Applying Credit to Invoices

To apply an account credit to an outstanding invoice:

1. Browse ... for and make the patient active.
2. Double click on the Patient Account folder
3. Create New Invoice
4. Enter all Charges
5. Right click on the invoice and select Apply Credit.
6. Select either the entire credit amount or change the amount you would like to apply
7. Click OK
8. Select Billing Code (e.g. cash, check, etc.) and Transaction to Apply
9. Enter Transaction Description (e.g. Check No., Gift from Grandma, etc.)
10. Confirm Date and click OK
11. Click Save Charge – F10
12. Click Post All - F12
13. Click Finish after error checking. (Correct all errors before continuing)

Remember that credit memos are applied in chronological order and you'll need to apply an account credit as many times as there are credit memos.