

3rd party adjustments

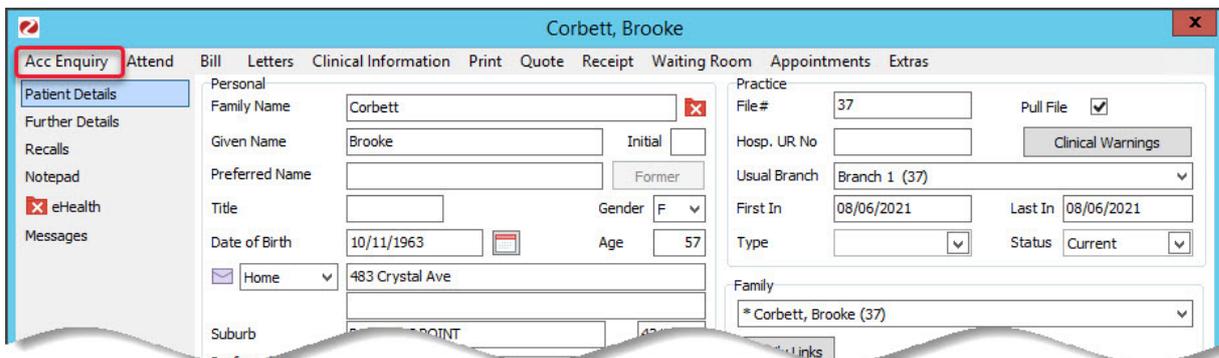
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Adjust a patient's invoice by discounting, increasing or voiding an item in that invoice. You would do this to make an invoice's value match the payment. This task will also require reversing any receipts applied to the invoice before the adjustment is made.

This guide applies to invoices paid by a 3rd party, like an employer. To adjust an invoice paid by a patient, see [Private patient adjustments](#). Adjustments for invoices paid by Medicare, DVA and health funds claims are automatically made in the Payment tab's [Payment Reconciliation](#) dialogue.

To make a 3rd party adjustment:

1. Locate and [open the patient's record](#).
2. Select the **Acc Enquiry** menu.



The screenshot shows a software interface for a patient record titled "Corbett, Brooke". A red box highlights the "Acc Enquiry" menu item in the top navigation bar. Below the navigation bar, there are several tabs: "Patient Details", "Recalls", "Notepad", "eHealth", and "Messages". The "Patient Details" tab is active, showing a form with fields for "Family Name" (Corbett), "Given Name" (Brooke), "Date of Birth" (10/11/1963), "Gender" (F), "Age" (57), and "Address" (483 Crystal Ave). On the right side, there is a "Practice" section with fields for "File#" (37), "Hosp. UR No", "Usual Branch" (Branch 1 (37)), "First In" (08/06/2021), "Last In" (08/06/2021), "Type", and "Status" (Current). There is also a "Family" dropdown menu showing "* Corbett, Brooke (37)".

The **Account Enquiry** screen (shown below) will open and display the patient's bills.

Each bill is divided into 3 parts: the **invoice** indicated by an **I**, the **service** indicated by an **S**, and the **receipt** indicated by an **R**.

