.
5. Enter the account payer and select the account payer from the results.
6. Select **Close** to save and exit.
7. Select **Claims** under **Fund** to open the **Claim Details** screen.
8. Select the **Account Payer**.
9. Enter accident date and claim details.
10. Select **Close** to save and exit.
11. Bill the patient as normal from the **Bill** menu.

The claim details will be linked to the invoice.

Scenario 2 - Invoice created before adding claims details

This process manually links the claim's details to the invoice.

1. Open the patient's details.
2. Create an invoice as normal and suppress.
3. Select **Add** under **Fund** to open the **Account Payer Selector**.
4. Select **3rd Party** payer.
5. Click **Select** to open the **Find Account Payer** screen.
6. Select **Claims** under **Fund** to open the **Claim Details** screen.
7. Select the **Account Payer**.
8. Enter the accident date and claim details.
9. Select **Close** to save and exit.
10. Select **Claims** under **Fund** to open the **Claim Details** screen.
11. Select **Link invoice.**
12. Select the invoice then select **Link.**
13. Select **Close** to save and exit.