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

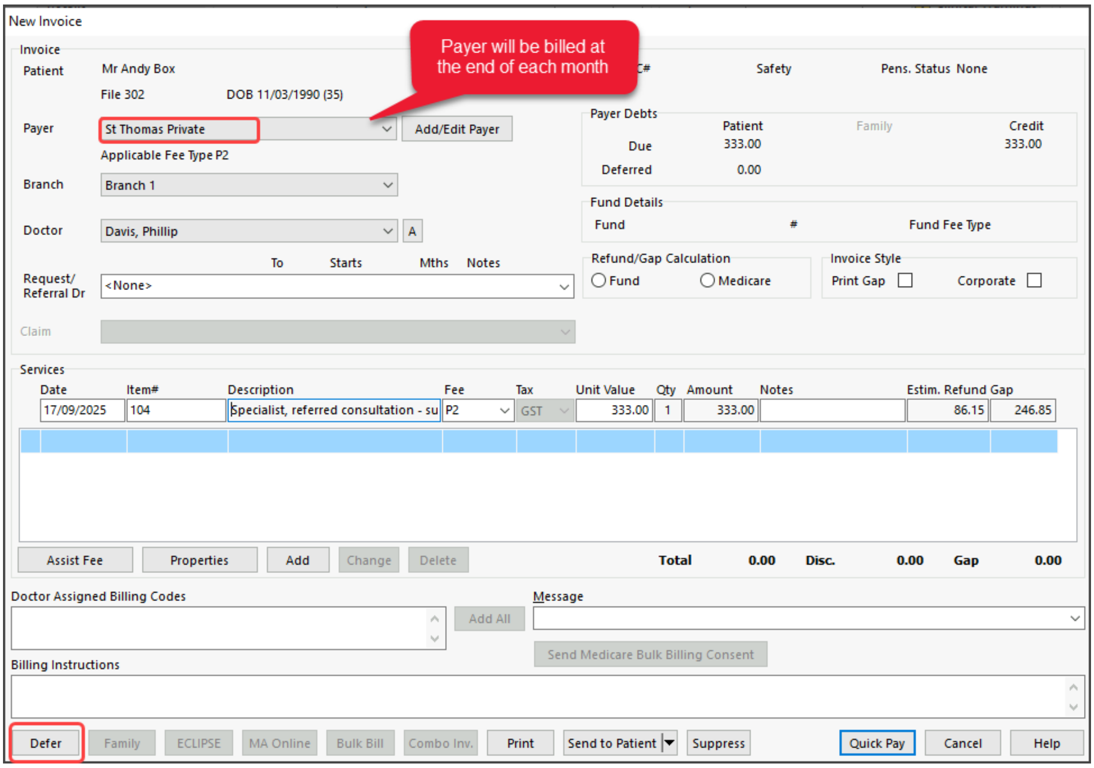
When an invoice is for a payer who is billed monthly, the invoice can be deferred. The payer could be the patient or a third party.

To defer an invoice:

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

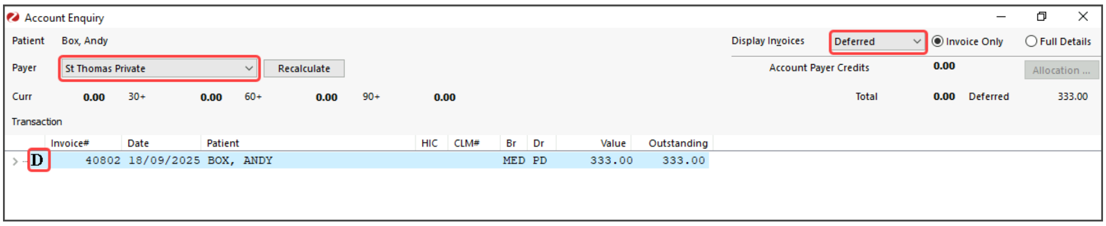
   The invoice will close and be saved as a deferred invoice.

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

   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.



