Do I Use New or Correct for an Invoice?

The New function tries to be helpful by guessing what the invoice amounts and dates “should” be.

The Correct function relies on you to enter what the invoice amounts and dates should be for an existing invoice.

New function

1. It guesses what the invoice “should” be, filling in premium amounts, coverage dates, and the invoice due date, directly from Benefit Maintenance screen 106. Carriers are filled in from Billing Info. screen 118.

2. It is used only for:
   a. Billing a person for amounts already due (remember participants billed for coverage are charged for their premiums ahead of time)
   b. “Changing” medical or dental carriers on an existing invoice**

** Note -- Medical and dental carriers cannot be changed on an invoice. A new invoice will have to be created. Refer to “Change a Carrier on an Invoice” for steps on how to handle.

Correct function

1. It relies on you to enter what the amounts and dates should be.

2. It is used for correcting such items as:
   a. Premium amounts (including SGIP)
   b. Comments
   c. Coverage date and due dates for the invoice

3. It allows you to enter what the actual final amounts should be, not just for this transaction. Ex: Medical premium shows $300 but should be $100. Enter $100, not the difference of $200.

4. Billing Request screen 641 presents the invoice as it currently is, based only on the invoice transactions for this invoice. It does not consider any receipt activity.