

Daily Invoice Report — Dependent Names & Payment Method Totals

The **Daily Invoice Report** now shows two extra things it didn't before: the **dependent's name** on invoices billed under a family record, and a **Totals by Payment Method** table so you can reconcile the day's takings by tender type without leaving the report.

Where to find it

1. Open the **Clinical** app.
2. At the top of the screen, click **Reporting**.
3. Click **Financial Reports**.
4. Click **Daily Invoice**.

Fill in the date range as usual and click **Print PDF** or **Export XLSX**. Nothing about running the report has changed — only what's shown on it.

What's new

Dependent's name now shows

Some patients are captured as a **dependent** under a lead/master patient record — for example, a child on a parent's medical aid, or a family member sharing one account. Lab orders and exams for a dependent are captured under the dependent's own name, not the lead patient's.

Previously the Daily Invoice report only printed the **lead/master patient's** name, which made it hard to match an invoice on the report back to the correct LAB order or exam record for the dependent who was actually seen.

Now both names print: the lead patient's name and, underneath or alongside it, the dependent's name — so the invoice line on the report matches what you see on the LAB order or the exam record.

If a patient is **not** a dependent (the normal case), nothing changes — you'll only see the one name, as before.

Totals by Payment Method

At the bottom of the report there is now a **Totals by Payment Method** table. It groups every payment collected in the date range by tender type (e.g. Cash, Card, EFT, Medical Aid) and shows a subtotal per method, plus a grand total.

Use this to reconcile the till/card machine against what TOMS recorded for the day, without having to open every invoice individually or run a separate report.

- This is the **same report** you've always used — same menu, same wizard, same date-range fields. Only the printed output has more information on it.
- The dependent's name only appears on rows where the patient record is actually linked as a dependent. Most practices will see this rarely; it's there for the family-account cases.
- Payment Method totals only include **payments captured against invoices in the date range** — a payment made today against last month's invoice won't show up in today's totals table (it shows up in the totals for the date the invoice/payment falls in, per the report's normal date filter).

Need a change to this report? Contact Humint support and we'll help.