


Changing Responsible Providers on Posted Invoices


After printing the daily receipts reports, note any patients assigned to providers other than the practice providers. All patients should be assigned a responsible provider, who is the doctor the patient normally sees. The default provider assigned to all patients is “Did Not Assign”.

If you notice any patients not assigned to their assigned provider, you must change the provider using the following procedures.

Changing Provider on an Open Invoice with a Balance

1. Browse  for the patient and make active
2. Open the Patient Account
3. Select the open invoice assigned to the wrong provider
4. Right click on the Invoice and Select Administrative Unlock
5. Enter User Name and Password and click OK
6. Change provider.
7. Select YES to the question: “This will change the Provider on this invoice. Do you wish to change the Patient Provider also?”
 - a. Remember that the provider on the invoice is the provider the patient sees and will usually be the responsible provider shown on the Patient Address View window. There will be times, when the patient sees a provider other than his/her responsible provider. When you change the provider on the patient invoice and are asked the above question, the patient may elect to either keep or change his/her responsible provider. The decision is left up to the patient.
8. Click Post All

Changing Provider on Closed Invoices

1. Browse  for the patient and make active
2. Right click on Patient Record and Select Patient Ledger
3. Right click on invoice assigned to wrong provider
4. Select “Send Selected Invoice to Patient Account”
5. Enter User Name and Password and click OK
6. Open the Patient Account
7. Select the open invoice assigned to the wrong provider
8. Right click on the Invoice and Select Administrative Unlock

9. Enter User Name and Password and click OK
10. Change provider.
11. Select YES to the question: “This will change the Provider on this invoice. Do you wish to change the Patient Provider also?”
 - a. Remember that the provider on the invoice is the provider the patient sees and will usually be the responsible provider shown on the Patient Address View window. There will be times, when the patient sees a provider other than his/her responsible provider. When you change the provider on the patient invoice and are asked the above question, the patient may elect to either keep or change his/her responsible provider. The decision is left up to the patient.
12. Click Post All