

# Add a health 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

This guide explains how to add a Health Fund to a patient. If the fund does not exist in Zedmed, it will first need to be added. If there are specialists, the fund's ECLIPSE scheme will then need to be added to each specialist's profile.

- If the fund does not exist, follow the steps in the [Create a new payer guide](#).
- If there are specialists, follow the steps to [add the fund's ECLIPSE scheme](#) to each specialist's profile

## To set up a patient with a health fund:

1. Locate the patient and open their record.

To learn more, see the [find a patient's record article](#).

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 the fund's **Fee Type** is selected.
8. Under **Eclipse**, select the **Fund/Brand** and complete fill in the details including.

- a. The patient's health fund member's individual **Membership number**.
- b. The patient's **UPI number** if they have one. The UPI field (Unique Patient Identifier) is the patient's position on the membership card (like the Individual Reference Number/IRN) on a Medicare card). Most funds do not have an expiry date.
- c. The **Fund alias given name** and the **Fund alias family name** fields.

These are the names on the fund's membership card, which may be spelled differently from the patient's Medicare card details.

9. Select **Close** to save and exit.

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

**Adamson, Liam**

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

**Patient Details**

Further Details  
Recalls  
Notepad  
 eHealth  
Messages

**Personal**  
 Family Name: Adamson   
 Given Name: Liam Initial:   
 Preferred Name:  Former:   
 Title:  Gender: M  
 Date of Birth: 13/11/2002 Age: 19  
 Home: 4 Arran Street  
 Suburb: BENOLONG 2818  
 Preferred Contact Method: Branch Default (not set)  
 Mobile:   
 Do Not Send SMS:  Default Appointment SMS:   
 Usual Dr: None

**Practice**  
 File#: C59 Pull File:   
 Hosp. UR No:  Clinical Warnings:   
 Usual Branch: Branch 1 (C59)  
 First In:  Last In:   
 Type:  Status:

**Family**  
 \* Adamson, Liam (C59)

**Payers**  
 Adamson, Liam IF10 \$0.00

**Fund Springs**

**Medicare**  
 Veteran  
 Health Care  
 Safety Net  
 Pen. Stat.  
 ATSI

**Patient Account Status**

**Patient**  
 Fee Type: Springs (STS)  
 Current: 0.00 Deferred: 0.00

**Eclipse**  
 Fund/Brand: Springs  
 Membership N°: SP3453221 UPI:   
 Fund alias given name:   
 Fund alias family name:   
 Expiry Date: 26/01/2023

**Family**  
 Current: 0.00 Deferred: 0.00

Hold Account Reminder:   
 Active: