

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)

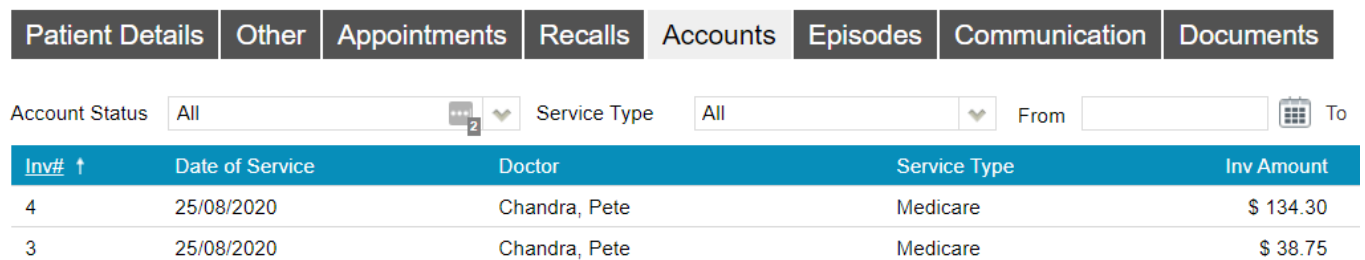
Let's take a closer look at both options and use cases.

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**:

A screenshot of a patient's billing history interface. At the top is a navigation bar with buttons for 'Patient Details', 'Other', 'Appointments', 'Recalls', 'Accounts', 'Episodes', 'Communication', and 'Documents'. Below this is a filter section with 'Account Status' set to 'All' and 'Service Type' set to 'All'. A 'From' date field is empty, followed by a 'To' date field with a calendar icon. The main part of the image is a table with five columns: 'Inv# ↑', 'Date of Service', 'Doctor', 'Service Type', and 'Inv Amount'. There are two rows of data in the table.

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

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.

The screenshot shows the 'Invoice Details' window with the following information:

- Invoice Number: 3
- Location: Eccles (ID:1)
- Service Type: Medicare - Outpatient
- Service Type: Medicare - Outpatient
- Payor: Medicare
- Status: Awaiting Payment (\$38.75)
- Invoiced: \$38.75
- Location: Eccles (ID:1)
- Servicing Doctor: Chandra, Pete (ID: 3)
- Billing Notes: -
- Referring Doctor: -
- Referral Date: - 0 months
- Referral Flag: N - Not required (non referred)
- Batch ID: 0
- Batch #: -
- Batch Status: Open
- Show voided transactions: -
- Print Invoice: -

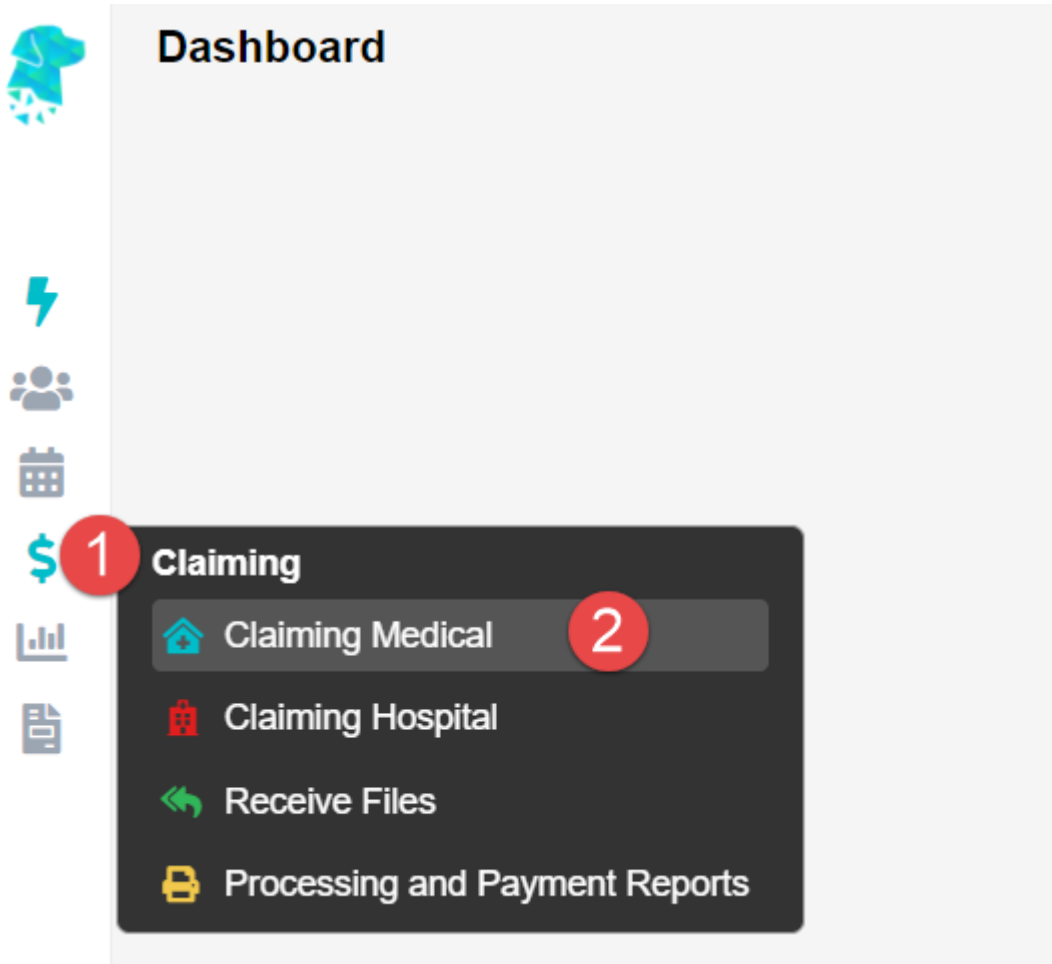
Date of Service	Acc Period	Item Code	Item Description	Unit Price	QTY	GST	Charge inc GST	Audit Date	User	Status
25/08/2020	25/08/2020	23	Professional attendance by a general practitioner at consult...	\$ 38.75	1	\$ 0.00	\$ 38.75	25/08/2020 02:02 PM	Amir Balouchi (ACSS)	

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

Deleting through the Claiming Medical

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.



CLAIMING MEDICAL							
Location	Provider	Type	Status				
All locations	All Providers	All Types	8 items checked				
Type	ID	Batch #	Qty	Date ↑	Provider	Claimed	Status
Medicare	0	3			CHANDRA, Pete	480.40	Open

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



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		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	<div style="border: 1px solid gray; padding: 5px;"> <div style="border: 1px solid red; padding: 2px;">Delete Invoice</div> <div>Edit Invoice</div> <div>Move Invoice Out</div> <div>Patient Screen</div> <div>View Items</div> </div>
BOLD, Katie		28/08/2020	7		173.05	2	

- 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
Type Medicare	Batch Status Open	Gender Female
Category Specialist	Transaction ID	

Referring Dr Invoice Text
 Referral Date Referral Flag **N - Not required (non referred)**

ID	Code	DOS	Description	Rule	Claimed	GST	Payable	MedExc
1	23	28/08/2020	Professional attendance by a general practitioner at consult		00.75	0.00	0.00	
2	110	28/08/2020	Professional attendance at consulting rooms or hospital, by	W		0.00	0.00	

Edit Item

Move Item