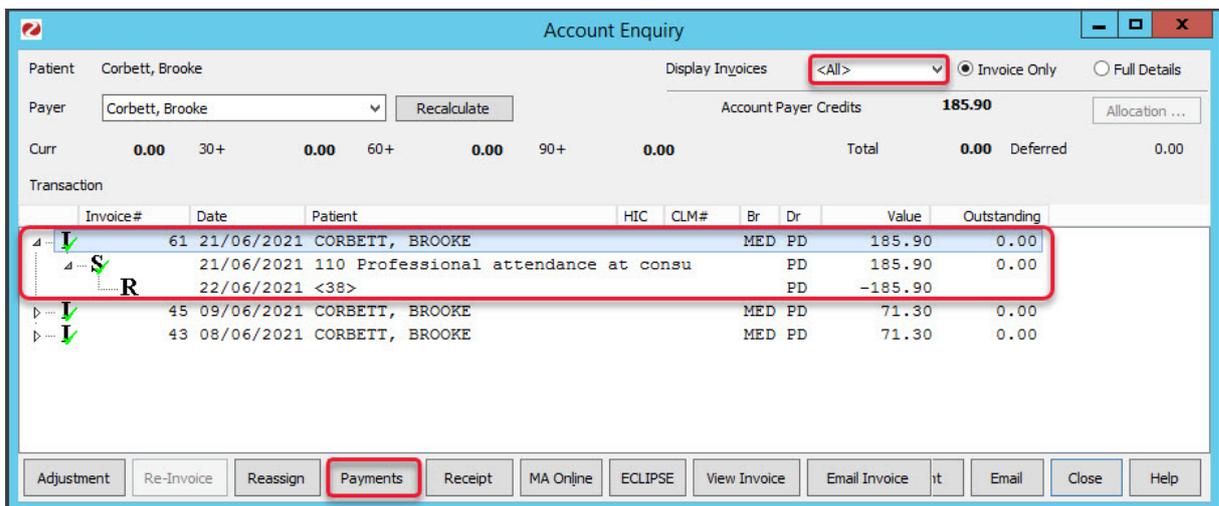
3. In the **Display Invoices** field, select **All**.

Reverse any receipts

The invoice will usually be fully or partially receipted - indicated by an **R**. The receipt must be reversed before the adjustment can be made. The next steps show how to reverse the receipt (first the allocation and then the payment).

4. Select the invoice to be adjusted.

Use the invoice number to confirm it's the correct one.



5. Select **Payments**

The **Payment Enquiry** screen will open.

6. Select the receipt.

Use the receipt number to confirm it's the right one.

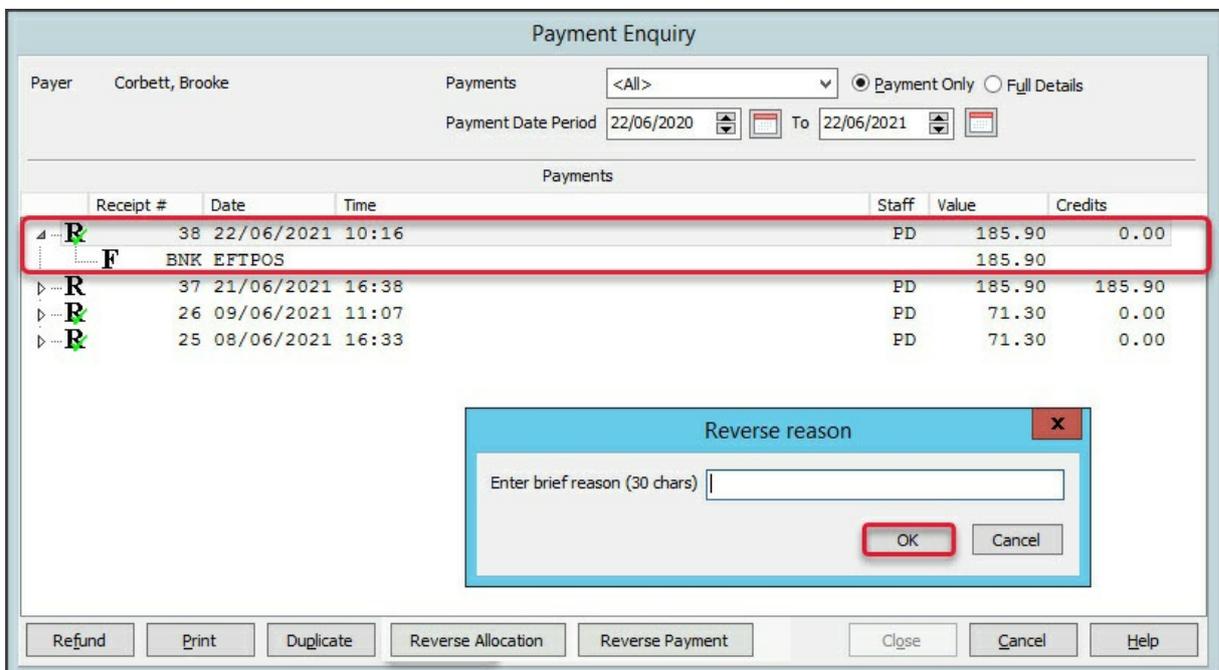
7. Select **Reverse Allocation**.

