

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.

The screenshot shows a medical software interface for a patient named Holloway, Knut. The interface is divided into several sections:

- Personal Information:** Family Name (Holloway), Given Name (Knut), Preferred Name, Title (Mr), Gender (M), Date of Birth (19/05/1952), Age (71), Home address (5 Jacob Pl), Suburb (BUGLE RANGES), Preferred Contact Method (Mobile), Mobile number (0491 570 006), Usual Dr (Davis, Phillip).
- Practice Information:** Practice File# (4), Hosp. UR No, Usual Branch (Albany Road Clinic (4)), First In (26/07/2022), Last In (23/06/2023), Type (PTS), Status (Current).
- Account Payer Details:**
 - Current Patient:** Holloway, Knut, Current (0.00), Deferred (0.00), Patient Fee Type (Acme Insurance), Fund Name, Member N°, Expiry Date, UPI, Active checkbox (highlighted in red), Fund alias family name, Fund alias given name.
 - Account Payer:** Name (Acme Insurance), Brand ID (ACM), Category (Insurance Company), Default Fee Type (Acme Insurance), Brand ID (ACM), Current (0.00), Hold Account, Available, Suppress Sensitive Details in Account Reminder.
 - Postal Address:** PO Box 555, Suburb/Town.
 - Tax code override:** Item setting (selected), Include GST, Exclude GST.
 - Bank Account:** Bank, Branch.
 - Contact Information:** Name (Jane Acme), Position, Contact Phone.
 - Notes:** Empty text area.

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** to 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**

Applicable Fee Type ACM

Doctor Department of Veterans Affairs **Details**

Request/Referral D Gall Holloway, Knut Medicare

Claim

Services Date 06/07/

* = default payer

Assist Fee Properties

Doctor Assigned Billing Codes 304,304,304

Billing Instructions

Defer Family ECLIPSE

Delete Print Patient

Payer Debts

	Patient	Family	Credit
Due	0.00		0.00
Deferred	0.00		

Fund Details

Fund	#	Fund Fee Type

Account Payers for Holloway, Knut

Acme Insurance **Details**

Department of Veterans Affairs
 Gall
 Holloway, Knut
 Medicare

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