

Deferred billing (pay later)

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Create deferred invoices for patients and third parties and bill them at the end of each month. The invoices will not be treated as outstanding amounts until they are processed using the Print Deferred Bills feature.

Deferring an invoice

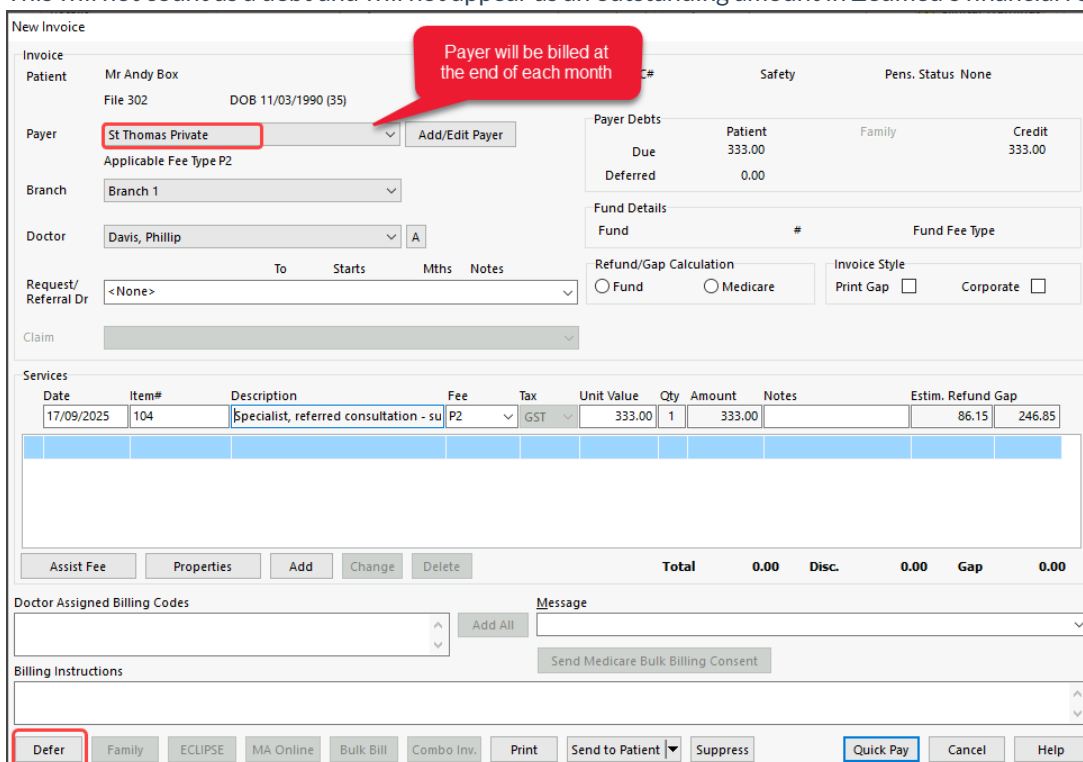
When an invoice is for a payer who is billed monthly, the invoice can be deferred. The payer could be the patient or a third party.

To defer an invoice:

1. Follow the normal invoice creation process.
2. Select the **Defer** button on the bottom left.

The invoice will close and be saved as a deferred invoice.

This will not count as a debt and will not appear as an outstanding amount in Zedmed's financial reports.



New Invoice

Invoice Patient Mr Andy Box File 302 DOB 11/03/1990 (35) C# Safety Pens. Status None

Payer **St Thomas Private** Add/Edit Payer

Applicable Fee Type P2

Branch Branch 1

Doctor Davis, Phillip A

Request/Referral Dr <None>

Claim

Services

Date	Item#	Description	Fee	Tax	Unit Value	Qty	Amount	Notes	Estim. Refund Gap
17/09/2025	104	Specialist, referred consultation - su	P2	GST	333.00	1	333.00		86.15 246.85

Assist Fee Properties Add Change Delete

Doctor Assigned Billing Codes Add All

Billing Instructions Send Medicare Bulk Billing Consent

Defer Family ECLIPSE MA Online Bulk Bill Combo Inv. Print Send to Patient Suppress Quick Pay Cancel Help

Payer Debts

	Patient	Family	Credit
Due	333.00		333.00
Deferred	0.00		

Fund Details

Fund	#	Fund Fee Type

Refund/Gap Calculation

☐ Fund ☐ Medicare

Invoice Style

Print Gap ☐ Corporate ☐

Total 0.00 **Disc.** 0.00 **Gap** 0.00

The invoice will show in the patient's account enquiry with a **D** for deferred.

You can use the **Payer** field and **Display Invoices > Deferred** to display deferred invoices by payer.