Select **Yes** when prompted to confirm. It will create a credit next to the receipt.

8. Select **Reverse Payment**

You will be prompted to confirm.

- When you select **Yes**, you will be prompted to enter a season for the Reversal.
- Enter the reason and **OK** it will cancel the payment for the receipt.



The receipt will be marked with a red cross and a reversal line will appear.

Payment Enquiry

Payer: Corbett, Brooke Payments: <All> Payment Only Full Details

Payment Date Period: 22/06/2020 To 22/06/2021

Payments						
Receipt #	Date	Time	Staff	Value	Credits	
 38	22/06/2021	10:16	PD	0.00	0.00	
BNK EFTPOS						
 22/06/2021	REVERSAL Incorrect amount		PD	-185.90		
 37	21/06/2021	16:38	PD	185.90	185.90	
 26	09/06/2021	11:07	PD	71.30	0.00	
 25	08/06/2021	16:33	PD	71.30	0.00	

Buttons: Refund, Print, Duplicate, Reverse Allocation, Reverse Payment, **Close**, Cancel, Help

9. Select **Close** to save and exit.

Back on the **Account Enquiry** screen

The green tick has been removed from the invoice, indicating the receipt's been reversed.

Make the adjustment

10. Select the invoice then select **Adjustment**.

The **Adjustment** screen (shown below) will open with 4 options to choose from:

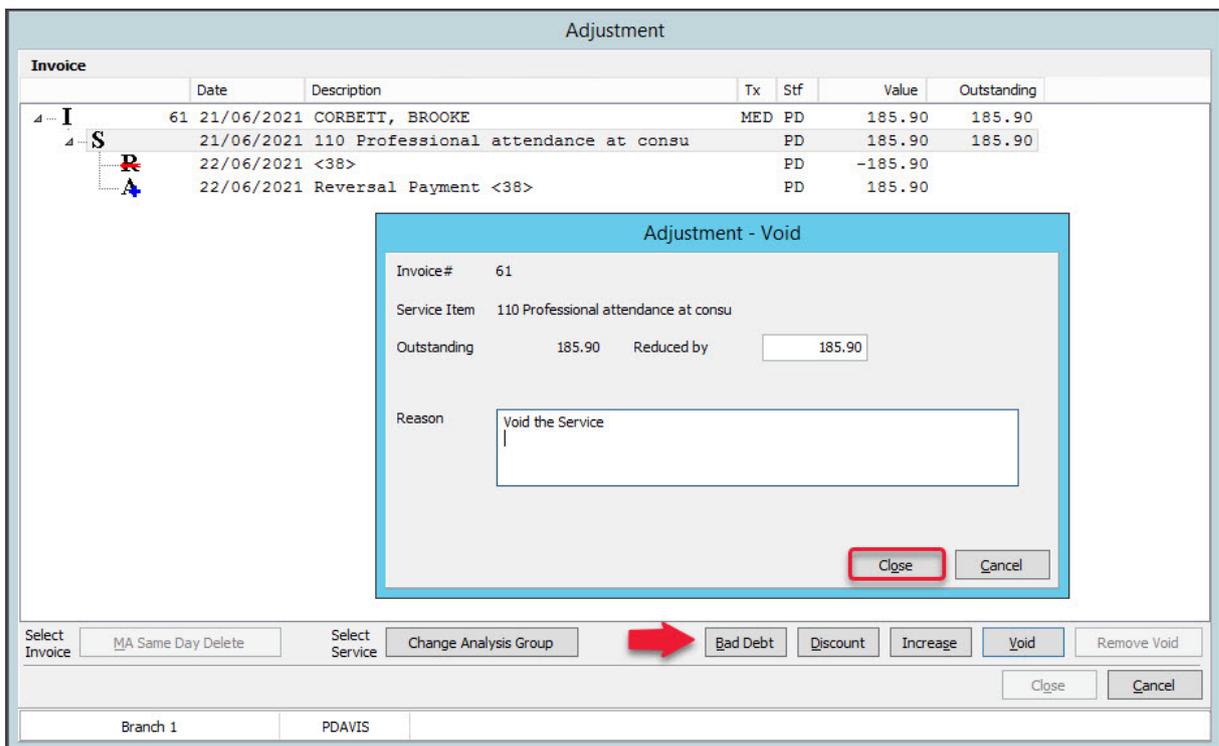
- **Bad Debt** - Reduces the value of an item or invoice to a lower value (normally zero) as a result of an Account Payer failing to pay their debt.
- **Discount** - Writes off part of an invoice when the practice gives prompt payment discounts or if the patient was overcharged. We recommend applying a discount before receipting the patient's payment, as the final receipt will then print with a zero balance outstanding.
- **Increase** - Allows the value of an item to be increased - usually when a patient does not pay for a bill "on the day" and does not qualify for their prompt payment discount.
- **Void** - Sets the value of an item or all the items on an invoice to zero. Used when you want to cancel all of a service, which was created in error.

