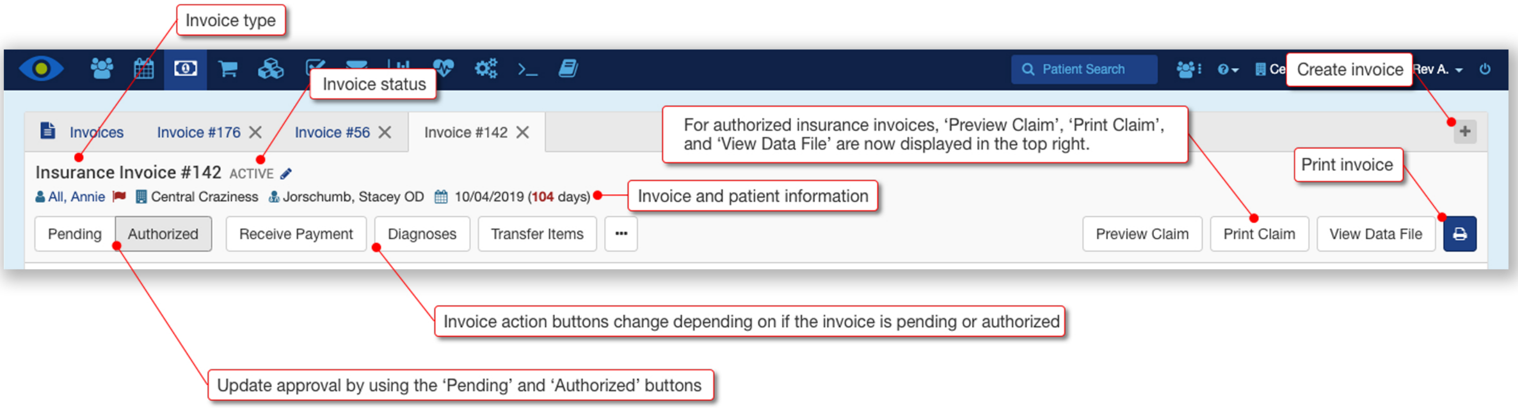
Invoices Quick Guide

revolutionEHR
freedom to focus

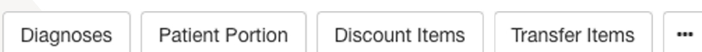
New Invoice Header Always Visible

Now you will be able to see the invoice header at all times, no matter what tab you are working in.

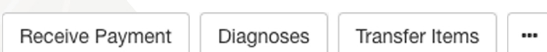


What's New

- **Action buttons only display if the action is allowed.** As before, the action buttons on the invoice will change **depending on if the invoice is pending or authorized.**

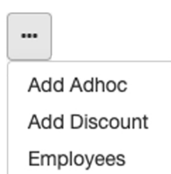


Pending approval status



Authorized status

- **Less frequently used invoice action** items are available under the ellipse.

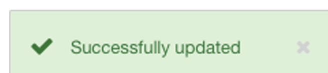


- The **'Save Claim' button** has been **renamed to 'View Data File.'**

- If there is **available credit** associated with a patients' account, the **credit amount will be prominiently displayed** $185.00 Available Credit in the upper right of the invoice.

Improvements

- **A success message** will display in the top right after an item has been added using the 'Add' button. The item will display on the invoice once the 'Select Invoice Item' modal is closed.



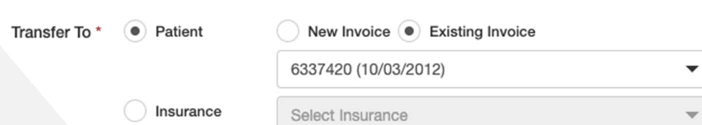
- **No more sliders.** A new **tabbed interface** makes it easy to navigate through sub-sections of the invoice

Invoice tabbed interface

- When an invoice is pending you can **edit** the location, date, status, provider, service date, and finance plan by **selecting the pencil icon.**

- The option to **transfer to a patient's existing invoice or insurance** will **only display** if the patient has a **pending patient invoice or additional active insurance policies.**

No pending patient invoices are available



Pending patient invoices and additional active insurance policies are available