



**CompuGroup™**  
Medical

# Invoice Billing Information

**February 04, 2025**

**CGMwebPRACTICE™**  
Fully Web-Based Practice Management Suite

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## NOTICE

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## INTRODUCTION

Invoice Billing functionality is designed to handle the situation where a practice provides services to patients and the procedures need to be submitted to the patients' Employers **\*\*{Clients}** on a special invoice. Patients can also receive regular medical services that they are responsible for, that need to be filed to insurance as usual and then receive a separate patient statement for any balance.

*\*\*Throughout this document **Employer** can be considered the equivalent of a **Client**. We understand that generally when you refer to "Invoice Billing" it typically entails billing "Clients" but when performing this type of billing using CGM webPRACTICE and utilizing the tables, the existing terminology uses "Employer", so it matches up to the existing Tables and functions provided.*

The core pieces that drive invoice billing are Department Codes, Employer Codes, special Invoice Billing accounts and using Cases when posting procedures.

Department Codes are used to control who receives the Invoice and a separate Invoice Billing account is automatically created for each Department Code that will contain all the procedures to be billed for each employer. The default values used for the required fields when creating the Invoice Billing account are stored in the *Invoice Billing Integration* function.

An Employer Code is created and linked to the applicable Department Code, so the invoice will include all patients with balances owing for each employer code that is linked to that Department Code.

This requires each patient to have their own account registered and the applicable Employer Code stored. When an Employer Code is added to a patient's account, an invoice billing Case is automatically created because Cases must be used when posting procedures for employers to differentiate which procedures are billed to the Employer (*that is linked to a Department Code*).

The Invoice will contain an Invoice # and Purchase Order number (PO #) if applicable.

This document provides instructions for using Invoice Billing within CGM webPRACTICE. It is intended for CGM webPRACTICE Users that are already experienced and trained in the basic functionality of CGM webPRACTICE. Only the functions specific to Invoice Billing are included in this manual and if you need instructions for other CGM webPRACTICE functionality, refer to *CGM webPRACTICE Help* or contact Customer Service for assistance.

**Note:** This document describes how to perform each step manually. Typically, when an interface is involved, the setup steps, registering patient accounts and storing the procedures in *Unposted Procedures* is automatically done for you.

## SYSTEM REQUIREMENTS

The following requirements must be met when using Invoice Billing in CGM webPRACTICE:

- System Type must be set as Patient Billing.
- Invoice Billing must be activated in each applicable database in the system.
- Must use Department Codes, which controls where the invoice is sent.
- Must create Employers in the Employer Code Table and link them to the Department Code they belong to.
- No Billing Group Codes should be created that start with 'Z'. These are strictly used for Department/Employer Billing Groups.
  - Must use Alpha codes when creating Billing Group codes to ensure sorting capabilities on reports.
- Must create Batches for PO #'s when posting transactions, if applicable.
- Interface – Must send the **Bill Type** to ensure the transactions are processed properly.
  - C or Client = Client/Invoice Billing
  - P or Patient = Patient Billing
  - All other types are treated as Insurance/Third-Party Billing

## SYSTEM SETUP

After the Invoice Billing Functionality has been activated in the system, you will need to:

1. Review the settings in the *Invoice Billing Integration* function.
2. Review the two types of Invoice Billing.
3. Create Department Codes.
4. Create Employer Codes.

## Invoice Billing Integration

The *Invoice Billing Integration* function (*System > Database Maintenance Menu > Integrations > Invoice Billing Integration*) contains the values that will be set when Invoice Billing accounts are automatically created for each Department Code. The Default Value fields should already be completed after the database has been activated. Only the **Responsible Doctor**, **Referral Source** and **Exclude \$0.00 Items on Reports** fields can be edited if needed, the other fields are controlled by the system.

The **Exclude \$0.00 Items on Reports** check box allows you control whether the \$0.00 transactions posted to patient accounts print on the *Daily Register*, *Daily Register to Excel*, *Procedure Journal* and *Transaction Journals to Excel – Procedures*.

Invoice Billing Integration	
<b>Default Values:</b>	
Birth Date	01-01-1900
Sex	Other (0) ▼
Rel to Guarantor	Self (0) ▼
Default Diagnosis	0 NO DIAGNOSIS RECORDED
Responsible Doctor	1 CATHY CASTNER, MD, DO (1) ▼ ✓
Referral Source	0 ✓ NO REFERRAL SOURCE
Exclude \$0.00 Items on Reports	<input checked="" type="checkbox"/>

## Review Types of Invoice Billing

Prior to creating **Department** and **Employer** Codes, review the types of invoice Billing to determine what you will need to create for your billing needs.

**Single Layer Invoice Billing:** Example, Construction Specialists pays for all their employees' procedures.

- A **Department Code** would be created for **Construction Specialists**
- A separate **Employer Code** would also be created for **Construction Specialists** and linked to **Construction Specialists' Department Code**.