Managing deferred invoices

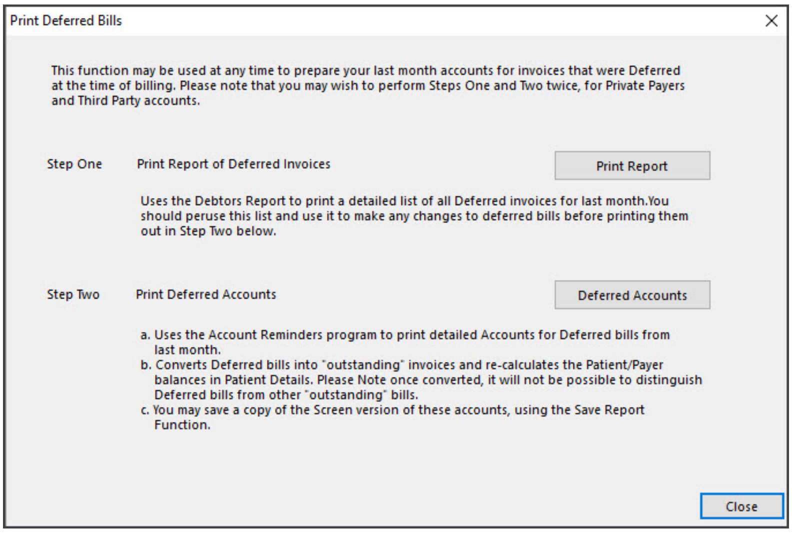
At the end of the month or appropriate period, use Zedmed's **Print Deferred Bills** feature to process the deferred invoices, in two steps.

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.**



Step 1 - Checking the invoices

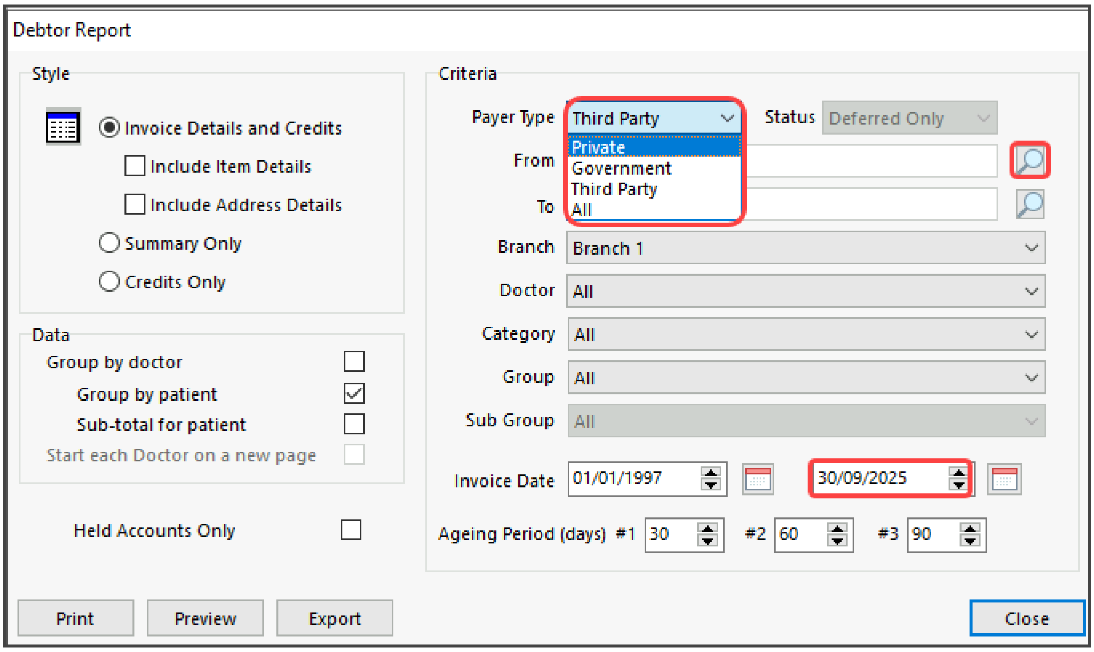
In this step, you will compare a deferred invoices report to the Appointment Report or Attendances Report (recommended as it's a single page) and check each payer's invoices have been created and deferred.

To check the deferred invoices:

