

IES Medical: Accounts

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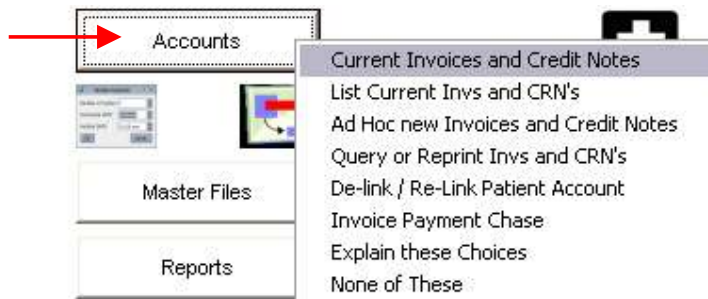
Purpose

The purpose of this Document is to reveal the functions available at ACCOUNTS on the Medical main menu.



Introduction

From the Medical main menu, you will select ACCOUNTS for options relating to Invoices and Credit Notes in cases where you are not already on the Consultation screen to perform these actions for a current Patient Consultation.



When ACCOUNTS is selected, the options shown above are offered. One of the options is to 'Explain these choices', and we present the text revealed by this option, to introduce the other options –

Current Invoices and Credit Notes

Select an open Invoice or Credit Note for further action. (Open Invoices and Credit Notes are those that have been opened on current Consultations and not yet closed.)


Open Invoice Report

Will list "OPEN" Invoices and Credit Notes that still need to be finalised.

Ad Hoc Invoices and Credit Notes

This option allows creation of new Invoices and / or Credit Notes without there being a current Consultation in place, and it is used to create a Credit Note following an Account Query, or to create an additional Invoice to process further charges omitted on a prior Invoice, or simply to create Invoices and Credit Notes without opening a Consultation. (The system will automatically Generate Consultation records in this case.)

If a Patient is selected for whom an Invoice or Credit Note is still open, then a new one is not created, but the current open Invoice or Credit Note is offered for action.

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Invoice Query and Re-Print

Any Invoice, Current or prior, may be queried from here. Invoices that have been Finalised (Closed), may also be reproduced, i.e. printed, e-mailed, faxed.

De-link / Re-link Patient Account

An easy-to-use facility to use when a Patient with an existing presence in our Records, changes to a new Account Holder. An example could be a minor, previously on Parents' Account, now acquires own Customer Account or own personal Medical Aid.

Unpaid Invoice CHASE

This Choice provides entry to the Invoice CHASE System, an advanced follow-through system that assists in following up Invoices that have not been paid as expected.

Current Invoices and Credit Notes

For this option, the system presents a list of 'open' Invoice and Credit Notes, and when you select an item, the system opens the Invoice or Credit Note respectively, for further processing.

Hint: There are separate User Manuals that describe how to process Invoices and Credit Notes.




Type	Date	Patient
1	INV 03/11/2006	Miss Linden Nadine
2	INV 03/11/2006	Mr Chang Sua

Select ALL Show Full Line Cancel OK

List Current Invoices and CRN's

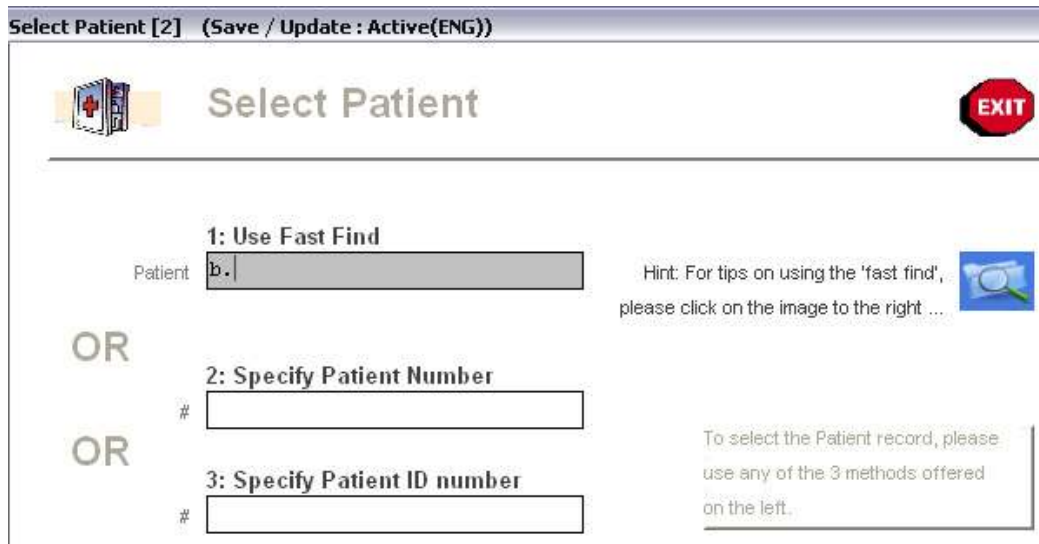
This option produces a Report of open Invoices and Credit Notes, and a sample is shown below.

