

Invoice Billing Information

November 04, 2026

CGM webPRACTICE

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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 Bill Type received via the interface, 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.

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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 control where the invoice is sent.
- Must create Employers in the Employer Code Table and link them to the Department Code they belong to.
- No Organization/Client Codes should be sent via the lab interface that start with 'C-'. These are strictly reserved for CGM webPRACTICE for Department Codes.
- 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 NOTES

- 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
- No Organization/Client Codes should be sent via the lab interface that start with 'C-'. These are strictly reserved for CGM webPRACTICE for Department Codes. If a 'Patient Bill' message is sent with a 'C-' Dept/Org code and a Collection Site (Employer) code, the 'C-' will be deleted from the Department code in the encounter, (since 'C-' codes are strictly for Client Billing) and the Collection Site (Employer) code will be deleted from the encounter. If you need to switch the message to 'Client Bill', you need to edit the unposted procedures. See the *If you need to change the encounter from patient billing to invoice (client) billing* scenario in the *Editing Unposted Invoice Billing Procedures* section in this document.
- If it is a standard process for charges to be sent through the interface without Diagnosis codes, notify the CGM Interface Team that you would like a **Default Diagnosis** code set, which will eliminate the need to correct each charge individually in *Unposted Procedures*.
- If an interface message comes over as Client billing but is missing the required department code, the message will be automatically switched to Patient billing.

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SYSTEM SETUP

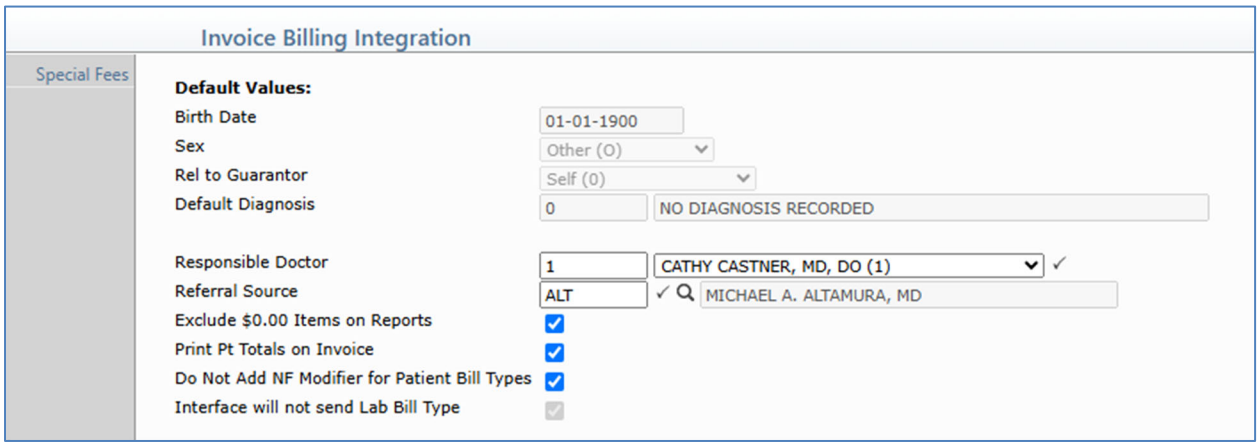
After the Invoice Billing functionality has been activated in the system and prior to the interface being turned on, you will need to:

1. Review the settings in the *Invoice Billing Integration* function.
2. Edit the **Maximum # of Encounters to Display** field in the *Unposted Procedures Integration* function.
3. Review the two types of Invoice Billing.
4. Confirm the Department Codes have been imported from the lab system. **NOTE**: It is critical that the Department Codes are imported before the interface is turned on to ensure you can edit the Department Codes and add Default Fee Schedules, otherwise the charges will be uploaded into *Unposted Procedures* with incorrect charge amounts.
5. Add Default Fee Schedules to the Department Code Table.
6. Have the interface turned on.
7. Create Employer Codes.

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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 and provides other options so you can control certain actions related to Invoice Billing.

