Private patient 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 the patient (or a family member). To adjust an invoice paid by a third party, see the 3rd Party adjustments guide. Adjustments for invoices paid by Medicare, DVA and health funds claims are automatically made in the Payment tab's Payment Reconciliation dialogue.

Make a private patient billing adjustment

To make a private patient adjustment:

1. Locate and open the patient's record.
2. Select the **Acc Enquiry** menu.
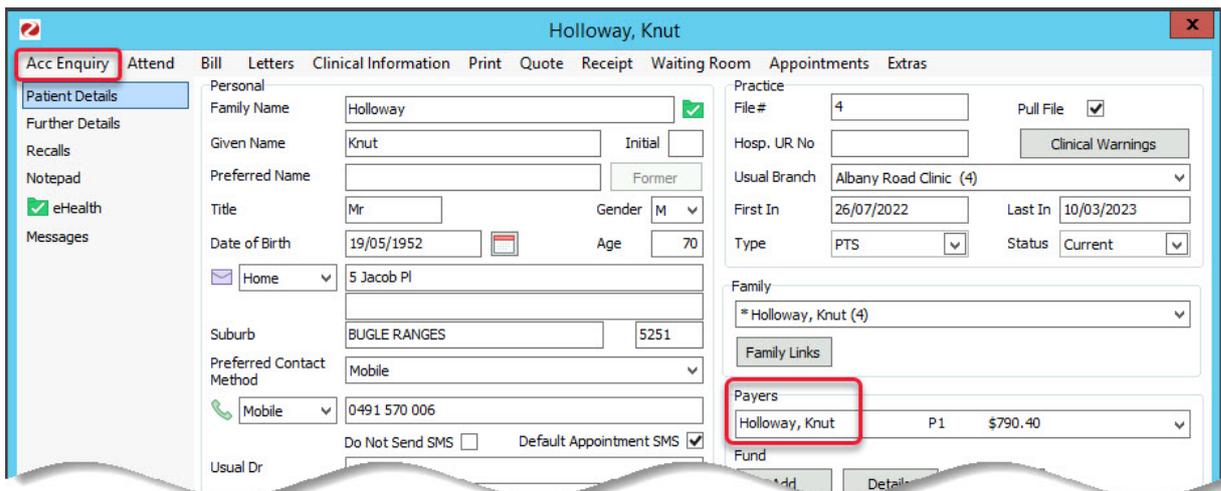
The **Account Enquiry** screen (shown below) will open and display the patient's bills.

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** drop-down 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).
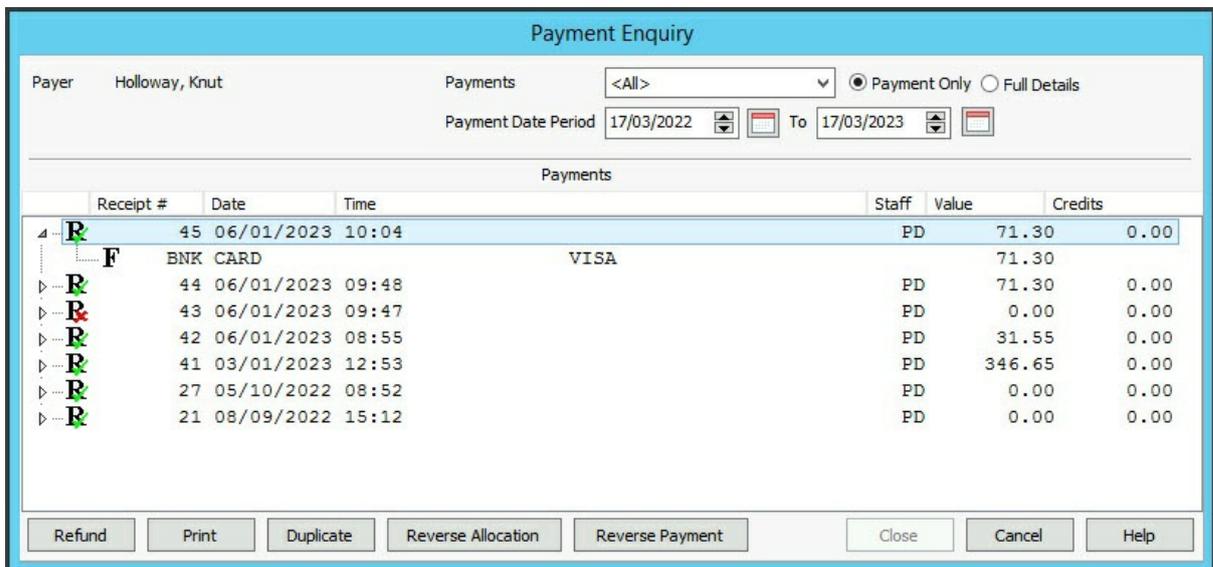
4. Select the invoice to be adjusted.

