

# Reversing MA Online payments

Last Modified on 17/01/2024 1:04 pm AEDT

If a private patient has paid an invoice using MA Online, and the claim has been sent to Medicare for a rebate, you can reverse the payment, cancel the claim and then void the invoice if an error was made.

To cancel an MA Online invoice and claim:

1. **Open the patient's record.**
2. Select the **Acc Enquiry** menu.

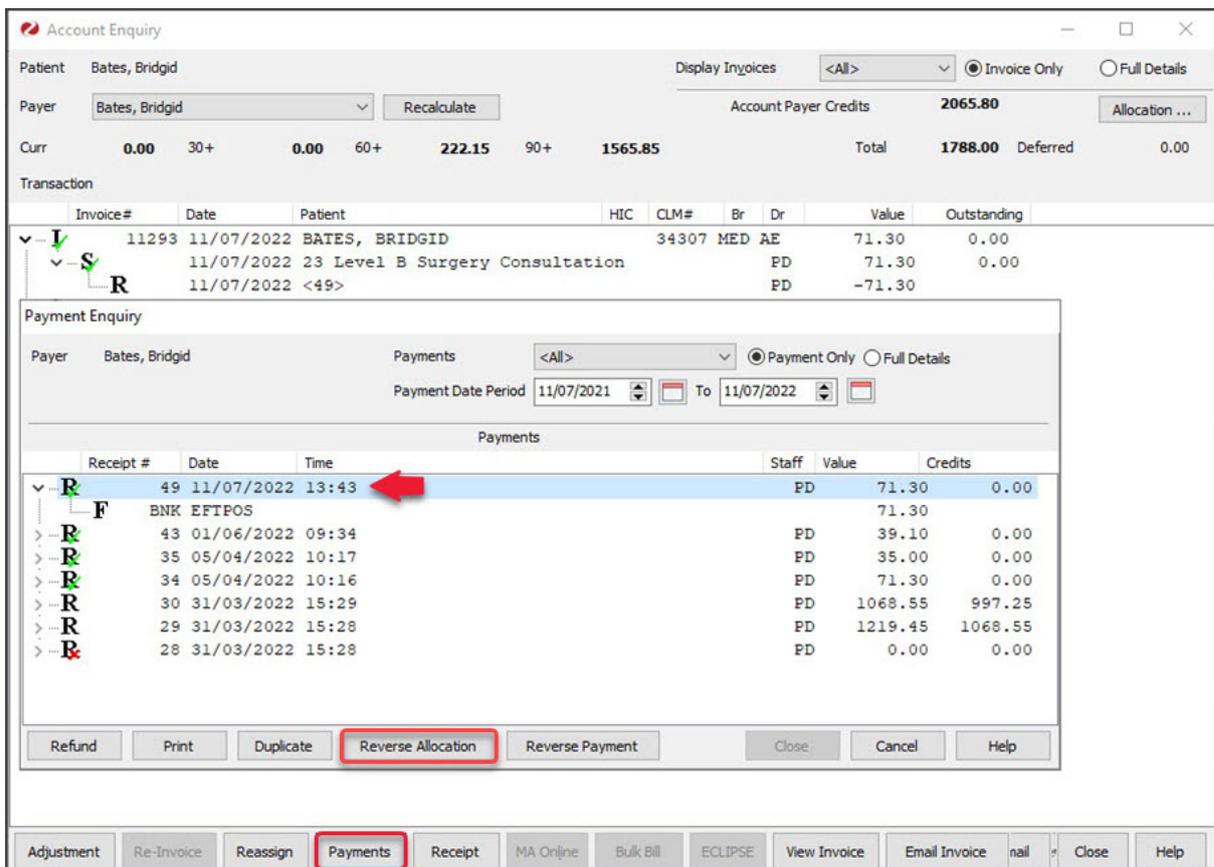
The **Account Enquiry** screen will open.

3. Select the invoice to be adjusted.

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

4. Select **Payments** to open the **Payment Enquiry** screen shown below.
5. Select the receipt.
6. Select **Reverse Allocation**.
7. Provide a reason and confirm.

This will reverse the allocation and add an amount to the Credits column equal to the Value.



**Account Enquiry**

Patient: Bates, Bridgid  
 Payer: Bates, Bridgid  
 Account Payer Credits: 2065.80  
 Curr: 0.00 30+ 0.00 60+ 222.15 90+ 1565.85  
 Total: 1788.00  
 Deferred: 0.00

Invoice#	Date	Patient	HIC	CLM#	Br	Dr	Value	Outstanding
11293	11/07/2022	BATES, BRIGID		34307	MED	AE	71.30	0.00
	11/07/2022	23 Level B Surgery Consultation				PD	71.30	0.00
	11/07/2022	<49>				PD	-71.30	

**Payment Enquiry**

Payer: Bates, Bridgid  
 Payments: <All>  
 Payment Date Period: 11/07/2021 To 11/07/2022

Receipt #	Date	Time	Staff	Value	Credits
49	11/07/2022	13:43	PD	71.30	0.00
				71.30	
43	01/06/2022	09:34	PD	39.10	0.00
35	05/04/2022	10:17	PD	35.00	0.00
34	05/04/2022	10:16	PD	71.30	0.00
30	31/03/2022	15:29	PD	1068.55	997.25
29	31/03/2022	15:28	PD	1219.45	1068.55
28	31/03/2022	15:28	PD	0.00	0.00

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

Navigation: Adjustment, Re-Invoice, Reassign, **Payments**, Receipt, MA Online, Bulk Bill, ECLIPSE, View Invoice, Email Invoice, nail, Close, Help

Once the Reverse Allocation is complete, you can reverse the payment (receipt). However, if you want to use the same receipt on another invoice, for example, an invoice that replaces this one, do not perform the

**Reverse Payment step.**

8. Check the invoice is still selected,
9. Select **Reverse Payment**.

If the payment was taken using Tyro the Tyro Adapter will open on the workstation, and the Tyro terminal will provide prompts for the patient. The patient enters their password into the terminal.