Invoice#	Date	Patient	HIC	CLM#	Br	Dr	Value	Outstanding
40802	18/09/2025	BOX, ANDY			MED	PD	333.00	333.00

Managing deferred invoices

At the end of the month or appropriate period, use Zedmed's **Print Deferred Bills** feature to process the deferred invoices, in two steps.

1. Check all monthly payers' invoices were deferred.
2. Print the invoices and convert them to debts.

You can perform these steps for all payers, or separately for patients and third parties. Once a deferred invoice is converted to a debt, it will appear as an outstanding amount on financial reports and Zedmed will recalculate the patient/payer balances in a patient's account enquiry. Once this has been done, it cannot be reversed.

To access the **Print Deferred Bills** feature:

1. Select the **Management** tab
2. Select **Debtors > Print Deferred Bills**.

This function may be used at any time to prepare your last month accounts for invoices that were Deferred at the time of billing. Please note that you may wish to perform Steps One and Two twice, for Private Payers and Third Party accounts.

Step One Print Report of Deferred Invoices **Print Report**

Uses the Debtors Report to print a detailed list of all Deferred invoices for last month. You should peruse this list and use it to make any changes to deferred bills before printing them out in Step Two below.

Step Two Print Deferred Accounts **Deferred Accounts**

a. Uses the Account Reminders program to print detailed Accounts for Deferred bills from last month.
b. Converts Deferred bills into "outstanding" invoices and re-calculates the Patient/Payer balances in Patient Details. Please Note once converted, it will not be possible to distinguish Deferred bills from other "outstanding" bills.
c. You may save a copy of the Screen version of these accounts, using the Save Report Function.

Close

Step 1 - Checking the invoices

In this step, you will compare a deferred invoices report to the **Appointment Report** or **Attendances Report** (recommended as it's a single page) and check each payer's invoices have been created and deferred.

To check the deferred invoices:

1. Open **Print Deferred Bills**.
2. Select **Print Report**.

This will open the **Debtor Report** for deferred invoices. **The default date range backdate to the end of the previous month.**

You can filter by payer, and run the report for private patient and third-party payers separately.

Debtor Report

Style

☒ Invoice Details and Credits

☐ Include Item Details

☐ Include Address Details

☐ Summary Only

☐ Credits Only

Criteria

Payer Type: **Third Party** (dropdown menu open showing: Private, Government, Third Party, All)

Status: **Deferred Only**

From: To:

Branch: **Branch 1**

Doctor: **All**

Category: **All**

Group: **All**

Sub Group: **All**

Invoice Date: **01/01/1997** to **30/09/2025**

Ageing Period (days): #1 **30**, #2 **60**, #3 **90**

Data

Group by doctor ☐

Group by patient ☒

Sub-total for patient ☐

Start each Doctor on a new page ☐

Held Accounts Only ☐

Print **Preview** **Export** **Close**

- Review the report, you may choose to check it against the **Attendance Report**.

Check that the payer's invoices for the month have been created and deferred.

Branch 1

Page 1

Debtor Report

Criteria		Style
Account Type	Third Party	Invoice Details and Credits
From Payer	St Thomas Private	
To Payer		
Branch	Branch 1	
Doctor	All	Group by
Status	Deferred Only	Patient
Period	01/01/1997 to 30/09/2025	

Account Payer Details				Contact Number						
File#	Patient Name			DOB						
Inv#	Brn	Doc	Accrued	Claim Number	Current	30 Day	60 Day	90 Day	Total	Defer

Third Party Accounts

St Thomas Private

256	Table, Ms Donna	08-08-1969								
40804	MED Phi Davis				0.00	0.00	0.00	0.00	0.00	250.00
302	Box, Mr Andy	11-03-1990								
40802	MED Phi Davis				0.00	0.00	0.00	0.00	0.00	333.00
GLAI68	Glass, Ms Ingrid	22-03-1976								
40803	MED WAR HEDRICK				0.00	0.00	0.00	0.00	0.00	250.00
Totals for St Thomas Private					0.00	0.00	0.00	0.00	0.00	833.00

Totals for Third Party Accounts

0.00	0.00	0.00	0.00	833.00
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The report's total will still show a deferred amount, not an outstanding debt.

Branch 1 Page 2

Report Totals for Third Party Accounts

BRN	NAME	CURRENT	30 Day	60 Day	90 Day	TOTAL	DEFER
MED	Branch 1	0.00	0.00	0.00	0.00	0.00	833.00

DOC	NAME	CURRENT	30 Day	60 Day	90 Day	TOTAL	DEFER
PD	Dr Phillip Davis	0.00	0.00	0.00	0.00	0.00	583.00
WH	Dr WARREN HEDRICK	0.00	0.00	0.00	0.00	0.00	250.00

- Create and defer any missing invoices.
- Close the report when you have finished your review.