11. Select the service to activate the adjustment options.

12. Select the type of adjustment: **Bad Debt, Discount, Increase or Void**.

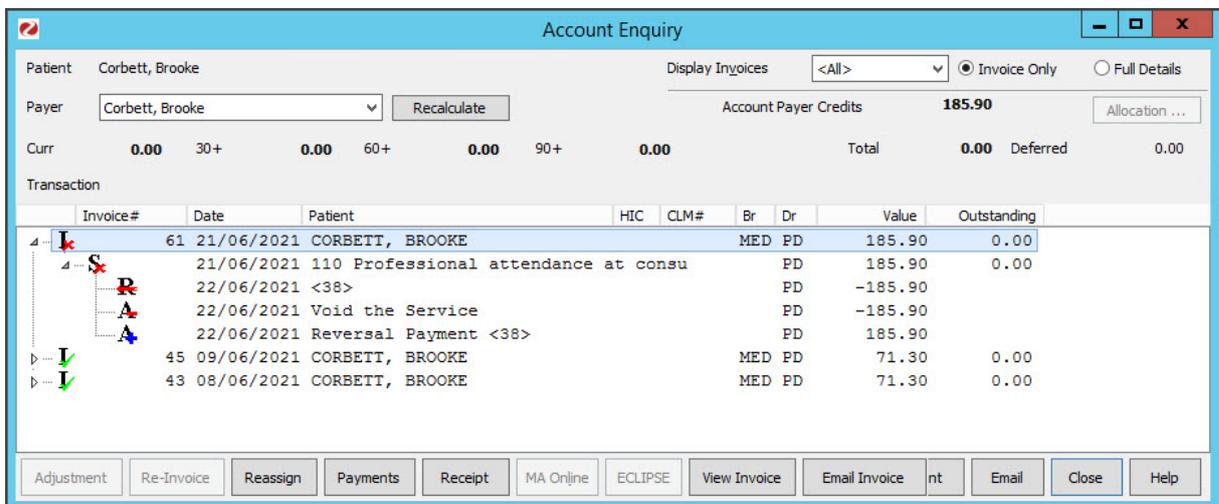
You will now see an adjustment line **A** on the Adjustment screen

13.



An **Adjustment** pop-up will prompt you to provide a reason for the adjustment. This reason will be attached to the invoice.

14. Select **Close** on the **Adjustment** screen.



Please note:

- Selecting I (Invoice) will activate the **MA Same Day Delete** button.
- Selecting S (Service) will activate the **Change Analysis Group** and **Increase** buttons.

They will result in an **A** being attached to the service item with a "+" or "-" sign denoting whether the value of the item has been increased or reduced.

- MA Same Day Delete is for when a private patient has paid an invoice using MA Online and the claim has been sent to Medicare for a rebate. It allows you to reverse the payment, cancel the claim and void the invoice. To learn more, see [Reversing MA Online Payments](#).