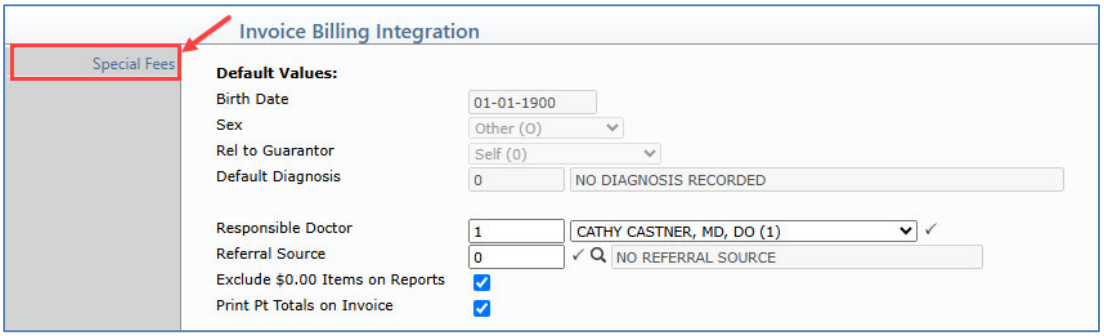


- The Default Value fields should already be completed after the database has been activated. Only the **Responsible Doctor**, **Referral Source** and **Exclude $0.00 Items on Reports** fields can be edited if needed, the other fields are controlled by the system.
- The **Exclude $0.00 Items on Reports** check box allows you control whether the $0.00 transactions posted to patient accounts print on the *Daily Register, Procedure Journal* and *Transaction Journals to Excel – Procedures*.
- With the **Print Pt Totals on Invoice** check box, you can have a total of each patient's charges print on the invoice. A sample invoice for *two-layer billing with patient totals* is included at the end of this document.
- With the **Do Not Add NF Modifier for Patient Bill Types** check box, you can select whether you want NF (No File) modifiers added to charges or not when the **Bill Type** comes over in the interface as **Patient**.
- **Interface will not send Lab Bill Type** – If there is either no interface, or the interface does not send the Lab Bill Type, this check box will be selected. This will allow and require you to manually enter department codes. Department Codes must start with a 'C-'. After a department code is entered, a matching non 'C-' department code will be automatically created in the background.

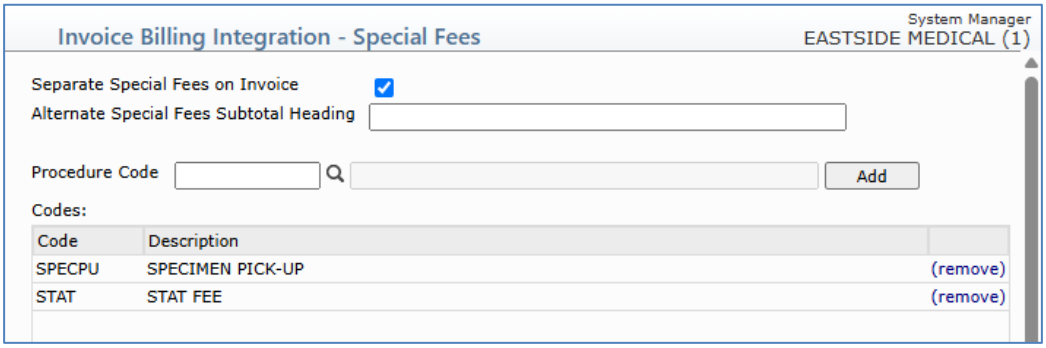
Note: The auto-created non–"C-" department code is a table entry only — it is not marked for Invoice Billing and does not receive its own Billing Group. Only the "C-" department code receives a Billing Group ("ZC-").

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- The **Special Fees** Action Column button allows you to specify if you want specific procedure codes to be separated and subtotaled on invoices. A sample invoice for *two-layer billing with patient totals and special fees* is included at the end of this document.