Even though everything is handled by a single employer, both codes must be created for the functionality to work properly.

**Two Layer Invoice Billing:** Example, when an invoice needs to be sent to a main organization that has multiple employers under it. Example, XYZ Construction is the main organization and there are multiple employers that they manage.

- A **Department Code** would be created for **XYZ Construction**.
- An **Employer Code** would be created for each employer they manage and be linked to **XYZ Construction's Department Code**.

A single invoice would be printed for XYZ Construction that would contain all the procedures for each employers' employees.

## Create Department Codes

You will need to create Department Codes (*Tables > Department Code Table > Maintain Department Codes*):

- All invoice (*client*) department codes should start with 'C-' and can be up to six characters long.
  - Confirm the **Use for Invoice Billing** check box is selected.
- Any codes that will be used for patient or third-party billing should not have the 'C-' entered in front of the code.

The Department Codes that start with 'C-' and are marked as **Use for Invoice Billing** will control who the invoice will be sent to because when the code is saved, an Invoice Billing account is automatically created for each Department Code, using the information stored for the Department Code and the values from the *Integration*.

Maintain Department Codes		
Linked Employers Select New Next Previous Print Inactivate Reactivate History	Department Code	C-LAND ✓
	Description	LANDSCAPING INC
	Address Line One	12345 W EVERGREEN WAY
	Address Line Two	
	Zip Code	85021
	City	Phoenix
	State	Arizona (AZ) <input type="button" value="Validate Address"/>
	Use for Invoice Billing	<input checked="" type="checkbox"/>
	Invoice Billing Account #	26834



Since Employer Codes will be linked to each Department Code, you can view a list of the codes using the **Linked Employers** Action Column button.

Linked Employers - C-LAND - LANDSCAPING INC	
Employer Code ▼	Employer Name
EAST	EASTERN LANDSCAPING
WEST	WESTERN LANDSCAPING

### Create Employer Codes

You will need to create Employer Codes (*Tables > Employer Code Table > Maintain Employer Codes*) for each employer.

#### Maintain Employer Codes

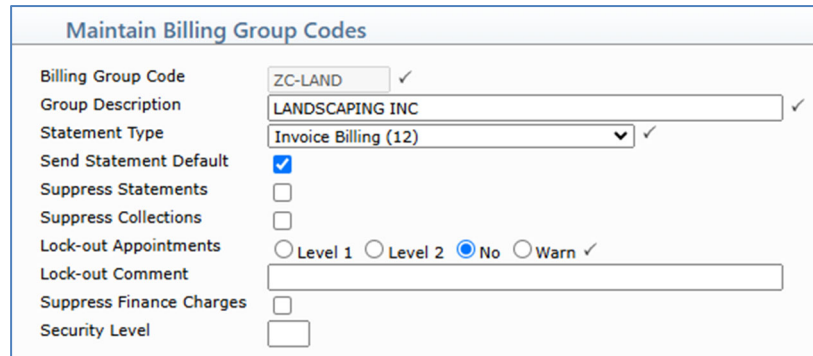
Employer Code	<input type="text" value="WEST"/> ✓	
Employer Name	<input type="text" value="WESTERN LANDSCAPING"/> ✓	
Address Line One	<input type="text" value="22541 W ROCK WAY"/>	
Address Line Two	<input type="text"/>	
Zip Code	<input type="text" value="85026"/>	
City	<input type="text" value="Phoenix"/>	
State	<input type="text" value="Arizona (AZ)"/> ▼	<input type="button" value="Validate Address"/>
Contact Phone	<input type="text" value="602-277-6277"/>	
Contact Fax	<input type="text"/>	
Contact Name	<input type="text"/>	
Department Code	<input type="text" value="C-LAND"/> <input type="text" value="LANDSCAPING INC (C-LAND)"/> ▼	
Use for Invoice Billing	<input checked="" type="checkbox"/>	
Invoice Billing Account #	<input type="text" value="26834"/>	

Complete the **Name**, **Address** and **Contact** information fields and then select the **Department Code** this Employer should be linked to if this Employer is to be used for Invoice Billing.

- **Use for Invoice Billing** - If you selected a **Department Code** - after you click **Save**, the **Use for Invoice Billing** check box will be selected and Informational Only.
- **Invoice Billing Account #** - If you selected a **Department Code**- after you click **Save**, the Invoice Billing account for the selected Department will display in the **Invoice Billing Account #** field.

