

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? [Click here](#) 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)

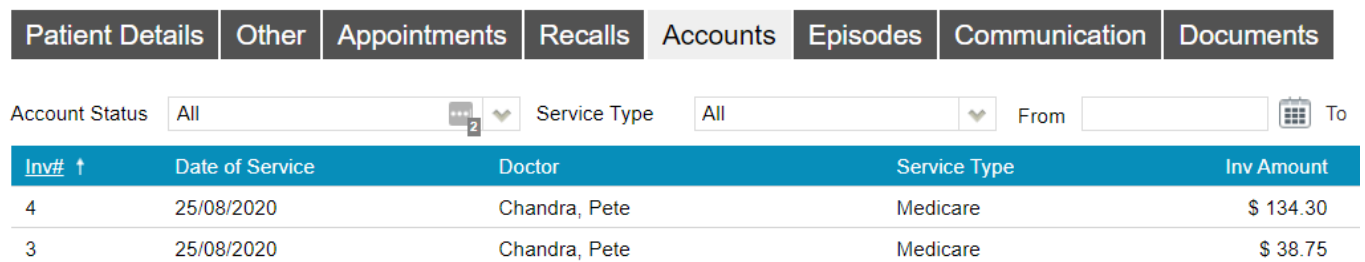
Let's take a closer look at both options.

Deleting through the Patient's Record

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



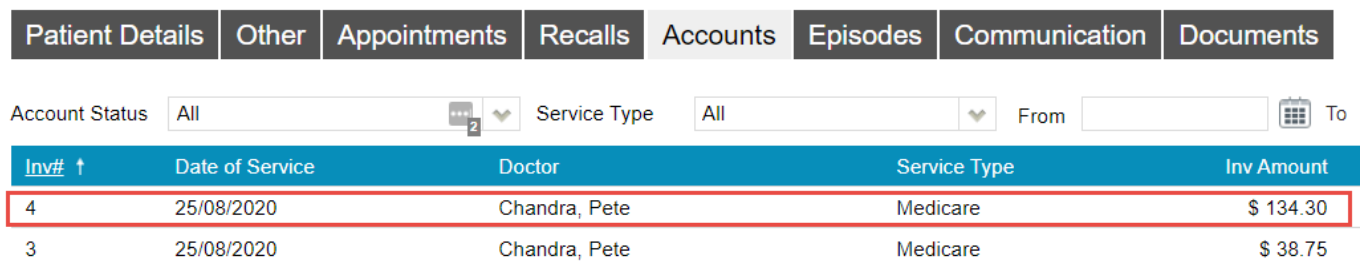
This button reveals a patient's billing/ treatment history where **each line is an invoice**:



A screenshot of the patient's billing history interface. At the top, there is a navigation bar with buttons for Patient Details, Other, Appointments, Recalls, Accounts, Episodes, Communication, and Documents. The 'Accounts' button is highlighted. Below the navigation bar, there are two dropdown menus: 'Account Status' set to 'All' and 'Service Type' set to 'All'. To the right of these are 'From' and 'To' date pickers. Below these elements is a table with the following data:

Inv# ↑	Date of Service	Doctor	Service Type	Inv Amount
4	25/08/2020	Chandra, Pete	Medicare	\$ 134.30
3	25/08/2020	Chandra, Pete	Medicare	\$ 38.75

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



A screenshot of the patient's billing history interface, similar to the previous one. The 'Accounts' button is highlighted. The table below shows the same data as the previous screenshot, but the first row (Invoice #4) is highlighted with a red rectangular border.

Inv# ↑	Date of Service	Doctor	Service Type	Inv Amount
4	25/08/2020	Chandra, Pete	Medicare	\$ 134.30
3	25/08/2020	Chandra, Pete	Medicare	\$ 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.



The screenshot shows a window titled "Invoice Details" with a close button (X) in the top right corner. The window contains the following information:

- Invoice Number: 4
- Location: Eccles (ID:1)
- Service Type: Medicare - Outpatient
- Servicing Doctor: Chandra, Pete (ID: 3)
- Payor: Medicare
- Billing Notes: -
- Referral Date: -- 0 months
- Status: **Awaiting Payment (\$134.30)**
- Referring Doctor: -
- Referral Flag: **N - Not required (non referred)**
- Invoiced: \$134.30
- Batch ID: 0
- Batch #:
- Batch Status: **Open**

At the bottom right, there are two buttons: "Show voided transactions" and "Print Invoice".