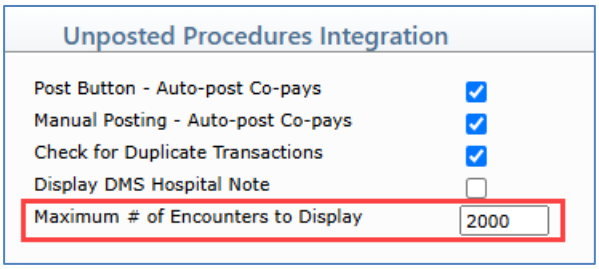
On the Special Fees page, select the **Separate Special Fees on Invoice** check box to activate this functionality. You can specify an **Alternate Special Fees Subtotal Heading**, otherwise the heading on the invoice will print *Special Fees Subtotal*. Next, you can select which procedure codes should be identified as special fees. Each time you select a code, click the **Add** button to the right of the field to immediately add the code to the list which will display on the screen. You can use the '(remove)' link to the right of each code in the list to remove codes. This list will be used to separate the codes into a separate section when you print invoices.



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Unposted Procedures Integration

The *Unposted Procedures Integration* function contains a **Maximum # of Encounters to Display** field that allows you to control the quantity of encounters that will display when you access the *Unposted Procedures* function. This field is blank by default, but it has been found for lab interface clients that deal with very large quantities of encounters, it should be limited to ensure the *Unposted Procedures* page loads quickly. You should enter a value anywhere between 2000 to 4000 to start and adjust as needed in the future. The maximum number you can enter is 9999.



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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.

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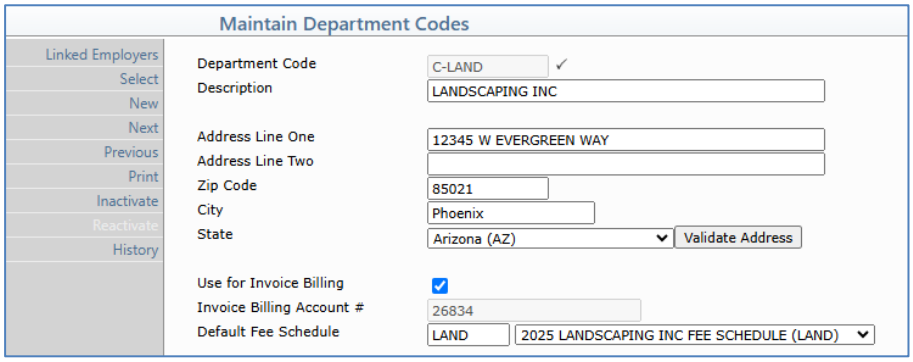
Create Department Codes

You will need to create Department Codes *(Tables > Department Code Table > Maintain Department Codes). (**Note**: If you do a mix of Invoice (Client) billing and insurance/patient billing, the Department Codes will be automatically created by the interface. You will not be able to manually enter Department Codes but can edit them as needed.)*

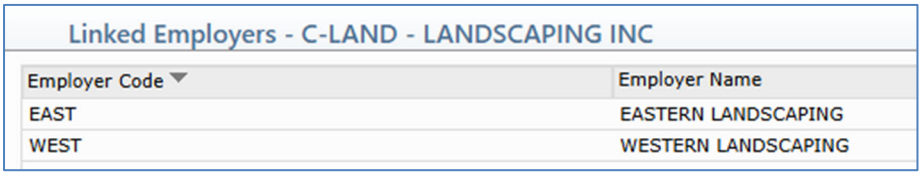
- All invoice (*client*) department codes should start with 'C-' and can be up to ten characters long.
  - Confirm the **Use for Invoice Billing** check box is selected.
- Any codes that will be used for patient or third-party billing should not have the 'C-' entered in front of the code.

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*.

If a Department Code requires alternate fees from your normal fees, add the **Default Fee Schedule**.