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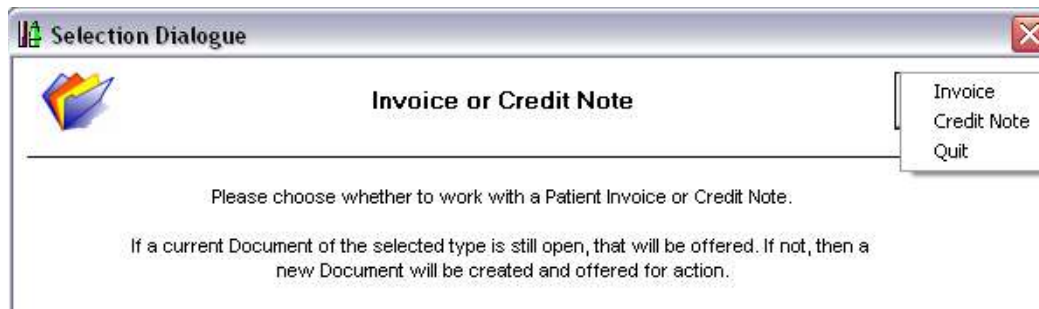



Ad Hoc Invoices and Credit Notes

For ad hoc Invoices and Credit Notes, you have to select a Patient as the 1st step.



Once the Patient has been identified, you have to choose whether to process a new Invoice or a new Credit Note.



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In the event that there is no prior Consultation history for the selected Patient, the system will refuse ad hoc processing and insist that a 1st Consultation be opened for the Patient.



Query or Reprint Invs and CRN's

From the CONSULTATIONS function on the main Medical menu, you can query any Consultation, and often that is a shorter route than the option presented here. In this case, you have to select the Patient 1st. Then the system opens the CRM Events record for the Patient (sample shown below).

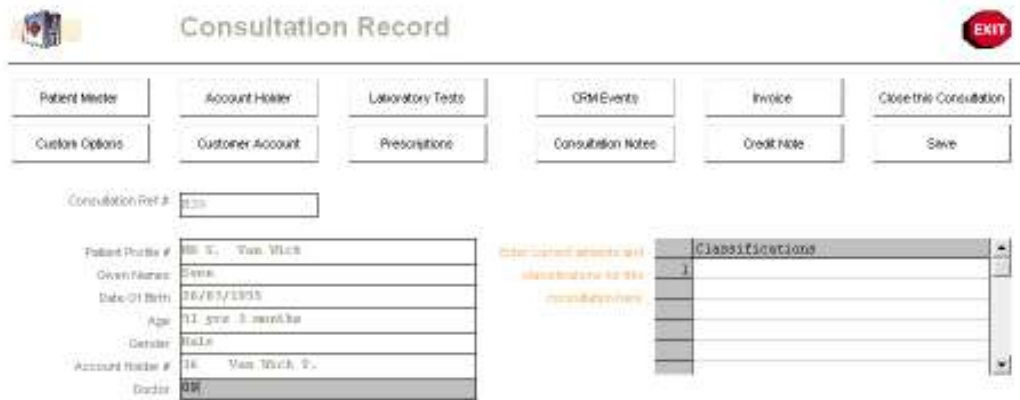


From the CRM Events, you can drill into any event by dbl-clicking on it. In the example shown above, we drill into the Consultation on the 1st line, and this opens the CRM event shown below.



The CRM Event shows a drill option also, and when chosen, this will open that Consultation, as shown below.