10. Provide a reason and confirm

This will unreceipt the invoice.

The screenshot shows the 'Account Enquiry' window for patient 'Bates, Bridgid'. The 'Transaction' table lists several items, including a Level B Surgery Consultation on 11/07/2022 with a value of 71.30 and an outstanding amount of 0.00. Below this, the 'Payment Enquiry' window is open, showing a list of payments. The payment on 11/07/2022 at 13:43, labeled 'REVERSAL', is highlighted with red arrows. At the bottom of the 'Payment Enquiry' window, the 'Reverse Payment' button is highlighted with a red box. The main window also has a 'Reverse Payment' button highlighted with a red box at the bottom.

Invoice#	Date	Patient	HIC	CLM#	Br	Dr	Value	Outstanding
11293	11/07/2022	BATES, BRIDGID		34307	MED	AE	71.30	0.00
	11/07/2022	23 Level B Surgery Consultation				PD	71.30	0.00
	11/07/2022	<49>				PD	-71.30	

Receipt #	Date	Time	Staff	Value	Credits
49	11/07/2022	13:43	PD	0.00	0.00
	11/07/2022	REVERSAL	PD	-71.30	
43	01/06/2022	09:34	PD	39.10	0.00
35	05/04/2022	10:17	PD	35.00	0.00
34	05/04/2022	10:16	PD	71.30	0.00
30	31/03/2022	15:29	PD	1068.55	997.25
29	31/03/2022	15:28	PD	1219.45	1068.55
28	31/03/2022	15:28	PD	0.00	0.00

Now that the payment has been reversed, you can cancel the Medicare claim and void the invoice.

11. Check that the invoice you reversed the payment on is still selected in **Account Enquiry**.
12. Select **Adjustment**.

This will open the **Adjustment** screen.

13. Select **MA Same Day Delete**.
14. Select a reason then select **OK**.
15. Select **OK** to the message that confirms the claim was deleted.

This tells Medicare to cancel the claim.

Account Enquiry

Patient: Bates, Bridgid      Display Invoices: <All>      Invoice Only (selected)      Full Details

Payer: Bates, Bridgid      Recalculate      Account Payer Credits: 2065.80      Allocation ...

Curr: 71.30    30+    0.00    60+    222.15    90+    1565.85      Total: 1859.30    Deferred: 0.00

Transaction	Invoice#	Date	Patient	HIC	CLM#	Br	Dr	Value	Outstanding
▼ - I	11293	11/07/2022	BATES, BRIGID		34307	MED	AE	71.30	71.30
▼ - S		11/07/2022	23 Level B Surgery Consultation				PD	71.30	71.30
R		11/07/2022	<49>				PD	-71.30	
A		11/07/2022	Reversal Allocation <49>				PD	71.30	

Adjustment

Invoice	Invoice#	Date	Patient	HIC	CLM#	Br	Dr	Value	Outstanding
▼ - I	11293	11/07/2022	BATES, BRIGID		34307	MED	AE	71.30	71.30
▼ - S		11/07/2022	23 Level B Surgery Consultation				PD	71.30	71.30
R		11/07/2022	<49>				PD	-71.30	
A		11/07/2022	Reversal Allocation <49>				PD	71.30	

Pick a value

This invoice has been sent to HIC as a Real Time Patient Claim today. If you want to delete it, please pick a reason from the combo box, then click OK button.

Pick a reason

OK      Cancel

Select Invoice: MA Same Day Delete      Select Service: Change Analysis Group      Bad Debt      Discount      Increase      Void      Remove Void

Close      Cancel

Branch 1      PDAVIS

Adjustment    Re-Invoice    Reassign    Payments    Receipt    MA Online    Bulk Bill    ECLIPSE    View Invoice    Email Invoice    Close    Help

You can now void the invoice as explained in the next step.

If there are any problems voiding the invoice, close and reopen the Adjustment screen.

16. Select the service item.
17. Select **Void**.

The invoice will be voided.

18. Select **Close** to exit.

**Account Enquiry** - □ ×

Patient: Bates, Bridgid Display Invoices: <All>  Invoice Only  Full Details

Payer: Bates, Bridgid Recalculate Account Payer Credits: **2065.80** Allocation ...

Curr: **71.30** 30+ **0.00** 60+ **222.15** 90+ **1565.85** Total: **1859.30** Deferred: 0.00

Transaction

Invoice#	Date	Patient	HIC	CLM#	Br	Dr	Value	Outstanding
11293	11/07/2022	BATES, BRIGID		34307	MED	AE	71.30	71.30
S	11/07/2022	23 Level B Surgery Consultation				PD	71.30	71.30
R	11/07/2022	<49>				PD	-71.30	
A	11/07/2022	Reversal Allocation <49>				PD	71.30	

Adjustment

**Invoice**

Invoice#	Date	Description	Tx	Stf	Value	Outstanding
11293	11/07/2022	BATES, BRIGID	34307	MED AE	71.30	71.30
S	11/07/2022	23 Level B Surgery Consultation			71.30	71.30
R	11/07/2022	<49>			-71.30	
A	11/07/2022	Reversal Allocation <49>			71.30	

Select Invoice: MA Same Day Delete Select Service: Change Analysis Group Bad Debt Discount Increase Void Remove Void

Close Cancel

Branch 1      PDAVIS

---

Adjustment Re-Invoice Reassign Payments Receipt MA Online Bulk Bill ECLIPSE View Invoice Email Invoice mail Close Help