## BILLING GROUP CODES

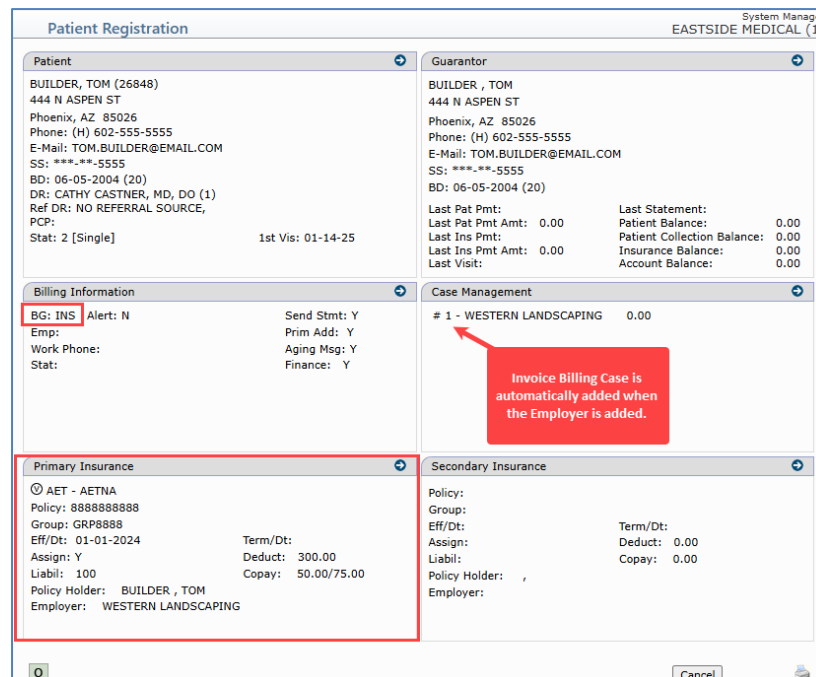
When Department Codes and Employer Codes are created, a matching Billing Group Code starting with Z followed by the Department/Employer code will be automatically created in the background. For example, 'ZC-LAND'. The 'Z' Billing Group Codes will automatically have the custom **Statement Type (12)** – **Invoice Billing** set.



## PATIENT ACCOUNTS

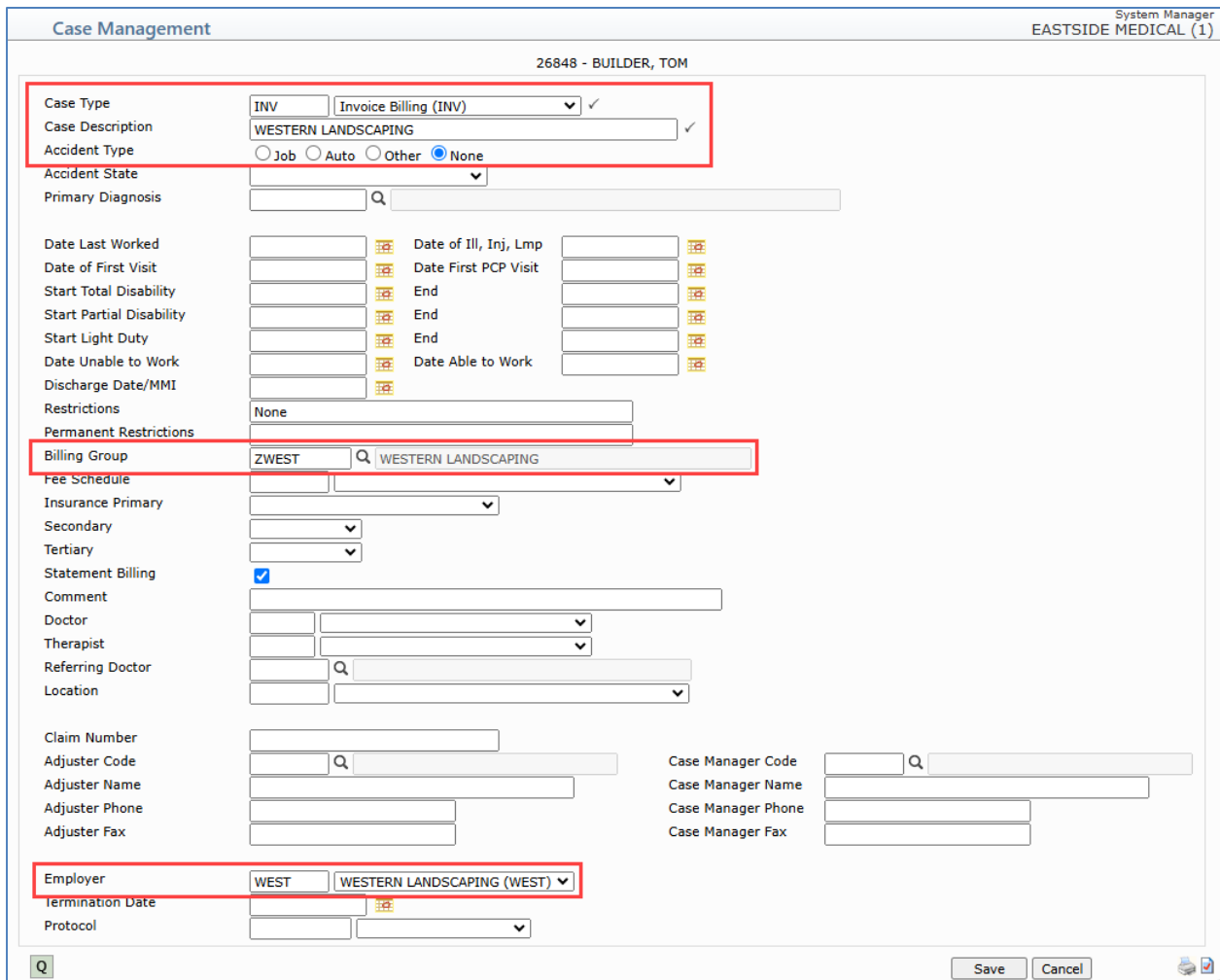
When you register a patient account, you should:

