

Make patient payer with fund

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Add a health fund to a patient's record as a payer. This is set up by making the patient the payer and having the health fund under the patient's payer details. When the invoice is created, ECLIPSE will be the billing option and submit the claim to the fund.

Prerequisites

- If the fund does not exist in Zedmed, it must be added as per the [Create a new payer guide](#).
- The ECLIPSE schemes must also be added to any specialists, as per the [fund's ECLIPSE scheme guide](#).

To set up a patient with a health fund:

1. Locate the patient and open their record.
2. Under **Payers**, select **Add**.

The **Account Payer Selector** will open.
3. Select **Patient**.
4. Under **Fee Type**, select the health fund (the health fund's fee type).
5. Click **Select**.

The patient will be added as the payer.

6. Select the **Details** button under the patient.

The **Patient Account Status** screen will open.
7. Check that the fund's **Fee Type** is selected.
8. Under **Eclipse**, select the **Fund/Brand** and fill in the details, including:

- a. The patient's health fund member's individual **Membership number**.
- b. Optional: The patient's **UPI number**, if available. The UPI field is the patient's position on the card.
- c. Most funds do not have an **expiry date**.

9. Select **Close** to save and exit.
10. Perform a **Patient Verification** to check the information is valid for Medicare.

The fund's name will now appear below the patient.

Personal

Family Name: BLAIR
 Given Name: KYM Initial:
 Preferred Name: Former
 Title: Ms Sex at Birth: F
 Gender Identity:
 Pronouns:
 Date of Birth: 20/08/1968 Age: 57
 Home: 11 Joachim Cct
 Suburb: PENNANT HILLS 2120
 Preferred Contact Method: Home (Branch Default)
 Home:
 Do Not Send SMS Default Appointment SMS

Practice

File#: 7 Pull File
 Hosp. UR No: Clinical Warnings
 Usual Branch: Test Branch 1 (7)
 First In: 23/05/2022 Last In: 23/05/2022
 Type: Status: Current

Family

* Blair, Angelina (6)
 Family Links

Payers

	Fee	Outstanding Credit
BLAIR, KYM	IF7	\$102.95 \$0.00

Fund Bupa 2344 5688
 Add Details Claims

Patient Account Status

Patient
 Fee Type: BUPA No Gap
 Current: 0.00 Deferred: 0.00
 Eclipse
 Fund/Brand: Bupa
 Membership N°: 2344 5688 UPI:
 Fund alias given name:
 Fund alias family name:
 Expiry Date:
 Hold Account Reminder:
 Active:

Close Cancel Help

Alerts

Patient Verification Find Close Cancel