Date of Service	Acc Period	Item Code	Item Description	Unit Price	QTY	GST	Charge inc GST	Audit Date	User	Status
25/08/2020	25/08/2020	110	Professional attendance at consulting rooms or hospital, by ...	\$ 134.30	1	\$ 0.00	\$ 134.30	25/08/2020 02:03 PM	Amir Balouchi (ACSS)	

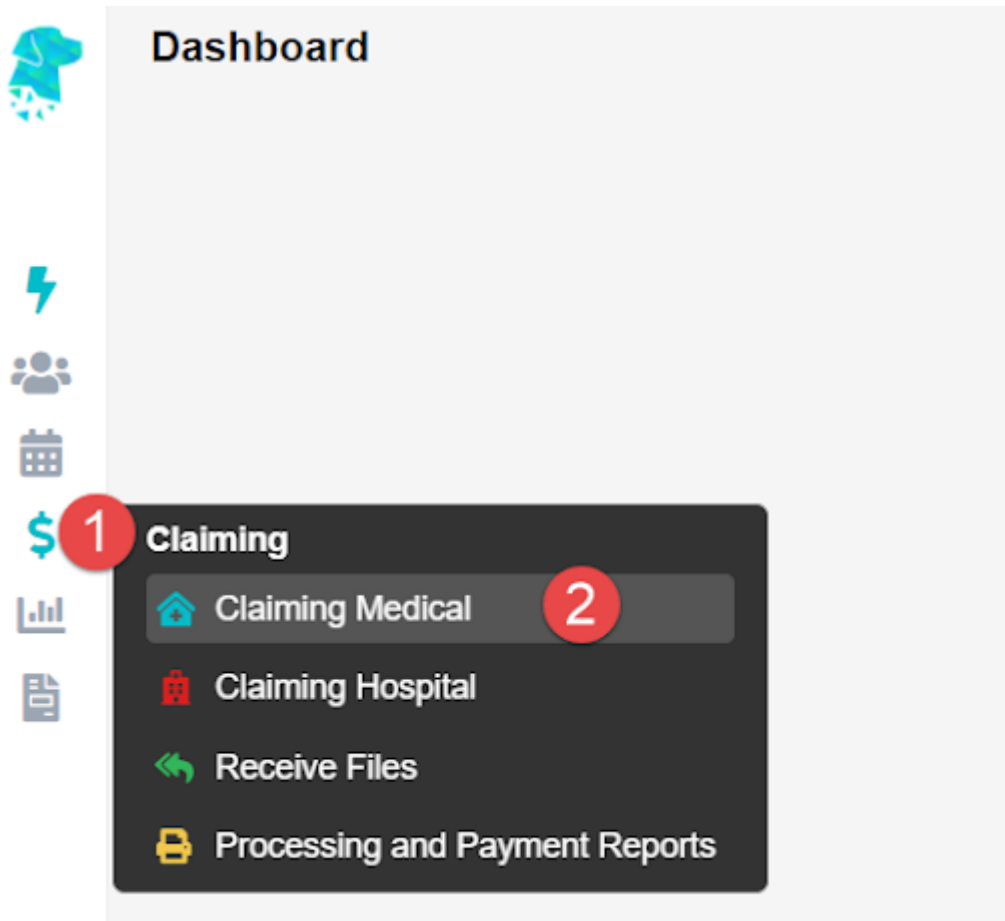
Alternatively, you can delete invoices from the **Claiming Medical** section of FYDO, found under the **Claiming** tab.

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

- 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**

Eclipse claims

- 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.

CLAIM DETAILS > BATCH DETAILS			
Location	Eccles (ID: 1)	Batch ID	0
Practitioner	CHANDRA, Pete (ID: 3)	Batch Number	
Provider		Date Closed	
Type	Medicare	Batch Status	Open
Category	Specialist		

Patient Name ↓	MRN	DOS ↓	Inv	KG	Claimed	Items
BOLD, Katie	118	25/08/2020	6		173.05	2
BOLD, Katie		28/08/2020	7		173.05	2

- Delete Invoice
- Edit Invoice
- Move Invoice Out
- Patient Screen
- View Items