- Enter the Billing Group – If the patient account will be used for both invoice and non-invoice procedures enter the main Billing Group (Ex: INS) on the *Billing Information* screen. If the account will only be used for invoice procedures, enter the Billing Group of your choice.
- Enter the patient's insurance information if the patient account will be used for both invoice and non-invoice procedures.
- Add the Employer.



The Invoice Billing Case will be automatically created for the Employer, after the patient has been registered. The following fields will be set:

- **Case Type** = INV - Invoice Billing
- **Case Description** = Employer Name
- **Accident Type** = None
- **Billing Group** = matching Employer Billing Group that is linked to the Employer Code
- **Employer Code** = Employer code you just added to the account.



The screenshot shows the 'Case Management' window for '26848 - BUILDER, TOM'. The form contains the following fields and values:

- Case Type:** INV (selected), Invoice Billing (INV) (dropdown), ✓
- Case Description:** WESTERN LANDSCAPING (dropdown), ✓
- Accident Type:** Job, Auto, Other, None (radio buttons, None selected)
- Billing Group:** ZWEST (dropdown), WESTERN LANDSCAPING (dropdown)
- Employer:** WEST (dropdown), WESTERN LANDSCAPING (WEST) (dropdown)

Other fields include Accident State, Primary Diagnosis, Date Last Worked, Date of First Visit, Start Total Disability, Start Partial Disability, Start Light Duty, Date Unable to Work, Discharge Date/MMI, Restrictions, Permanent Restrictions, Fee Schedule, Insurance Primary, Secondary, Tertiary, Statement Billing (checked), Comment, Doctor, Therapist, Referring Doctor, Location, Claim Number, Adjuster Code, Adjuster Name, Adjuster Phone, Adjuster Fax, Case Manager Code, Case Manager Name, Case Manager Phone, and Case Manager Fax.

If you need to use alternate fees for this Employer, you should enter the **Fee Schedule** in the Case, so the correct amounts populate for procedures in *Procedure Entry*.



## INVOICE BILLING ACCOUNTS

Each time a Department Code is created, a corresponding Invoice Billing patient account is automatically created. These accounts are special because:

- They contain all the procedures that will be included on the invoice.
- You cannot post procedures directly to an Invoice Billing account.
- They will not contain any Case information and you will be prevented from entering any.
- The Action Column buttons have been removed with the exception of **History**.
- The Billing Group Code created for the Department code will be stored on the account. For example, 'ZC-LAND' - to allow the printing of invoices and generating reports sorted by Billing Groups.
- They will not contain any insurance information and you will be prevented from entering any.

Change Patient Data
System Manager  
EASTSIDE MEDICAL (1)

History

<b>Patient</b> LANDSCAPING INC (26834) 12345 W EVERGREEN WAY Phoenix, AZ 85021 Phone: (H) E-Mail: SS: BD: 01-01-1900 (125) DR: CATHY CASTNER, MD, DO (1) Ref DR: NO REFERRAL SOURCE, PCP: Stat: <span style="float: right;">1st Vis: 01-09-25</span>	<b>Guarantor</b> LANDSCAPING INC , 12345 W EVERGREEN WAY Phoenix, AZ 85021 Phone: (H) E-Mail: SS: BD: 01-01-1900 (125) Last Pat Pmt: <span style="float: right;">Last Statement:</span> Last Pat Pmt Amt: 0.00 <span style="float: right;">Patient Balance: 0.00</span> Last Ins Pmt: <span style="float: right;">Patient Collection Balance: 0.00</span> Last Ins Pmt Amt: 0.00 <span style="float: right;">Insurance Balance: 0.00</span> Last Visit: <span style="float: right;">Account Balance: 0.00</span>
<b>Billing Information</b> BG: ZC-LAND Alert: N <span style="float: right;">Send Stmt: N</span> Emp: <span style="float: right;">Prim Add: N</span> Work Phone: <span style="float: right;">Aging Msg: N</span> Stat: <span style="float: right;">Finance: N</span>	<b>Case Management</b>
<b>Primary Insurance</b> Policy: Group: Eff/Dt: <span style="float: right;">Term/Dt:</span> Assign: <span style="float: right;">Deduct: 0.00</span> Liabil: <span style="float: right;">Copay: 0.00</span> Policy Holder: Employer:	<b>Secondary Insurance</b> Policy: Group: Eff/Dt: <span style="float: right;">Term/Dt:</span> Assign: <span style="float: right;">Deduct: 0.00</span> Liabil: <span style="float: right;">Copay: 0.00</span> Policy Holder: , Employer:

tasks  
 inbox (8)  
 calculator  
 calendar  
 rolodex  
 cue cards  
 help  
 support

