

# Accounts and Claiming



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Billing History

## Patient Billing History:

- View invoices and payments for individual patients only (excludes related patients for 'head of family')
- View all billing types including Medicare, DVA, patient, head of family, WorkCover and 3<sup>rd</sup> parties
- Create a new account for the patient
- Open and edit patient details
- Pay, reprint, cancel, write off and adjust invoices and reverse payments

## Account Billing History:

- View invoices / payments for individual and related patients (e.g., accounts billed to 'head of family'), Account Holders (e.g. health funds) and Contacts
- Only shows invoices billed to patient or head of family (does not show items billed to Medicare or 3<sup>rd</sup> parties)
- Create a new account (for patient only)
- Pay, reprint, cancel, write off and adjust invoices and reverse payments

Correcting Errors

## When to **adjust** an account:

- To change item numbers
- To change the biller type
- To change the invoice amount
- To change the service text / invoice notes
- Billed against incorrect location

## When to **cancel** an account:

- Billed against incorrect provider
- Billed against incorrect service date
- Billed to the incorrect patient

## When to **write off** an account:

- Writing off debt (transferred to collection agency)
- Can't contact patient anymore
- Uneconomical to collect (small amount)
- At the provider's request (e.g., overbilled MBS items)

Adjustments

## Unpaid accounts / items sent to Medicare:

- Invoices can be adjusted, cancelled or written off while unpaid

## Paid accounts:

- Payments must be reversed *before* an invoice can be adjusted, cancelled or written off

## Payments and Deposits:

- Payments shown in blue background
- Deposits and Payment Reversal Credits shown with green background

## Adjustments, Refunds and Reversals:

- Adjustments, refunds and payment reversals shown in red background
- Deposit refunds shown in yellow

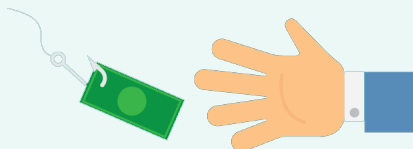
## Cancellations:

- Cancelled invoices shown in purple text

Online Claiming

## Medicare Online Claiming process for bulk billing:

1. **Create and send a new batch** – batch statuses:
  - **Unpaid** = batch sent; no payment / report received yet
  - **Received** = batch sent and processed, not all services paid
  - **Reconciled** = every service fully paid, or errors returned
2. **Check for payments** – service statuses:
  - **Sent** = service transmitted to Medicare, but not processed
  - **Not Paid** = service processed but an error has occurred
  - **Paid** = service paid in full by Medicare
3. **Reconcile claims**



## Adjusting rejected items in a batch:

- **Mark as fully paid** – only use when advised by Bp Support, marks item as paid at the amount claimed, not the amount paid
- **Resend invoice** – use to change the invoice significantly, changes status of all unpaid invoice items to 'Resent', can then adjust invoice from Patient Billing History screen
- **Change item number** – change the item number claimed
- **Edit voucher details** – add additional details to the invoice, such as No of patients, Notes, or Not normal aftercare
- **Edit service text** – change or add service text to the item
- **Accept fee of** – use if item has been short paid to mark the item as fully paid instead of resubmitting
- **Change billing** – use if service will not be paid by Medicare or DVA to change the biller and remove from the batch
- **Write off** – writes off service altogether and removes from batch