Use the invoice number to confirm it's the correct one.
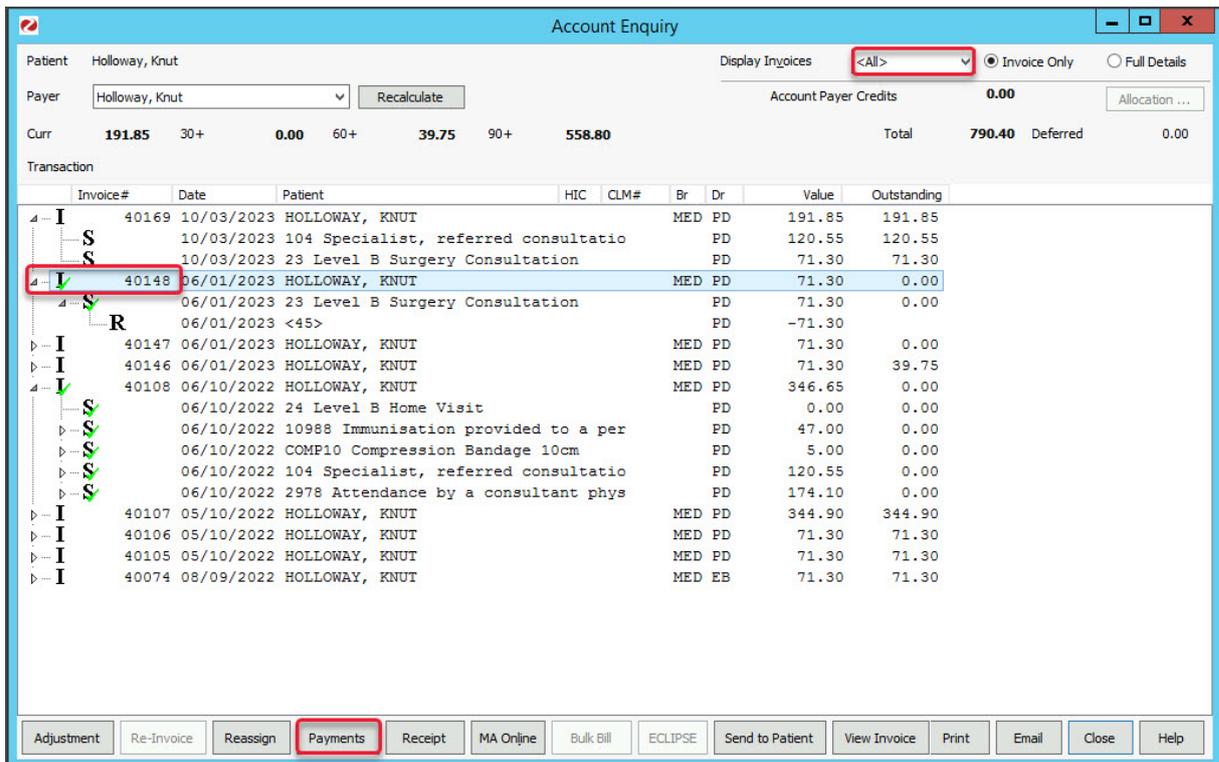
5. Select **Payments.**

   The **Payment Enquiry** screen will open.

6. Select the receipt.

   Use the receipt number to confirm it's the correct 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.

If the payment was taken using Tyro:
   a. The Tyro Adapter will open on the workstation, and the Tyro terminal will provide prompts for the patient.
   b. The patient will enter their password into the terminal.
   c. Enter a reason for the refund into the Zedmed pop-up, and select **OK**.

   The payment will be refunded to the card and you can now make an adjustment.

Refund

Amount $71.30

Total $71.30

Swipe / Insert Card. Refund $71.30

Verifying password
Enter refund password on terminal
Incorrect refund password
Verifying password
Enter refund password on terminal

Cancel Transaction

9. Select **Close** to save the changes and exit.
10. Return to the **Account Enquiry** screen.

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

Make the adjustment

11. Select the invoice and select **Adjustment**.

    The **Adjustment** screen will open.
12. Select the service item in the invoice to be adjusted.

    The **Adjustment** button will become active.

    The **Adjustment** screen (shown below) has 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.

13. Select the service to activate the adjustment options.
14. Select the type of adjustment: **Bad Debt, Discount, Increase** or **Void**.
15. An **Adjustment** pop-up will prompt you to provide a reason for the adjustment. This reason will be attached to the invoice.
16. 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.