Q Cancel

## POSTING PROCEDURES FOR INVOICE BILLING

### Using Purchase Orders (PO's)

If you need to enter PO numbers for procedures for specific patients, you should create a **Batch #** for each individual purchase order and select the Batch when posting. You should start all PO Batch numbers with the letters 'PO'.

**Create a Batch**

Batch Number

Default Last Batch

### Unposted Procedures

If the data is received via an interface, the first step to posting procedures would be to access *Unposted Procedures* and follow the normal process to select patients and post the procedures.

Unposted Procedures											System Manager EASTSIDE MEDICAL (1)					
	Sta	Source	Account	Patient Name	Procedure Description	Superbill	Dept	P	Dr	I	Dr	Loc	DOS	CPT	Amt	ICD-10
<input type="checkbox"/>	Procedure Entry		26727	FLOWER, PANSY <i>Case: 1 - RUBY'S FLOWERS</i>	DRUG TEST PRSMV INSTRMNT		C-FLR	1	1	1			12-27-24	80306	400.00	Z03.89
<input type="checkbox"/>	Procedure Entry		26818.1	CRASH, ANA <i>Case: 1 - SEARS</i>	URINALYSIS NONAUTO W/SCOPE		C-G1	1	1	1			11-14-24	81000	25.74	Z02.1
<input type="checkbox"/>	Procedure Entry		26819.1	HARRIS, ANA <i>Case: 1 - SKI</i>	URINALYSIS NONAUTO W/SCOPE		C-M1	1	1	1			11-14-24	81000	25.74	Z02.1
<input type="checkbox"/>	Procedure Entry		26830	NEST, CHRISTIAN <i>Case: 1 - YSL WORDSTORM</i>	DRUG TEST PRSMV INSTRMNT		C-NORD	1	1	1			01-14-25	80306	500.00	W53.01XA
<input type="checkbox"/>	Procedure Entry		26848	BUILDER, TOM <i>Case: 1 - WESTERN LANDSCAPING</i>	DRUG TEST PRSMV INSTRMNT		C-LAND	1	1	1			01-14-25	80306	400.00	Z02.1

You should always check if any un-registered patients exist from the interface data to ensure those accounts are cleaned up.

Un-Registered Patients										System Manager EASTSIDE MEDICAL (1)	
Refresh	Patient Name	SSN	Date of Birth	Sex	Dr	Loc	Source	Unposted Procedures			
<input type="button" value="Print"/>	DIXON, ROBIN	4365	02-05-	F	1	OFF	LDQ	1			



## PATIENT ACCOUNT TRANSACTION HISTORY

When invoice procedures are posted to a patient’s account, they are posted with:

- Zero-dollar charge amounts
- Procedure Code **INV**
- The Description containing the Procedure Code and Procedure Description.
- The Case information so the Department code and Employer Billing Group are tied to the procedures.

System Manager  
EASTSIDE MEDICAL (1)

**Transaction History**

Patient: 26848 - BUILDER, TOM  
 444 N ASPEN ST  
 Phoenix, AZ 85026  
 (H) 602-555-5555

A - All Cases  
 Encounter  
 Date of Service  
 From [ ] Thru [ ] Go  
 Actions...

Encounter 12757 - 01/14/2025

Case 1 - WESTERN LANDSCAPING      Status Open  
 Billing Group ZWEST

ICD-9 Diagnosis Code(s): 0 - NO DIAGNOSIS RECORDED      ICD-10 Diagnosis Code(s): Z02.1 - Encounter for pre-employment examination

Idaho Patient Act

Service Date	Code	Description	\$ Charge	\$ Ins Bal	\$ Pat Bal	\$ Tot Bal	Ins Img
01/14/2025	INV	80306-DRUG TEST PRSMV INSTRMNT	\$0.00	\$0.00	\$0.00	\$0.00	
Totals:			\$0.00	\$0.00	\$0.00	\$0.00	

Last Saved 01/14/2025 02:57PM by MGR

If you review the *Transaction Details*, the Department Code, Name and Invoice Billing Account # display, in addition to the Case.

