Changing a Carrier
On an Invoice

Once entered, neither the medical nor dental carrier can be changed on an invoice (even if blank). Rather than changing carrier, you’ll need to:

1 - Create a new invoice with the correct carrier
2 - Zero the invoice having the wrong carrier
3 - Move any receipt amounts from the zeroed invoice to the new one.

You can choose to follow this process with only the coverage affected rather than the entire invoice, but the process would be the same.

Detailed Steps

A. Save the Total View (accessed by pressing F8 while you have this invoice pulled up on 641). This way you’ll have the coverage and amounts on hand for comparison later, and possibly for the new invoice.

B. Create a new invoice
   1) Be sure to indicate the correct carrier before pressing Enter.
   2) If in doubt of the carrier number, use the Help key when the cursor is in the carrier field to lookup the carrier numbers.
   3) Enter the correct coverage amounts, including SGIP. (Refer to the copy of the zeroed invoice to enter coverage amounts, including SGIP, if those amounts will not be different for the correct carrier.)

C. If you encounter the following message when creating this new invoice, you must wait until after the next Billing Month-End processing to make your changes, so do not continue these steps.
   “1069 Update not allowed due to Carrier Reconciliation/See FAQ.”

D. Zero the amounts on the invoice with the wrong carrier using the Correct function. If you want to check your entry, press enter again - the “current look” of the invoice is shown.

E. If there were receipts from the zeroed invoice, zero the amounts of the receipt on screen 642 for the zeroed invoice. (You can look up that invoice using the Help key when the cursor is in the invoice number field.)

F. Do not yet exit screen 642, there is still work to do.
   1) Use the Help key to look up and select the number for the new invoice.
   2) Enter a new receipt, using the amounts from the zeroed invoice.
   3) To check your entry, press enter again - the “current look” of the receipt is shown.

G. If you’ve entered the same amount on this receipt as was removed from the old invoice, the batch amount in the upper left of the screen will show $0.00.

H. To check the overall affect of your entries, use the Total View (F8 function key) for both the old and new invoices. (You can use the Help key to find the invoice numbers.)