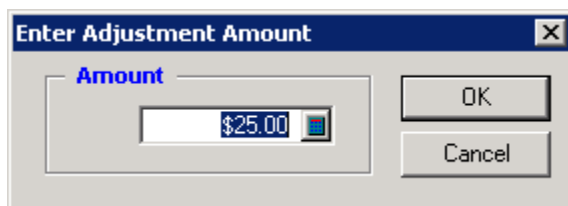


Entering Adjustments and Discounts

At times you'll need to make an adjustment or provide a discount to a patient invoice. Sales, professional discounts, employee discounts or doctor's courtesies are all examples of an adjustment or discount you can make to a patient or employee invoice.

How to Enter Adjustments and Discounts

1. Browse for and make the patient active.
2. Double click on the Patient Account folder under the patient record
3. Select the New Invoice tab
4. Confirm Encounter Date and Provider
5. Confirm Insurance (e.g. Primary, Secondary, Other)
6. Enter and Save all charges
7. Right mouse click on the invoice
8. Select Make Adjustments
9. Enter amount of Adjustment or Discount



- **Note:** If you need to calculate the total amount of the adjustment or discount, click the calculator icon next to the amount field. The calculator will automatically total all charges on the invoice. If the total amount is different, enter the correct amount.
10. Calculate the adjustment or discount using the calculator and Click OK
 11. Change the Billing Code to the correct Adjustment or Discount (e.g. Co-Pay, Credit, Savings, Doctor's Courtesy, etc.)
 - To add additional options for Adjustments or Discounts, enter them in the Billing Code Table (e.g. Employee Savings, 2nd Pair Savings, etc.)
 12. Select the Transaction to Apply. (This is usually the first transaction number)
 13. Enter the Transaction Description (This is what prints on the patient's statement) and Click OK
 - To show value to the patient, always remember to enter a transaction description that accurately describes the adjustment or discount they are receiving.
 14. Enter Patient Payments (if applicable)
 15. Click Save Charge
 16. Click Post All
 17. Print Walk Out Statement