Transaction History for 26848 - BUILDER, TOM

Accounting Date	01-14-2025	Service Date	01-14-2025
Procedure Code	INV - Employer Responsible	ICD-9:	0
Procedure Amount	0.00 (1@0.00)	ICD-10:	Z02.1
Per Dr/Ins Dr	1 - CATHY CASTNER, MD, DO/1	Encounter ICD-9	0
Ins Dr Taxonomy	Family Medicine Physician (207Q00000X)	DX's	
Location	1 - MAIN OFFICE	Encounter ICD-10	Z02.1
Department	C-LAND - LANDSCAPING INC (26834)	DX's	
Ref Dr		Sup#:	Ins:
Alt. Desc.	80306-DRUG TEST PRSMV INSTRMNT	Batch: P001142025	Asgn: Y
Case	1 - WESTERN LANDSCAPING	Amount Remaining	\$ 0.00
		Claim Hold Date:	
		Claim Hold Reason:	
		Invoice #:	

Acct Date	Date	Code	Description	Dr	Lc	Diagnosis	Amount	Applied	I	Img

Date	Time	Carrier	Action	User	Amount

Close

## INVOICE BILLING ACCOUNT TRANSACTION HISTORY

A copy of the invoice procedures posted to the patient's account are posted the Invoice Billing Account with:

- The actual Procedure Code.
- The Charge amount.
- The Description contains the patient's account number and the Procedure Code description.
- No Case information, since this account can contain multiple patient's procedures that would each contain different Case data, which could amount to hundreds of Cases.

System Manager  
EASTSIDE MEDICAL (1)

**Transaction History**

Patient:  
 26834 - LANDSCAPING INC  
 12345 W EVERGREEN WAY  
 Phoenix, AZ 85021  
 (H)

A - All Cases  
 Encounter  
 Date of Service  
 From [ ] Thru [ ] Go  
 Actions...

Encounter 12756 - 01/14/2025

Case 0 - Not applicable      Status Open  
 Billing Group ZWEST

ICD-9 Diagnosis Code(s):  
 0 - NO DIAGNOSIS RECORDED      ICD-10 Diagnosis Code(s):  
 Z02.1 - Encounter for pre-employment examination

Idaho Patient Act

Service Date	Code	Description	\$ Charge	\$ Ins Bal	\$ Pat Bal	\$ Tot Bal	Ins Img
01/14/2025	80306	26848-BUILDER, TOM :DRUG TEST PRSMV INSTRMNT	\$400.00	\$0.00	\$400.00	\$400.00	
Totals:			\$400.00	\$0.00	\$400.00	\$400.00	

Last Saved 01/14/2025 02:57PM by MGR

If you review the *Transaction Details*, the Department Code, Name and Invoice Billing Account # display. After the invoice has been printed, the Invoice number will also display.

Transaction History for 26834 - LANDSCAPING INC

Accounting Date	01-14-2025	Service Date	01-14-2025
Procedure Code	80306 - DRUG TEST PRSMV INST	ICD-9:	0
Procedure Amount	400.00 (1@400.00)	ICD-10:	Z02.1
Per Dr/Ins Dr	1 - CATHY CASTNER, MD, DO/1	Encounter ICD-9	0
Ins Dr Taxonomy	Family Medicine Physician (207Q00000X)	DX's	
Location	1 - MAIN OFFICE	Encounter ICD-10	Z02.1
Department	C-LAND - LANDSCAPING INC (26834)	DX's	
Ref Dr		Sup#:	Ins:
Alt. Desc.	26848-BUILDER, TOM :DRUG TEST PRSMV INSTRMNT	Batch:	PO01142025    Asgn: Y
		Amount Remaining	\$ 400.00
		Claim Hold Date:	
		Claim Hold Reason:	
		Invoice #:	

Acct Date	Date	Code	Description	Dr	Lc	Diagnosis	Amount	Applied	Img

Date	Time	Carrier	Action	User	Amount

Close



## EDITING UNPOSTED INVOICE BILLING PROCEDURES

When procedures are stored in *Unposted Procedures* and you need to edit any of the information, you will need to perform the following steps to ensure the corrected data is pulled into the encounter prior to posting:

If you need to change the Department linked to the Employer, the Employer or the Billing Group within the Case:

1. Make the necessary corrections.
2. Access the procedures already stored in *Unposted Procedures*.
3. Change the **Case to '0-Not Applicable'** (*the screen will automatically refresh*).
4. Select the Invoice Billing Case again (*the screen will automatically refresh*).
5. Confirm the corrected data populated in the encounter.
6. Post the procedures.

