

# 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.

**New Invoice**

Invoice  
 Patient Mr Knut Holloway DVA HCC# Safety Pens. Status None  
 File 4 DOB 19/05/1995 (27)

Payer **Transport Accident Commission** Add/Edit Payer  
 Applicable Fee Type MV

Doctor **Davis, Phillip**

Request/Referral Dr <None>

Claim

Payer Debts  
 Patient Due 52.18 Family Credit 0.00  
 Deferred 0.00

Fund Details  
 Fund # Fund Fee Type

Refund/Gap Calculation Invoice Style  
 Fund  Medicare Print Gap  Corporate

Date	Item#	Description	Fee	Tax	Unit Value	Qty	Amount	Notes	Estim. Refund	Gap
03/01/2023	23	Level B Surgery Consultation	MV	FRE	52.18	1	52.18		0	0

Properties Add Change Delete **Total 52.18 Disc. 52.18 Gap 0.00**

Doctor Assigned Billing Codes Message

Billing Instructions

Defer Family ECLIPSE MA Online Bulk Bill Combo Inv. Print Email **Suppress** Quick Pay Cancel Help

## 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**.

**Banks, Jayne**

**Acc Enquiry** Attend Bill Letters Clinical Information Print Quote Receipt Waiting Room Appointments Extras

Patient Details Personal  
 Family Name Banks Practice File# 48 Pull File   
 Given Name Jayne Initial Hosp. UR No Clinical Warnings

**Account Enquiry**

Patient Banks, Jayne Display Invoices Outstanding  Invoice Only  Full Details

Payer Gallagher Bassett Recalculate Account Payer Credits **0.00** Allocation ...

Curr	30+	60+	90+	Total	Deferred
0.00	0.00	0.00	0.00	237.99	0.00

Transaction

Invoice#	Date	Patient	HIC	CLM#	Br	Dr	Value	Outstanding
4-I	21/06/2021	BANKS, JAYNE			MED	LA	237.99	237.99
S	21/06/2021	110 Professional attendance at consu				PD	237.99	237.99

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

## 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 **3<sup>rd</sup> 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 **3<sup>rd</sup> 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.
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