

# 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.

			Hollowa	ay, Knut							x	
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atient Details	Personal Family Name	Holloway			actice e# 4	1		Pull File	~			
urther Details	E Contraction of the second	Knut	Initial		sp. UR No							
ecalls	Given Name	Knut							Clinical Warni	ngs		
2.0076014				Quotatio	n							
Invoice Patient	Mr Knut Holloway		DVA		HCC#		Safet	,	Pens. Status None			
	File 4	DOB 19/05/1952 (70)			Payer Debts		ots Patient		Pens. Status None			
Payer	Holloway, Knut	Ŷ	Add/Edit Payer						Family		Credit	
	Applicable Fee Type	P1			Due			598.55			0.00	
Doctor	Davis, Phillip	*			Deferred		0.00		0.00			
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Request/	<none></none>	10 50105	Piula Notes	~	Fund			#	Fund	l Fee Type		
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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.

Patient Holloway,	March.									
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ransaction										
Invoice#	Date	Patient		HIC	CLM#	Br	Dr	Value	Outstanding	
	150 06/01/20	23 HOLLOWAY, KNUT				MED	PD	215.65		
S	06/01/20	23 23 Level B Sur	gery Consultat	tion			PD	39.75	39.75	
S	06/01/20	23 109 Initial sp	ecialist ophth	halmol	.ogi		PD	175.90	175.90	

#### 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.

Display In <u>v</u> oices Quotes 🗸 💿 Invoice Only	Displ			iut	nt Holloway, K
Account Payer Credits		Recalculate	~		<all></all>
Total Deferred		90+	60+	30+	
					action
HIC CLM# Br Dr Value Outstanding	HIC CLM		Patient	Date	Invoice#
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ion PD 39.75 39.75	ation	B Surgery Consult	23 Level 1	06/01/2023	<b>S</b>
nalmologi PD 175.90 175.90	thalmologi	al specialist oph	109 Initia	06/01/2023	S

## 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.

2				A	dd Surgical Prod	cedure	_ <b>D</b> X			
Checklist Patient Details Procedure	Service		m Existing	Quote	Add from New Qu	ote				
Notes	Dat	te	Item #	Descript	ion Amount	Notes				
Surgery Details Services		0				Select Quote	L	-		x
		Below					to associate with the surgical pro	oced		
		-		Date	Patient	Account Payer	Surgeon		Value	-
			40150	6/01/2023	Holloway, Knut	Medicare	Phillip Davis		215.65	-
		+	40151 40153	6/01/2023 6/01/2023	Holloway, Knut Holloway, Knut	Medicare Medicare	Phillip Davis Phillip Davis		18.20 18.20	
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