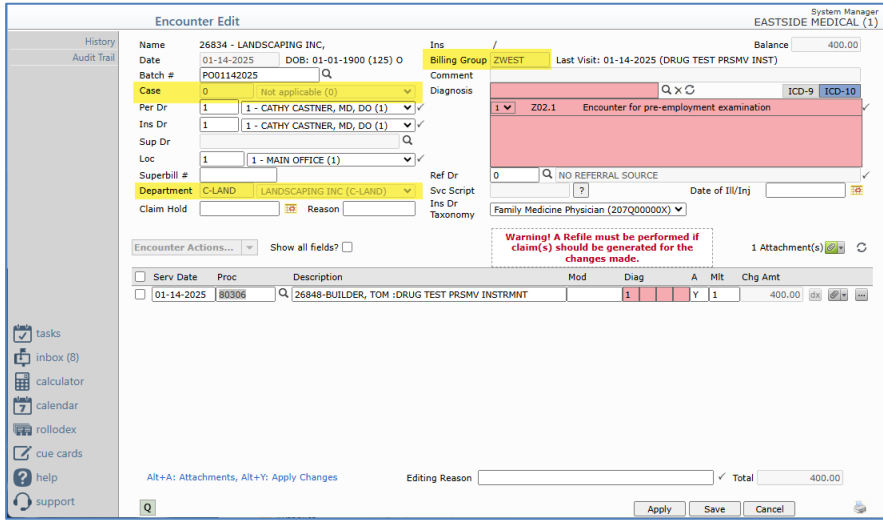
If you need to add a Fee Schedule to the Case:

1. Access the procedures already stored in *Unposted Procedures*.
2. Click the *patient account # link* to access *Change Patient Data*.
3. Edit the Case and add the **Fee Schedule**. Click **Save** to return to *Procedure Entry*.
4. On a new procedure line, enter the same procedure code(s) listed in the screen to have the alternate fee populate.
5. Delete the incorrect procedure code(s) by clicking the 'X' to the left of the procedure line.
6. Post the procedures.

## EDITING POSTED INVOICE BILLING ENCOUNTERS

If you need to edit an encounter on either the patient's account or the invoice billing account, you must make the same edits to both accounts. If you edit the patient's account, the edits will not automatically be made to the invoice billing account and vice versa.

**IMPORTANT: If you need to edit the Department/Employer/Billing Group/Case information, you will need to reverse the encounter on both accounts.** The reason for this is because you are unable to edit any of that information on the invoice billing account, since the Case information is not stored on that account.



At this time, the only way to correct the information is to reverse the encounters on both accounts, make the necessary corrections to the Department/Employer/Billing Group/Case information and then re-post the procedures to the patient's account. This triggers the corrected information and procedures to re-post to the invoice billing account.

## EDITING POSTED NON-INVOICE BILLING ENCOUNTERS

**IMPORTANT: If you need to edit a non-Invoice Billing encounter on the patient's account because it should have been posted as an Invoice Billing encounter, you will need to reverse the encounter and re-posted it.** Follow the normal process so that the charges are posted to the Invoice Billing Account and the patient's account properly using the Case, Department and Employer information.

You will not be able to select any Invoice Billing Cases, Departments or Billing Groups for non-Invoice Billing encounters when editing encounters.

## PRINTING INVOICES AND STATEMENTS

### Statements for Non-Invoice Procedures

When you need to print regular patient statements for non-invoice procedures, you would print for **All** Billing Groups for **Statement Type 6**.

**Generate/Print Patient Statements**

Billing Group (A/S)     All    Select ✓

Billing Group      Q

Statement Type    8 1/2 X 11 Patient Balance Statements (6) ▼ ✓

### Invoices for Invoice Procedures

When you need to print invoices for invoice procedures, you would print for **All** Billing Groups for **Statement Type 12**.

**Generate/Print Patient Statements**

Billing Group (A/S)     All    Select ✓

Billing Group      Q

Statement Type    Invoice Billing (12) ▼ ✓

You can print them in alphabetic or numeric order and should leave the **From Invoice Billing Acct** and **Through Invoice Billing Acct** fields blank, to ensure all invoices print.

**Generate/Print Patient Statements**

Alpha or Numeric     Alphabetic    Numeric

From Invoice Billing Acct   

Through Invoice Billing Acct

**Note:** When you print invoices, if any invoices that were previously printed still have outstanding balances, they will print again using the original invoice number. Any new procedures that have never printed on an invoice will print on a new invoice with a new invoice number.

## EDITING INVOICES

After an invoice has been printed and assigned an Invoice #, you are able to remove procedures from the invoice, but you cannot add more procedures to it. Even if the additional procedures contain the same PO # as the original invoice, they must print on a new invoice.

## INVOICE MANAGEMENT

After invoices have been printed, you can use this function to look-up, view, sort and reprint invoices. When you first access the function, a list of all invoices printed for the past 90 days will be displayed including:

- Invoice #
- Invoice Billing Acct #
- Account Name
- Dept Code – The code associated with the Invoice Billing account
- Purchase Order # (PO) - If one was included on the Invoice
- Invoice Date - The date the invoice was first printed
- Invoice Amount - The total amount owing when the invoice was first printed
- Invoice Balance - The current amount owing for the invoice
- Acct Balance - The total balance currently owing on the invoice billing account

