How to Delete Clinic Invoices

Needing to remove an invoice? As long as the invoice *does not* have a **payment associated** with it, and the **accounting period** is *not yet closed*, invoices can be deleted.

Not sure what the **accounting period** is? <u>Click here</u> to learn more.

There are two places where you could do so:

- 1. Via the **Patient's Record**, or
- 2. Via the **Batch** in **Claiming Medical**

Additionally, there are two use cases for deleting invoices:

- 1. Deleting the entire invoice (all items within the invoice)
- 2. Deleting a part of the invoice (1 or some items deleted, but not all items)

Let's take a closer look at both options.

Deleting through the Patient's Record

Begin by opening the patient's record and click on the Accounts button.

Patient Details	Other	Appointments	Recalls	Accounts	Episodes	Communication	Documents
	(

This button reveals a patient's billing/ treatment history where **each line is an invoice**:

Patient Det	ails Other	Appointments	Recalls	Accounts	Episodes	Communication	Documents	
Account Status	All	···- ₂ 🗸	Service Type	All		✓ From	🗰 То	
<u>Inv#</u> †	Date of Service	Do	ctor		Servi	ісе Туре	Inv Amount	ļ
4	25/08/2020	Ch	andra, Pete		Medi	care	\$ 134.30	
3	25/08/2020	Ch	andra, Pete		Medi	care	\$ 38.75	

From here, simply double click on the invoice you wish to delete.

Patient Det	ails Other	Appointments	Recalls	Accounts	Episodes	Communication	Documents
Account Status	All	2 •	Service Type	All		V From	🗰 То
<u>Inv#</u> ↑	Date of Service	Do	ctor		Serv	ice T ype	Inv Amount
4	25/08/2020	Ch	andra, Pete		Med	care	\$ 134.30
3	25/08/2020	Ch	andra, Pete		Med	care	\$ 38.75

This will open up the invoice, revealing the item numbers inside.

From here, you may simply right click on the desired item and hit **delete**, enter a reason, and hit **OK** to delete the item.

				nvoice	Details					×
Invoice Number	4		Location	Eccles	(ID:1)					
Payor	Medicare - Outpatie	nt Servici Bill	ing Notes	-	ra, Pete (ID: 3)		Referral	Date 0 month	s
Status	Awaiting Payment (\$134.30	\$134.30) Refem	ng Doctor Batch ID	0	В	atch #	Batch	Referral Status Open	Flag N - Not rec	uired (non reffered)
Date of Service Acc	Period Item Code	Bem Description	Un	t Price	OTY	GST	Charge inc GST	Show vo	ided transactions	Print Invoice +
25/08/2020 25/0	8/2020 110	Professional attendance at consulting rooms or hospital, by	S	134.30	1	\$ 0.00	\$ 134.30	25/08/2020 02:03 PM	Amir Balouchi (ACSS)	~ ()

Alternatively, you can delete invoices from the **Claiming Medical** section of FYDO, found under the **Claiming** tab.

Deleting through the Claiming Medical

Important Note: **Private** and **WorkCover** invoices will not appear here as this screen is only for invoices that are to be sent electronically.

Private invoices are invoices with the *Bill Type* set to *Private* in the billing screen.

Put your mouse over the **Claiming** tab and select **Claiming Medical**.



You will now see all your batches. So select the batch holding the invoice(s) you wish to delete.

Now, double click on the batch holding the desired invoice to be deleted.

You will now see the invoice(s) inside the batch.

Important note: Pay attention to the number of items in the invoice to be deleted.

- If you wish to delete all of the items within the invoice, simply right click on the invoice here, and select **Delete Invoice**
- Otherwise, if you wish to only delete a portion of the invoice (some items, but not all), simply double click on the invoice to open it up. Then right click on the items to be deleted and select **Move Item**

Moving items out

Medicare/ DVA claims

Eclipse claims

Items go into the current, open batch of the same bill type (e.g. Medicare)
If no open batch is present, a new one will be created

• Items always go into a **new, closed batch**

Next, you will need to find the moved item(s) in the newly created invoice in the open/ closed batch, at the top of the **Claiming Medical** screen and delete as desired.

Practitioner C				Daton 10		
	HANDRA, Pete (ID: 3)		Bat	tch Number		
Provider			D	ate Closed		
Туре 🛚	Nedicare		В	atch Status Open		
Category S	ipecialist					
Patient Name∔	MRN	DOS↓	Inv	KG	Claimed	Items
OLD, Katie		25/08/2020	6		173.05	2
OLD, Katie	Edit Invoice	28/08/2020	7		173.05	2
	Move Invoice Out					