

Create a quote

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Create a quote for a patient's services that can be saved, updated and used to create an invoice for the payer.

Create a quote

To create a new quote:

- 1. Open the patient's record.
- 2. Select **Quote** from the top menu.

The New Invoice screen will open.

- 3. In the **Payer** field, select the payer the quote is for.
- 4. Add the service's item code into the Item# field, then press Tab to populate the other fields.
- 5. Select Add to move the item to the Services section.
- 6. Repeat steps 4 and 5 to add any additional services.
- 7. Select **Suppress** to save the quote.

Use **Send to Patient** to email a copy of the quote.

Use **Print** to print a copy of the quote.

			Hollow	ay, Knut					L	x	
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View and update quotes

To access your quotes:

- 1. Open the patient's record.
- 2. Select Acc Enquiry from the top menu.

The Account Enquiry screen will open.

- 3. From the **Display Invoices** field, select **Quotes**
- 4. From the Payer field, select All.
- 5. Select the invoice.
- 6. Select Re-Quote.
- 7. Make the required updates:
 - 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**.
- 8. Select **Suppress** to save the changes.

If you **Print** or **Email** a saved quote, it will say **Duplicate Quotation** on the quote. If you do not want this text, create another quote and print it before you close it.

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	S	06/01/2023	23 Level B	Surgery C	onsultati	ion			PD	39.75	39.75	
	S	06/01/2023	109 Initia	l speciali	st ophtha	almol	ogi		PD	175.90	175.90	
Bill	Re-Qu	Reassign	Payments	Receipt	MA Online	Bulk I	Bill E	CLIPSE		Print	Email	Close Help

Bill from a quote

Use a quote to raise an invoice:

- 1. Open the patient's record.
- 2. Select Acc Enquiry from the top menu.

The Account Enquiry screen will open.

- 3. From the Display Invoices field, select Quotes
- 4. From the Payer field, select All.
- 5. Select the invoice.
- 6. Select Bill.

This will use the quote to raise an invoice. The original quote will still stay in the system.

7. Process the invoice and payment for the payer. For example, as a private patient or 3rd party.

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	- 5	06/01/2023	109 Initi	al special	ist ophtha	almol	ogi		PD	175.90	175.90	

Link a quote to a surgical booking

You can add a quote directly to a surgical procedure as explained in Step 12 of the Book a Surgical Procedure guide.

Use the **Bill from a quote** steps above, if you want to use the quote liked to the surgical procedure to invoice the payer.

0			A	dd Surgical Proc	edure	_ 🗆 X	
Checklist Patient Details Procedure Notes	Services Add Date	d from Existi Iten	ng Quote	Add from New Que	Notes		
Surgery Details		2			Select Quote	_	D X
	B	Below are the	e quotes for Ho	lloway, Knut with Phillip	Davis. Please select a quote	to associate with the surgical proce	dure.
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		± 40151	6/01/2023	Holloway, Knut	Medicare	Phillip Davis	18.20
						Select	Cancel