Step 2 - billing the payer

You can now print out or save the invoices. Doing this will convert the deferred invoices into outstanding amounts (debt). Once the invoices have been converted, they cannot be distinguished from other invoices.

To process the invoices:

1. Open **Print Deferred Bills**.
2. Select **Deferred Accounts**.

This will open the **Deferred Accounts** screen. The default date range will go up to the end of the previous month.

The report is run for either private payers or third-party payers.

By default:

- **Private** will print all visits for the patient that month.
 - **Third Party** will print all deferred invoices on the same invoice.
3. Review all available settings carefully.
 4. Select **Screen**.

The screenshot shows the 'Deferred Accounts' window. On the left, the 'Style' section has 'Account Reminders' selected, with sub-options 'Claim Details', 'Referral Details', 'Service Details', and 'Notes' all checked. 'Mailing Labels' is unchecked. Below this is a 'Custom Message' section with three radio buttons: '#1' is selected, and the message box contains the text 'Friendly reminder'. On the right, the 'Criteria' section has 'Payer Type' set to 'Third Party' (highlighted with a red box). 'Single' and 'Range' radio buttons are present, with 'Range' selected. Below this are text boxes for 'First Account Payer' (containing 'St Thomas Private') and 'Last Account Payer'. A 'Branch' dropdown is set to 'Branch 1'. 'Treating Doctor' is set to 'All'. 'Invoice Status' is set to 'Deferred Only'. 'Invoice Date' has a range from '01/01/1997' to '30/09/2025', with the end date highlighted by a red box. A 'Title' text box is empty. There are two columns of checkboxes: the first column includes 'Print Standard Header' (checked), 'Use Patient's Usual Branch' (unchecked), 'Use Login Branch' (unchecked), 'Print Doctor's Custom Header' (unchecked), and 'Print Held Accounts' (checked); the second column includes 'Print Remittance Advice' (checked), 'Credit Card Details' (checked), 'New Page For Each Patient' (checked), and 'Print ECLIPSE Accounts' (unchecked). Below these are 'Ageing Period (days)' settings for #1 (30), #2 (60), and #3 (90). At the bottom of the criteria section are three 'Custom Message' checkboxes, all of which are checked. At the very bottom of the window are five buttons: 'Print', 'Screen' (highlighted with a red box), 'Close', 'Cancel', and 'Help'.

The invoices will open. The example below is for a third party and shows the first of 3 invoices for that month.

5. Use the menu to print out the invoices or save them in PDF format.
6. **Important:** Check that you have successfully printed or saved all the required invoices.

Once you have closed the Deferred invoices, you can not access them again.

7. Select **Close**.

8. Review and confirm the dialog.

When you select **Yes**, the invoices will be converted into current invoices with an amount owing (debt).

This cannot be reversed.

9. Select **OK** on the information dialog.

10. Select **Close** on the **Deferred Accounts** screen.

11. The invoices can now be distributed by post, fax or email.

The patient's account enquiry will display the invoice as an amount outstanding.

Receipting an invoice paid at a later date.

To receipt the invoice:

1. Open the patient's details screen.

2. Select **Acc Enquiry**.
3. Select the **Payer** from the drop-down.
4. Select the relevant invoice.
5. Select the **Receipt** button at the bottom.

This will open the **Receipt Payment** screen.

6. Select the payment method used
7. Check the correct **Banklist** is selected for the doctor.
8. Select **Allocate**.

This will return you to the **Acc Enquiry** screen.

9. Select the invoice
10. Select **Fully Receipt**.
11. Select **Close**.
12. Respond to the **Print** dialog to print or close.

Account Enquiry

Patient: Box, Andy

Payer: St Thomas Private

Recalculate

Curr: 333.00 30+ 0.00 60+ 0.00 90+ 0.00

Transaction

Invoice#	Date	Patient	HIC	CLM#	Br	Dr	Value	Outstanding
40802	18/09/2025	BOX, ANDY					333.00	333.00

Receipt Payment

302 Mr Andy Box

Payer: St Thomas Private

Due: Patient 333.00 Family Deferred Patient 0.00 Family Credits 333.00

Payments

Format	Name	Bank	Branch	Number	Banklist	Amount	Pay Date	Ref Num
Direct Deposit					BK2	333.00	30/09/2025	

1. Cash 2. Cheque 3. MC Cheque Tyro Eftpos ePayment Add Change

4. Card 5. Eftpos 6. Direct Deposit 7. Credits Tyro EasyClaim

Payment Total 0.00

Family Due Patient Due Amount Due 333.00

Balance 333.00

Combo Inv. Allocate Cancel

Adjustment Re-Invoice Reassign Payments Receipt MA Online Bulk Bill ECLIPSE Send to Patient Send BB Consent View BB Consent View Invoice