

Printing Closed Invoices

All patient invoices are listed in the Patient Ledger, but those invoices that are closed (do not have a balance) are sent to the Patient Ledger from the Patient Account. Any invoice that has an insurance or patient balance sits in the Patient Account waiting for payment.

Please Note: only invoices with a patient balance, have the amount listed on the invoice tab in Patient Account.

At times patients will call and ask for a copy of an invoice for services or purchases days, weeks or months later.

To print a closed invoice for a patient, follow the steps listed below:

1. Open the Patient Address view window by clicking on Patient and Contact Browse
2. Enter a partial last and first name for the patient and click on the browse button
3. Right click on the Patient Record and select Patient Ledger
4. On the Invoice Summary tab, select the invoice you want to print and do one of the following:
 - a. Click on the View F2 button on the bottom of the screen
 - b. Select F2
 - c. Select the Invoice Detail tab
5. Confirm invoice and hit the Print button on the bottom of the screen.
6. Close Patient Ledger

Patient Ledger View

Invoice Summary | **Invoice Detail** | Invoice Charge Detail | Invoice Claim Information | Order History

Patient Details
 Pan: Peter Chart Number: 128951

Insurance
 Primary MDC
 Secondary SEL
 Other SEL

Views
 Show All Unpaid Partial Paid Paid Private Balance **Co Pay** \$0.00

Patient Invoices

| | E/F | Invoice Number | O/S | Invoice Date | Insured Amount | Patient Amount | Payments | Adjust | BS 1 | BS 2 | BS 3 | PA T | Insurance Balance | Patient Balance |
|--|--------------------------|----------------|-------------------------------------|--------------|----------------|----------------|------------|---------|------|------|------|------|-------------------|-----------------|
| | <input type="checkbox"/> | 0002573 | <input checked="" type="checkbox"/> | 5/23/2008 | \$ 90.00 | \$ 90.00 | \$ 0.00 | \$ 0.00 | B | | | W | \$ 90.00 | \$ 90.00 |
| | <input type="checkbox"/> | 0002586 | <input checked="" type="checkbox"/> | 5/26/2008 | \$ 70.00 | \$ 20.00 | \$ 0.00 | \$ 0.00 | B | | | W | \$ 70.00 | \$ 20.00 |
| | <input type="checkbox"/> | 0002698 | <input checked="" type="checkbox"/> | 5/30/2008 | \$ 97.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | U | | | P | \$ 97.00 | \$ 0.00 |
| | <input type="checkbox"/> | 0002745 | <input checked="" type="checkbox"/> | 6/2/2008 | \$ 95.00 | \$ 4.75 | (\$ 35.00) | \$ 0.00 | U | | | W | \$ 95.00 | \$ 39.75 |
| | <input type="checkbox"/> | 0002812 | <input type="checkbox"/> | 6/16/2008 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | P | | | P | \$ 0.00 | \$ 0.00 |
| | <input type="checkbox"/> | 0002886 | <input checked="" type="checkbox"/> | 6/27/2008 | \$ 52.40 | \$ 274.60 | \$ 0.00 | \$ 0.00 | U | | | W | \$ 52.40 | \$ 274.60 |
| | <input type="checkbox"/> | 0002898 | <input type="checkbox"/> | 7/4/2008 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | B | | | P | \$ 0.00 | \$ 0.00 |

Record 6

Aging Summary

| Balance | Current | 31-60 | 61-90 | Over 90 |
|-----------|---------|---------|---------|-----------|
| Private | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 424.35 |
| Insurance | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 404.40 |
| Total | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 828.75 |

CMS Claim Form History

| Date | Type | ID | Insurance | Description |
|------|------|----|-----------|-------------|
| | | | | |

Print CMS | **View F2** | Save | Close