

# 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.




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 Details	Other	Appointments	Recalls	Accounts	Episodes	Communication	Documents
Account Status	All		Service Type	All		From	 To
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.

Patient Details	Other	Appointments	Recalls	Accounts	Episodes	Communication	Documents
-----------------	-------	--------------	---------	----------	----------	---------------	-----------

Account Status   Service Type   From   To

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 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.

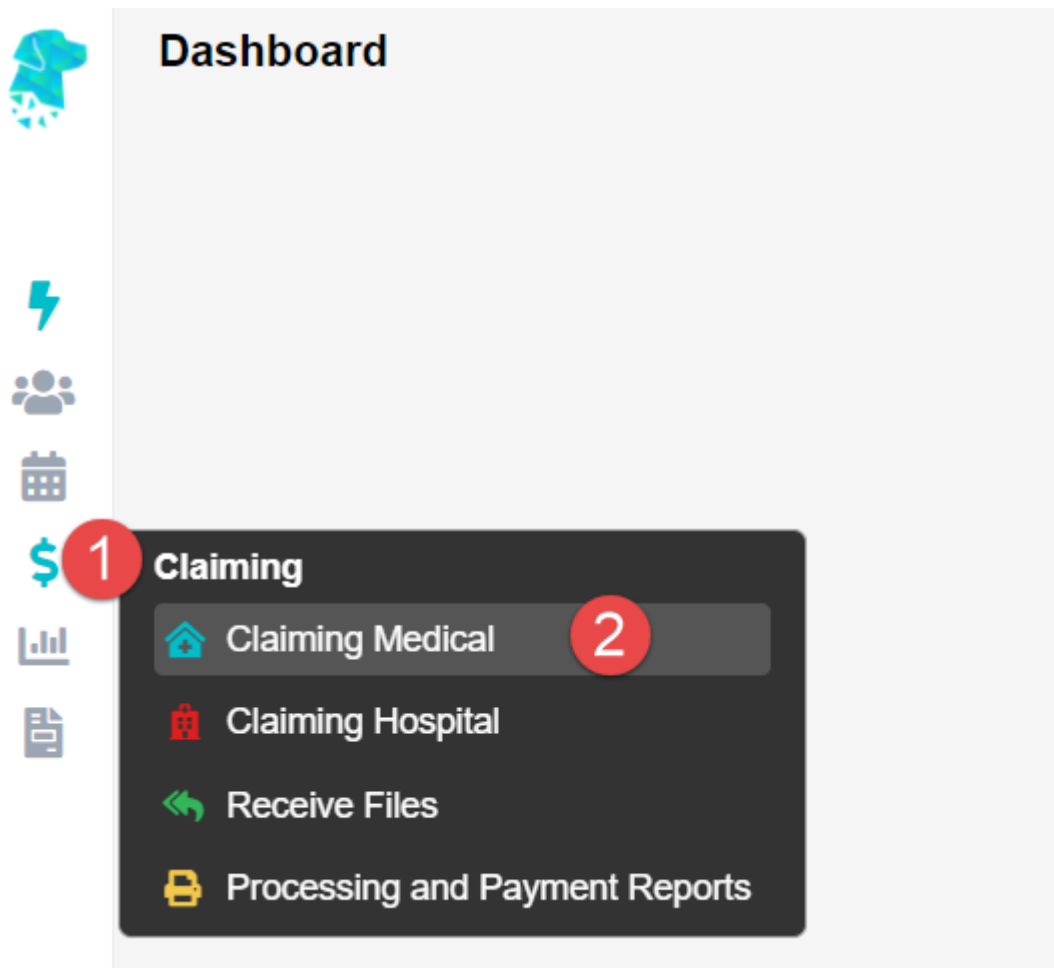
Invoice Details										
Invoice Number	3	Location	Eccles (ID:1)							
Service Type	Medicare - Outpatient	Servicing Doctor	Chandra, Pete (ID: 3)							
Payor	Medicare	Billing Notes	-	Referral Date	- - 0 months					
Status	Awaiting Payment (\$38.75)	Referring Doctor	-	Referral Flag	N - Not required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

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	118	28/08/2020	7		173.05	2

**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
BOLD, Katie		28/08/2020	7		173.05	2

Delete Invoice

Edit Invoice

Move Invoice Out

Patient Screen

View Items

- 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