Deactivate/activate a payer

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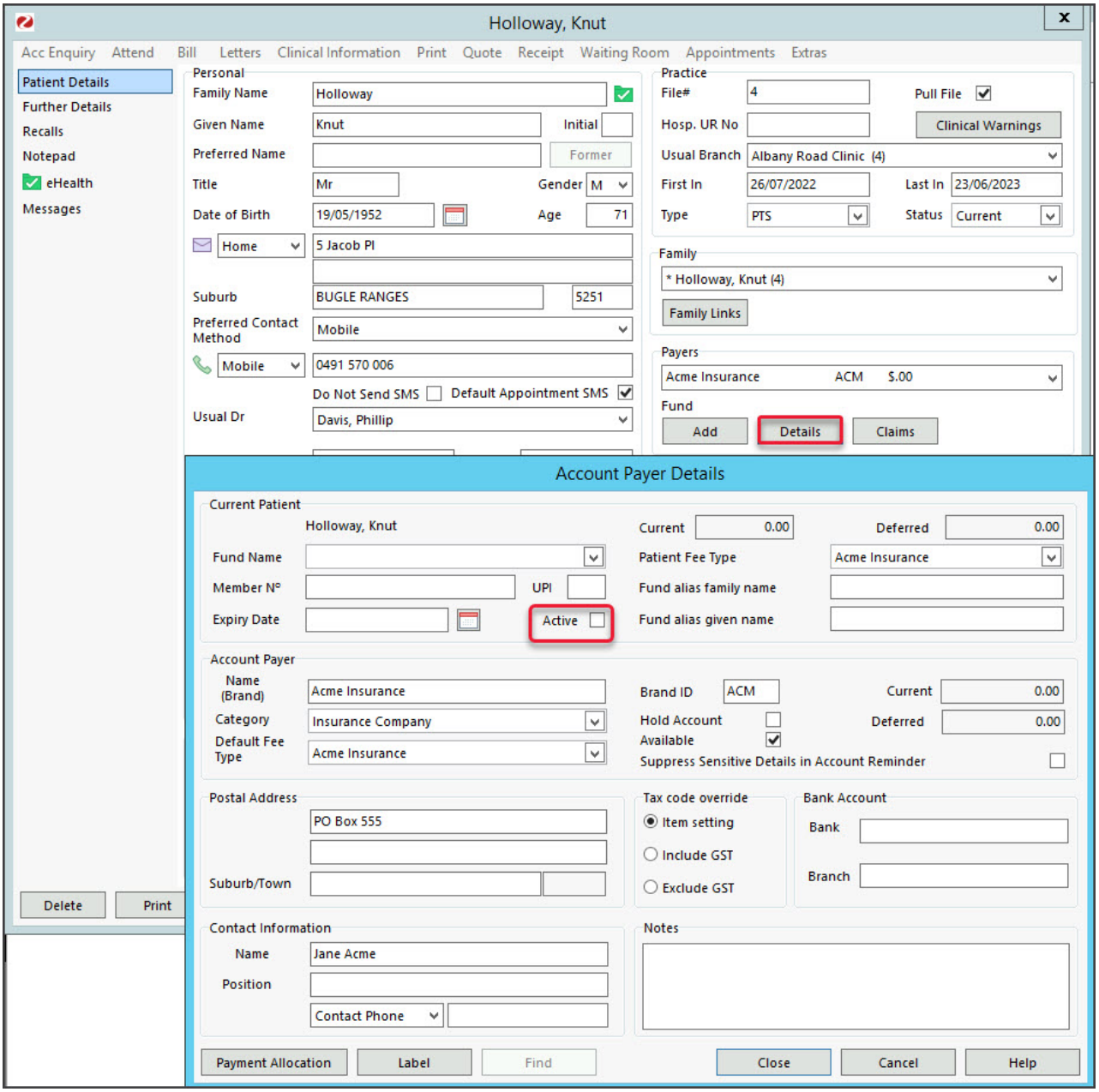
When you add a 3rd party payer to a patient, it will have **Active** ticked. By unticking Active, the payer will still be in the patient record but it will not appear as a selectable option. If required, you can reactivate that payer via the billing menu.

Deactivate a patient's payer

To deactivate a payer:

1. Open the patient record.
2. Select the payer in the **Payers** drop-down.
3. Select **Details**.
4. Remove the tick from **Active**.
5. Select **Close** the save the change.

   The payer will no longer be selectable from this screen.