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

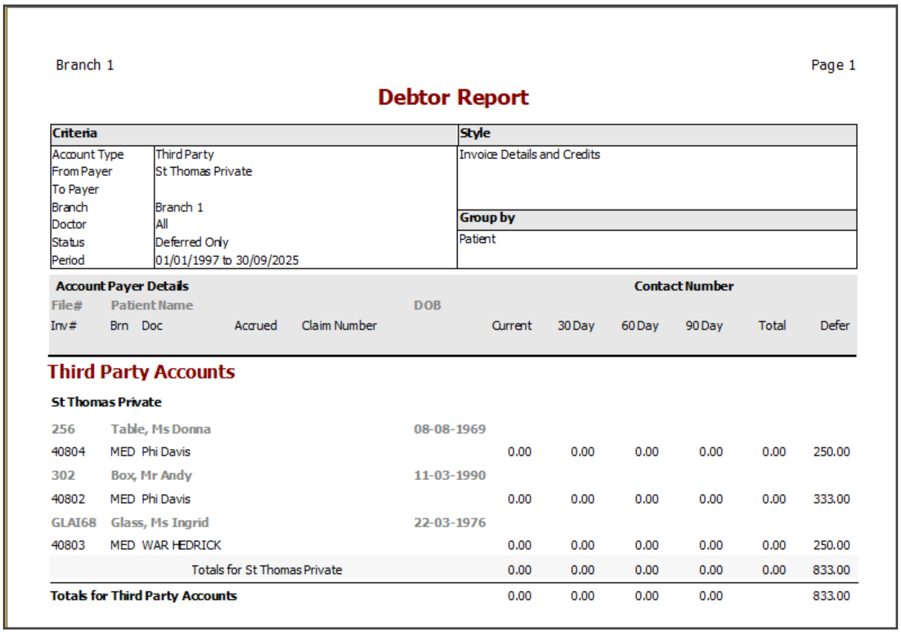
   This will open the **Debtor Report** for deferred invoices. **The default date range backdate to the end of the previous month.**

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



3. 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.



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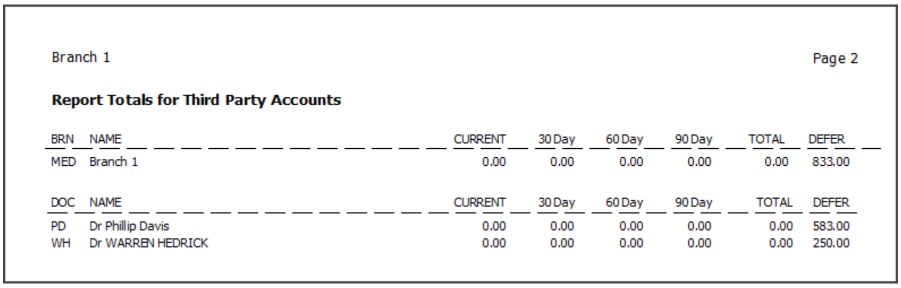
Debtor Report

Criteria		Style
Account Type	Third Party	Invoice Details and Credits
From Payer	St Thomas Private	
To Payer		
Branch	Branch 1	**Group by**
Doctor	All	Patient
Status	Deferred Only	
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

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



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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

4. Create and defer any missing invoices.
5. 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.

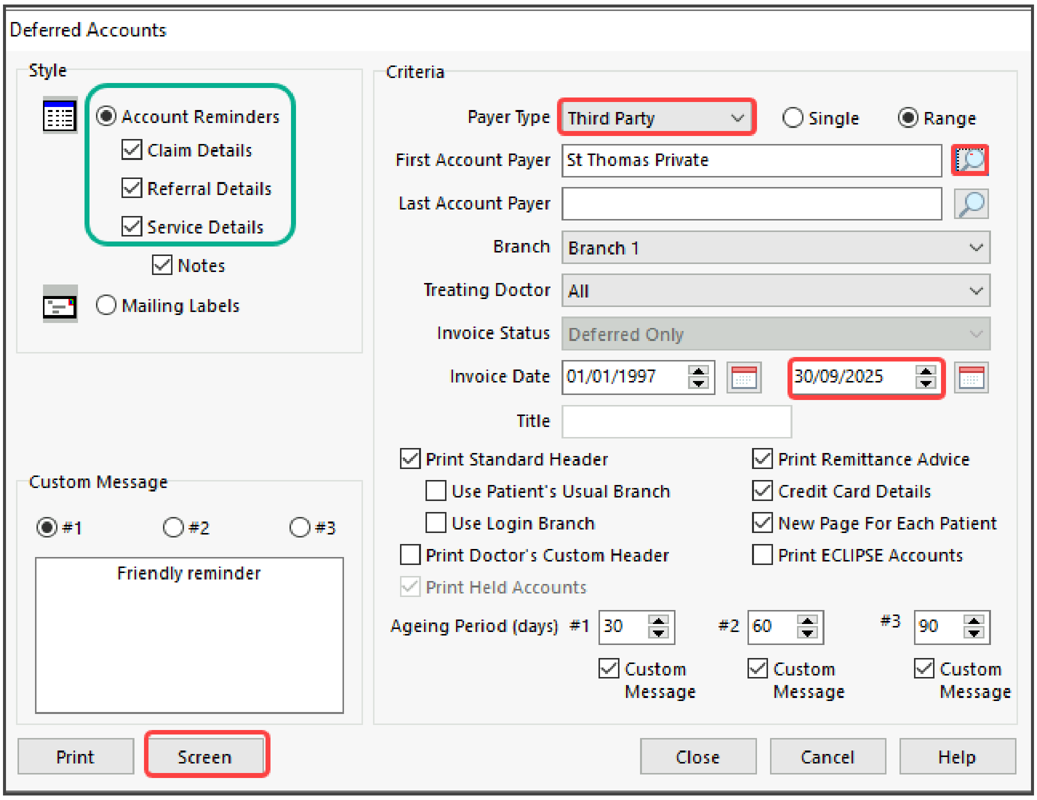
To process the invoices:

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.**

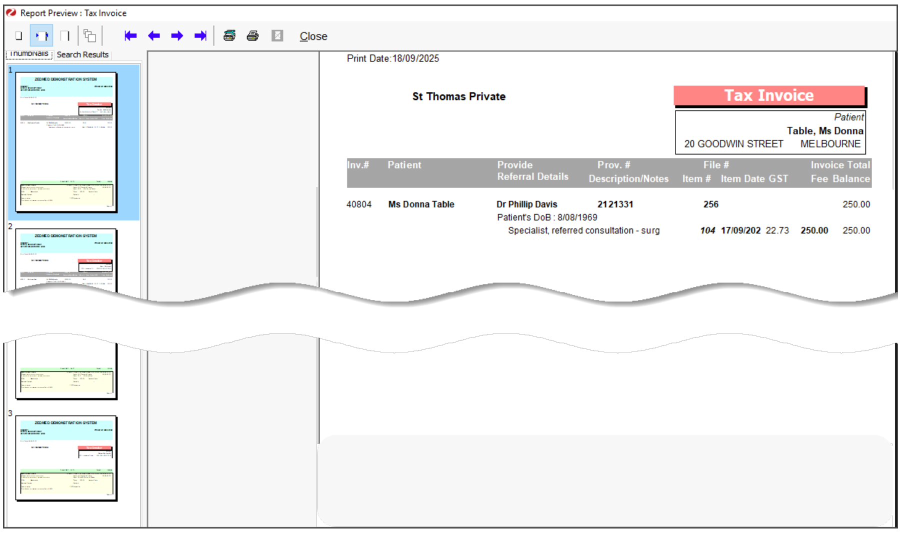
   The report is run for either private payers or third-party payers.

   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 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.

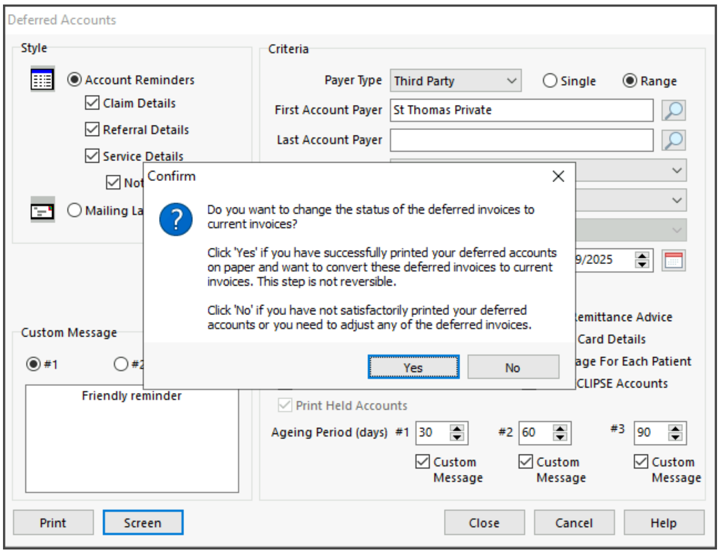
   Once you have closed the Deferred invoices, you can not access them again.



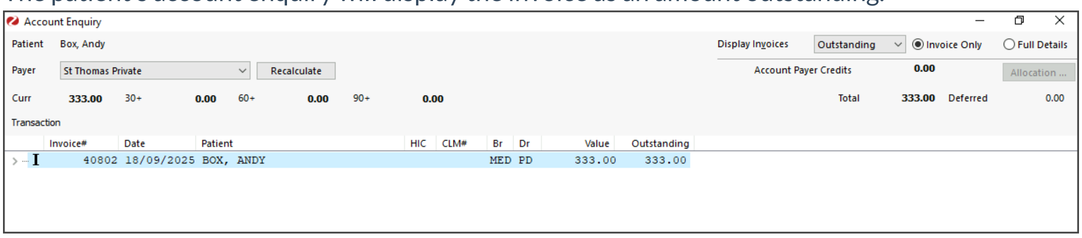
7. Select **Close**.
8. Review and confirm the dialog.

   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.