

Posting Invoices in OD Professional

Posting is defined as the act or process of entering data in an accounts ledger. Although OD Professional is not an accounting or bookkeeping program, it does track sales and related transactions by patient and insurance plans. However, posting is only required once (two or three times if entering an adjustment or credit or both) when creating an invoice.

When you invoice your customer for services rendered or products purchased, you enter all charges and payments on a new invoice in the Patient's Account → Transaction View window. After entering these transactions, you need to post the invoice.

Posting in OD Professional accomplishes two things:

1. First, it applies the payment, adjustment or credit to the outstanding charges, moving it from the Payment Entry/Details area (at the lower left) up to the invoice.
2. Second, it performs a check of errors on the invoice, verifying that the transactions were entered in correctly (e.g. missing diagnosis codes) and that there is no missing patient information (e.g. missing birth date).

Post All Only Once

When creating an invoice, you only need to post the invoice once. After entering the patient charges and payments click **Post All**.

It is not necessary to click Post All after:

- entering each individual charge,
- entering charges and before entering payments
- changing insurance plans on individual charges

ODPro Tip: If you make any changes to an invoice that was already posted, you will be notified that this change will require the invoice to be posted again.

Posting Adjustments / Discounts and Applying Credits

The only exception to the rule of "Post All Only Once" is when entering adjustment / discounts or applying credits.

After entering an adjustment or applying a credit, you need to click **Post All** to move the adjustment or credit from the Payment Entry/Details area up to the invoice. Note that the adjustment / discount or credit is now reflected in the invoice balance after posting.

Following these simple rules reduces the numbers of clicks you make, speeds up the invoicing process and allows you to work more efficiently in OD Professional.

Remember, although the Postman Always Rings Twice, in OD Professional you only need to **Post All Once**.

Please refer to the [Working with Invoices](#) job aid for more information.