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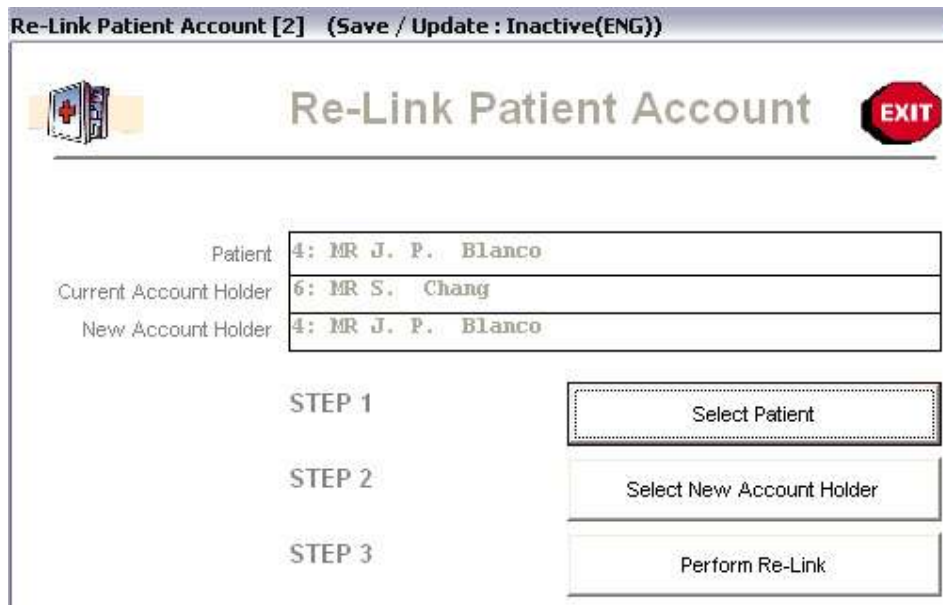


Consultation Ref #	123
Patient Profile #	MR S. Yan, M.D.
Given Name	Yan
Date of Birth	06/07/1955
Age	51 yrs 3 months
Gender	Male
Account Holder #	16 - Yan, M.D.
Doctor	DR

Classifications
1

Of course, from the Consultation, as shown above, you can select Invoice or Credit Note to open those Documents on the Consultation, and then the Invoice or Credit Note can be re-printed.

De-link / Re-Link Patient Account



Re-Link Patient Account [2] (Save / Update : Inactive(ENG))


Patient	4: MR J. P. Blanco
Current Account Holder	6: MR S. Chang
New Account Holder	4: MR J. P. Blanco

STEP 1: Select Patient

STEP 2: Select New Account Holder

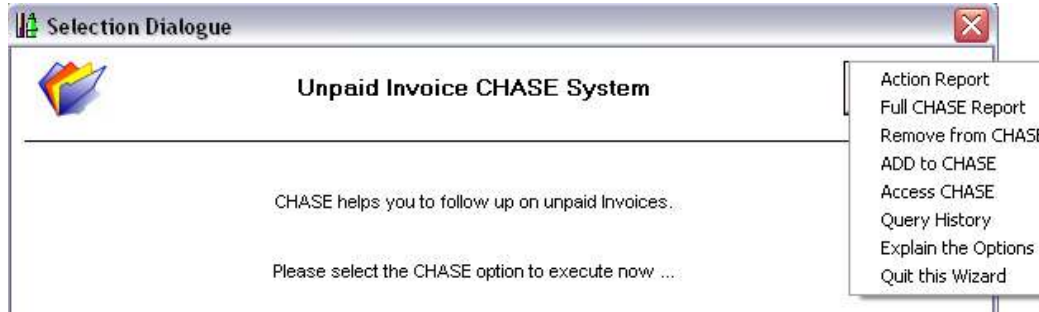
STEP 3: Perform Re-Link

Re-linking of a Patient record to a different Account Holder is performed in 3 easy steps. In the example shown above, steps 1 and 2 are already performed, and in this case, the Patient was linked to the wrong account (as can clearly be seen) and is being re-linked to the correct Account.

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Invoice Payment Chase

The Invoice Payment Chase wizard is shown below, but not further discussed here, as there is a separate User Manual dealing exclusively with this function. Invoice Payment Chase is essentially a Debt Collection utility.



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