Activate a patient's payer

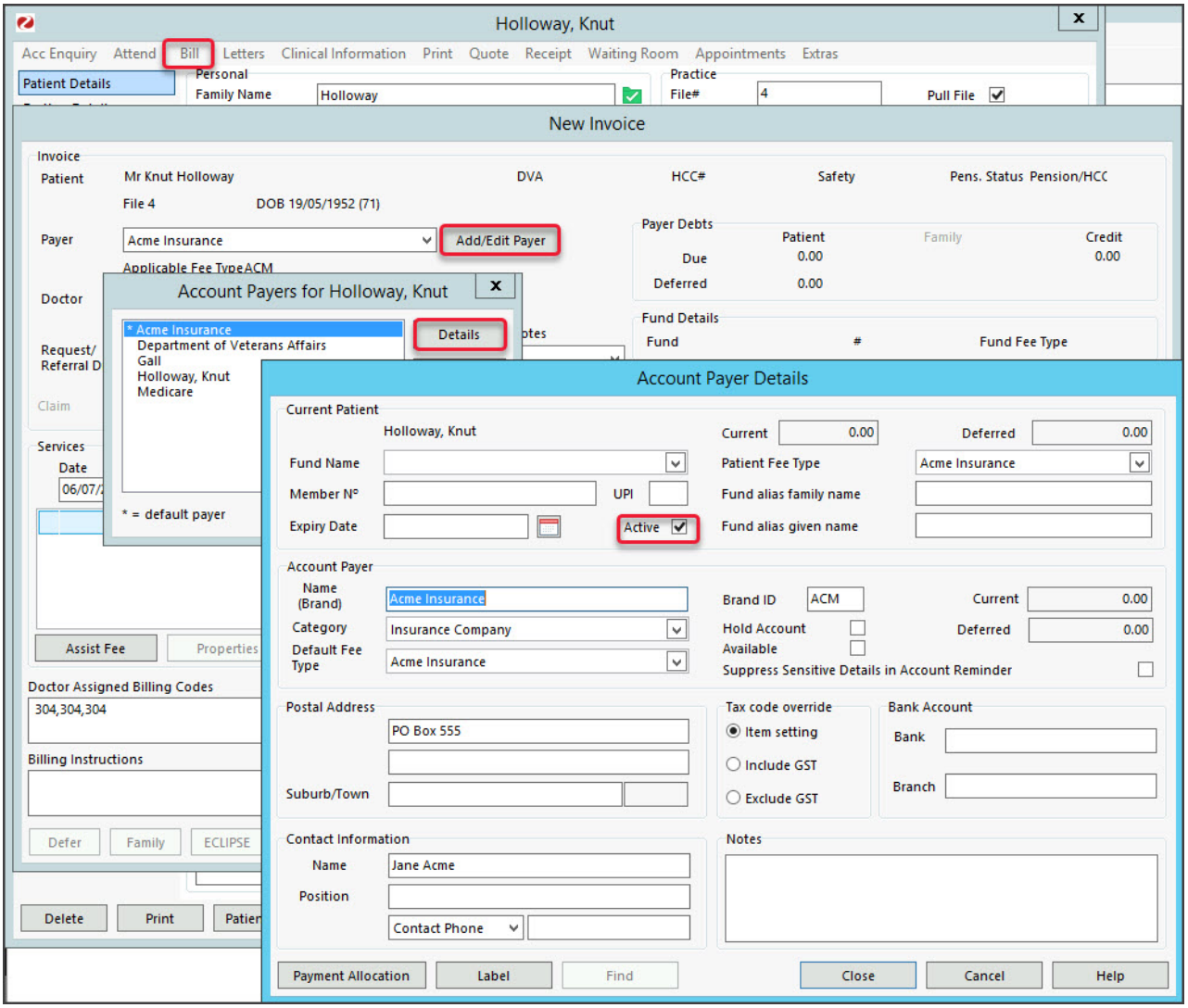
To make a payer active:

1. Open the patient record.
2. Select **Bill** from the top menu.
3. Select **Add/Edit Payer**.

   The **Account Payers** screen will open.
4. Select the payer and select **Details**.

   The **Account Payer Details** screen will open.
5. Tick the **Active** box.
6. Select **Close** the save the change.

   The payer is now selectable in the patient's record.


Holloway, Knut
Acc Enquiry
Attend
Bill
Letters
Clinical Information
Print
Quote
Receipt
Waiting Room
Appointments
Extras
Patient Details
Personal
Family Name
Holloway
Practice
File#
4
Pull File
New Invoice
Invoice
Patient
Mr Knut Holloway
DVA
HCC#
Safety
Pens. Status
Pension/HCC
File 4
DOB 19/05/1952 (71)
Payer
Acme Insurance
Add/Edit Payer
Payer Debts
Patient
Family
Credit
Due
0.00
0.00
Deferred
0.00
Doctor
Account Payers for Holloway, Knut
* Acme Insurance
Department of Veterans Affairs
Gall
Holloway, Knut
Medicare
Details
* = default payer
Fund Details
Fund
#
Fund Fee Type
Request/
Referral D
Claim
Services
Date
Assist Fee
Properties
Doctor Assigned Billing Codes
304,304,304
Billing Instructions
Defer
Family
ECLIPSE
Delete
Print
Account Payer Details
Current Patient
Holloway, Knut
Current
0.00
Deferred
0.00
Fund Name
Patient Fee Type
Acme Insurance
Member N°
UPI
Fund alias family name
Expiry Date
Active
Fund alias given name
Account Payer
Name (Brand)
Acme Insurance
Brand ID
ACM
Current
0.00
Category
Insurance Company
Hold Account
Deferred
0.00
Default Fee Type
Acme Insurance
Available
Suppress Sensitive Details in Account Reminder
Postal Address
PO Box 555
Suburb/Town
Tax code override
Item setting
Include GST
Exclude GST
Bank Account
Bank
Branch
Contact Information
Name
Jane Acme
Position
Contact Phone
Notes
Payment Allocation
Label
Find
Close
Cancel
Help