

Private patient receipting

Last Modified on 25/03/2024 7:32 am AEDT

Process a payment for a patient whose invoice was suppressed (not paid on the day of their attendance). This is called receipting because when the payment's made, the receipt needs to be allocated to the original invoice.

To receipt a private patient payment:

- 1. Locate and open the patient's record.
- 2. Select the Acc Enquiry menu.

| 2 | | Anc | lrews, John | | | | x |
|--------------------|-------------------------|-------------------------------|-------------------|-------------------|---------------|-------------------|---|
| Acc Enquiry Attend | Bill Letters Clin | nical Information Print Quote | Receipt Waiting R | oom Appoin | tments Extras | | |
| Patient Details | Personal Family Name | Apdrews | | Practice File# | 31 | | |
| Further Details | r dinny r dinc | Andrews | | 1.11~ 77 | | Point lie | _ |
| Recalls | Given Name | John | Initial | Hosp. UR No | | Clinical Warnings | |
| Notepad | Preferred Name | | Former | Usual Branch | Branch 1 (31) | | ~ |
| 🔽 eHealth | Title | | Gender M 🗸 | First In | 19/05/2021 | Last In | |
| Messages | Date of Birth | 21/08/2016 | Age 4 | Туре | ~ | Status Current | ~ |
| | Home | | | | | | |

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, which uses an R. There is no receipt in the screenshot below because it was not paid. You will need to process the payment and link its receipt to the correct invoice.

- 3. Select the invoice the patient is paying.
- 4. Select Receipt.

| 2 | | | | | | | Account | Enqu | iiry | | | | | | _ 🗆 X |
|------------|----------|--------------|--------|----------|-------------|-----------|---------|------|------|-----|---------------------------|-------------|--------|------------|----------------|
| Patient | Andrews, | John | | | | | | | | | Display In <u>v</u> oices | Outstanding | ✓ ● Ir | voice Only | O Full Details |
| Payer | Andrews, | John | | ~ | Recalculate |] | | | | | Account Pa | yer Credits | 0.00 |) | Allocation |
| Curr | 71.30 | 30+ | 0.00 | 60+ | 0.00 | 90+ | 0.00 | | | | | Total | 71.30 | Deferred | 0.00 |
| Transactio | 'n | | | | | | | | | | | | | | |
| | | Date | Desc | ription | | | | Ag | Tx | Stf | Value | Outstanding | | | |
| ⊿ I | | 47 09/06/20 | 21 AND | REWS, | JOHN | | | | MED | PD | 71.30 | 71.30 | | | |
| L | S | 09/06/20 | 21 23 | Level | B Surgery | Consulta | tion | | | PD | 71.30 | 71.30 | | | |
| | | | | | | | | | | | | | | | |
| Adjustme | ent Re- | Invoice Reas | sign | Payments | Receipt | MA Online | ECLIPSE | | | | | [| Print | Email | Close Help |

The Receipt Payment screen (shown below) will open.

5. Use the **Payments** section to select the method of payment.

The total amount to be charged is shown next to **Balance**.

6. Select Add.

The payment details will move down to the **Payments** section space.

7. Select Allocate.

| 22 | | | | | | Receipt | Payment | | | | | × | |
|--------|--------------|--------------|---------------|------------|------------------|-----------------|-------------|-----------|-------------|-----------|----------|--------|---|
| 31 | | John Andrews | | | | | | | | | | | |
| Paver | Andrews | lohn | | Due | Patient 71 30 | Family 71.30 | Deferred | Patient | Fami | ly LOO | Credits | | |
| Davage | - Indi Crisy | 50111 | | Duc | /1.50 | /1.55 | Defence | 0.0 | | | 0.00 | | |
| Format | nts | Name | | Bank | Branch | | Number | | Banklist | Amount | | | |
| | | ~ | | | ~ | | | | | / | | | |
| | Cash | 2. Cheque | 3. MC Cheque | 4.1 | Card 5. Ff | ftnos FT | 6. Direc | t Denosit | 7. Credits | Add | Change | | |
| - | | E. curder | Turne energee | | | | 2.0.00 | | 7 | | Gridinge | | |
| EFT | | | | | | | | | BNK | | 71.30 | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| | | | | | | | | Pa | yment Total | | 71.30 | | |
| | | | 0 | Family Due | | ۲ | Patient Due | Am | ount Due | | 71.30 | | |
| L | | | | | | | | Ba | ance | | 0.00 | 1 | |
| | | | | | | | | | | | | | |
| Comb | | Fred | Allerate | | | | | | | | | Consel | |
| Comp | .vnr o | Email | Allocate | | | | | | | | | Cancel | 1 |

The payment will be processed and the Allocation screen will open.

8. Select the invoice the payment is for.

9. Select Fully Receipt.

The receipt will be allocated to the bill (adding the R) as shown below.

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

| | | | All | ocation | | | | | x | | | |
|----------------|---------------|----------|--------------------|--|---------|--------|----|---------------------------|-------------|--|--|--|
| Payer Andrews, | John | | | Account Payer Credits 71.30 On 1 Payment | | | | | | | | |
| Receipt # | 27 On 09/06/2 | ed 71.3 | 30 Unallocated Pay | /ment | 7 | 1.30 | | Invoice Only Full Details | | | | |
| | | | Tra | insaction | | | | | | | | |
| Invoice# | Date | Patient | | HIC | CLM# | Br | Dr | Value | Outstanding | | | |
| ⊿ I 47 | 09/06/2021 | ANDREWS, | JOHN | | | MED | PD | 71.3 | 0 71.30 | | | |
| S | 09/06/2021 | 23 Level | B Surgery | Consultation | | | PD | 71.3 | 0 71.30 | | | |
| 4 L 47 | 09/06/2021 | ANDREWS | JOHN | | | MED | PD | 71 3 | 0.00 | | | |
| | 09/06/2021 | 23 Level | B Surgery | Consultation | | 1100 | PD | 71.3 | 0.00 | | | |
| R | 09/06/2021 | <27> | 2 Dargerj | | | | PD | -71.3 | 0 | | | |
| | | | | | | | | | | | | |
| Value 71.30 | Allocated | 0.00 | Outstanding | 71.30 | Fully R | eceipt | Pa | artly Receipt | | | | |
| | | | | | Clo | se | | Cancel | Help | | | |
| Branch 1 | | PDAVIS | | | | | | | | | | |

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