Invoice Management								System Manager EASTSIDE MEDICAL (1)	
Add/Edit Filter		*** Filter Applied ***							
Remove Filter		(From Printing Date = '12-26-2024', Type of Invoices = 'All', )							
Invoice #	Acct #	Acct Name	Dept Code	PO #	Invoice Date	Invoice Amt	Invoice Balance	Acct Balance	
122024.44	26824	NORDSTORM	C-NORD	POAN12262024	12-26-2024	325.00	325.00	1839.32	
122024.45	26826	EXTRA SUPPLIES	C-XXXX		12-26-2024	525.00	525.00	525.00	
122024.47	26824	NORDSTORM	C-NORD		12-26-2024	147.00	147.00	1839.32	
122024.51	26824	NORDSTORM	C-NORD		12-27-2024	980.00	980.00	1839.32	
122024.53	26824	NORDSTORM	C-NORD		12-27-2024	387.32	387.32	1839.32	
012025.59	26796	GETSKII	C-G1	PO01142025	01-14-2025	147.00	147.00	272.74	
012025.60	26796	GETSKII	C-G1		01-14-2025	100.00	100.00	272.74	
012025.61	26820	RENEE	C-R1	PO01142025	01-14-2025	25.74	25.74	77.22	
012025.62	26834	LANDSCAPING INC	C-LAND	PO01142025	01-14-2025	400.00	400.00	400.00	

You can filter the results on the screen by using the **Add/Edit Filter** Action Column button.

### Invoice Management Filter

Invoice Number

From Printing Date  Through

Invoice Billing Acct#

Display Invoices  Paid  Owing  All

Purchase Order



## RE-PRINTING INVOICES

If you need to re-print an invoice, you can either use the Invoice Management function or you can follow the same steps when printing invoices, but you would indicate which Invoice Billing Account you want to re-print.

Generate/Print Patient Statements	
Alpha or Numeric	<input type="radio"/> Alphabetic <input checked="" type="radio"/> Numeric
From Invoice Billing Acct	26722
Through Invoice Billing Acct	26722

# INVOICE SAMPLES

## Single-Layer Invoice Billing

<b>I N V O I C E</b>					
EASTSIDE MEDICAL 3838 N Central Ave Ste 1600 Phoenix, AZ 85012-1950 208-555-0172			PREPARED February 15, 2024 ACCOUNT #: 5555555 Invoice #: 041524.## PO#: BALANCE: 732.00		
Employer Name 4444 Caspar St Phoenix AZ 85036-1045			Amount Enclosed _____		
PAYMENTS MADE ONE WEEK PRIOR TO STATEMENT DATE MAY NOT BE REFLECTED					
DATE	CODE #	DESCRIPTION	CHARGES	PAYMENTS CREDITS	BALANCE
		Patient: Johnson, Noah (Acct #26597) Superbill #:			
12-02-23	99212	OV EST LEV 2	62.00		62.00
		Patient: Smith, Fred (Acct #24321) Superbill #:			
02-02-24	99214	OV EST LEV 4	325.00		325.00
	36415	BLOOD DRAW	10.00		10.00
		Patient: Thompson, Jerry (Acct #23146) Superbill #:			
02-14-24	99214	OV EST LEV 4	325.00		325.00
	36415	BLOOD DRAW	10.00		10.00
<b>TOTALS</b>					<b>732.00</b>
AGING:      Current   30 Day   60 Day   90 Day   120 Day   T O T A L					
732.00					732.00
PLEASE REMIT PAYMENT IMMEDIATELY. For Billing Questions call 602-277-6277.					
PLEASE PAY BALANCE ->					732.00



**Two-Layer Invoice Billing**

<b>I N V O I C E</b>											
EASTSIDE MEDICAL 3838 N Central Ave Ste 1600 Phoenix, AZ 85012-1950 208-555-0172			PREPARED February 15, 2024 ACCOUNT #: 5555555 Invoice #: 041524.## PO#: BALANCE: 732.00								
XYZ Construction 4444 Caspar St Phoenix AZ 85036-1045			Amount Enclosed _____								
PAYMENTS MADE ONE WEEK PRIOR TO STATEMENT DATE MAY NOT BE REFLECTED											
DATE	CODE #	DESCRIPTION	CHARGES	PAYMENTS CREDITS	BALANCE						
Employer: ABC Electical											
Patient: Johnson, Noah (Acct #26597) Superbill #:											
12-02-23	99212	OV EST LEV 2	62.00		62.00						
Patient: Smith, Fred (Acct #24321) Superbill #:											
02-02-24	99214	OV EST LEV 4	325.00		325.00						
	36415	BLOOD DRAW	10.00		10.00						
Employer: MMM Plumbing											
Patient: Thompson, Jerry (Acct #23146) Superbill #:											
02-14-24	99214	OV EST LEV 4	325.00		325.00						
	36415	BLOOD DRAW	10.00		10.00						
TOTALS					732.00						
AGING:	Current		30 Day		60 Day		90 Day		120 Day		T O T A L
										732.00	
PLEASE REMIT PAYMENT IMMEDIATELY. For Billing Questions call 602-277-6277.											
PLEASE PAY BALANCE ->										732.00	