How to Delete Clinic Invoices

Needing to remove an invoice? 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 held)
- 2. Deleting a part of the invoice (1 or some items deleted, but not all)

Let's take a closer look at both options and use cases.

Deleting through the Patient's Record

Begin by opening the patient record of the patient in question and click on the Accounts button.



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	Doc	ctor		Serv	ісе Туре	Inv Amount
4	25/08/2020	Cha	andra, Pete		Medi	care	\$ 134.30
3	25/08/2020	Cha	andra, Pete		Medi	care	\$ 38.75

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

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

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

You may repeat this step for as many items as you need to delete.

Note: Deleting the final item in the invoice will effectively delete the entire invoice.

						Invo	oice Detai	ils					×
Invoice Nun	nber	3			Loca	ation Ec	cles (ID:1)						
Service 1	Гуре	Medic:	are - Outpatier	nt	Servicing Do	octor Ch	andra, Pe	te (ID: 3)					
Pa	ayor	Medica	are		Billing N	lotes -				Referral	Date 0 month	15	
St	atus	Awaiti	ng Payment (\$38.75)	Referring Do	octor -				Referral	Flag N - Not rec	uired (non re	ffered)
Invo	iced	\$38.75			Batc	th ID 0		Batch #	Batcl	h Status Open Show vo	ided transactions	Print Invo	ice +
Date of Service	Acc P	eriod	Item Code	Item Description		Unit Pri	ice QTY	GST	Charge inc GST	Audit Date	User	Status	
25/08/2020	25/08/	2020	23	Professional attendar practitioner at consult	ice by a general	\$ 38.	75 1	\$ 0.00	\$ 38.75	25/08/2020 02:02 PM	Amir Balouchi (ACSS)		• Ĵ

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

Deleting through the Claiming Medical

Place your mouse over the Medical tab (\$ Sign) and select Claiming Medical.

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



This screen is where **invoices** created go. They go inside a batch that is then **sent** from this screen.

Note: this does not apply to **Private** invoices. These are invoices with the *Bill Type* set to *Private* in the billing screen.

So you may double click on the batch holding the desired invoice to be deleted.

Location		Provider				Туре		Statu	5
All locations	•••• ₂ 🗸	All Provide	rs		*	All Types	*	8 iter	ns checke
Туре	ID	Batch #	Qty	Date †	Prov	vider	с	aimed	Status
Medicare	0		3		CHA	NDRA, Pete		480.40	Open
Medicare	0		3		СНА	NDRA, Pete		480.40	Ope

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

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Import note: Pay attention to the number of items in the invoice in question.

• If you wish to delete all of the items within the invoice, simply right click on the invoice here, and select **Delete Invoice**

CLAIM DETAILS	> BATCH DETAILS								
Location	Eccles (ID: 1)				Batch ID 0				
Practitioner	CHANDRA, Pete (ID:	3)		Batch Number					
Provider				E					
Туре	Medicare			В	atch Status Open				
Category	Specialist								
Patient Name +		MRN	DOS+	Inv	KG	Claimed	Items		
BOLD, Katie		119 Delete Invoice	25/08/2020	6		173.05	2		
BOLD, Katie		Edit Invoice	28/08/2020	7		173.05	2		
		Move Invoice Out							
		Patient Screen							
		525 State 155 S							

• 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**

CLAIM DETAILS > BATCH DETAILS > ITEM DETAILS

Location	Eccles (ID: 1)	Batch ID 0	MRN	118
Practitioner	CHANDRA, Pete (ID: 3)	Batch Number	Patient	BOLD, Katie
Provider		Date Closed	DOB	29/05/1939
Туре	Medicare	Batch Status Open	Gender	Female
Category	Specialist	Transaction ID		
Referring Dr		Invoice Text		

Referral Date

Referral Flag N - Not required (non reffered)

ID	Code	DOS	Description	Rule	Claimed	GST	Payable	MedExc
1	23	28/08/2020	Professional attendance by a general practitioner at consult	Ĩ	Edit Item	0.00	0.00	
2	110	28/08/2020	Professional attendance at consulting rooms or hospital, by	w.	Move Item	0.00	0.00	