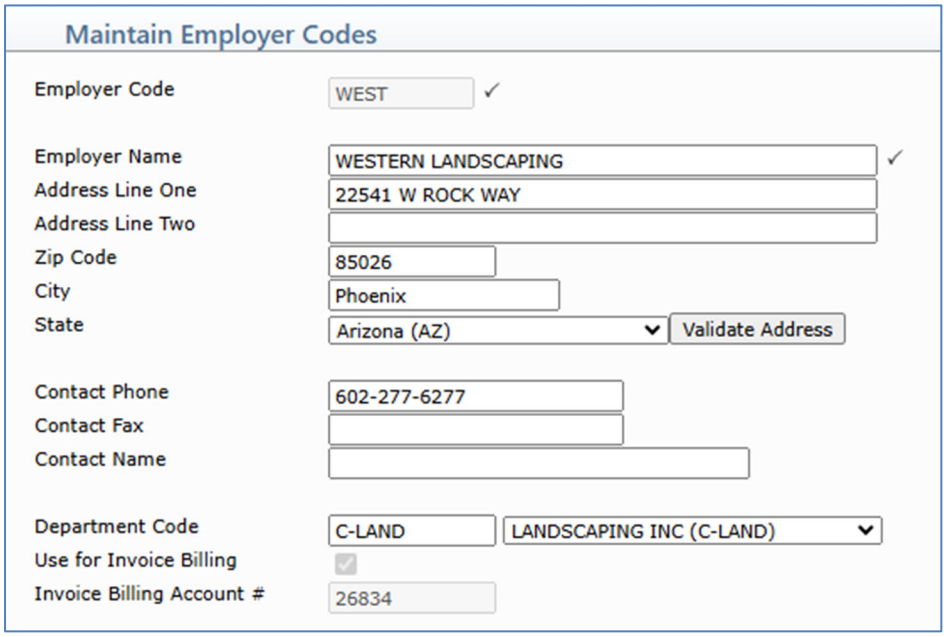
Since Employer Codes will be linked to each Department Code, you can view a list of the codes using the **Linked Employers** Action Column button.



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Create Employer Codes

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



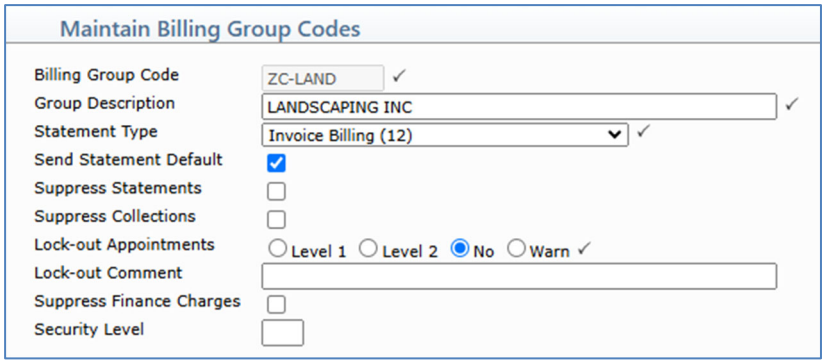
Complete the **Name**, **Address** and **Contact** information fields and then select the **Department Code** this Employer should be linked to if this Employer is to be used for Invoice Billing.

- **Use for Invoice Billing** - If you select 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 select a **Department Code-** after you click **Save**, the Invoice Billing account for the selected Department will display in the **Invoice Billing Account #** field.

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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. Billing Groups created for Department Codes will start with 'ZC-' (for example, 'ZC-LAND') and be stored on the Invoice Billing account. Billing groups created for Employer Codes (for example 'ZWEST') will start with 'Z' and be stored in the Case on the patient's account. The 'ZC-' and 'Z' Billing Group Codes will automatically have the custom **Statement Type (12) – Invoice Billing** set.



The two Billing Group codes are created from **two different tables** and represent the **two layers** of an invoice — they are not two versions of a single code:

Billing Group	Created from	Prefix	Stored on	Carried on the charges on
ZC-<dept> (e.g. ZC-LAND)	Department Code (the "C-" code)	ZC-	The Invoice Billing account (billing information)	The Invoice Billing account
Z<emp> (e.g. ZWEST)	Employer Code	Z	The patient's Invoice Billing Case	The patient account

Purpose. The **ZC-** (Department) Billing Group is the organization/outer layer — it groups the Invoice Billing account so a single invoice can be printed for the department and reports can be sorted by department. The **Z** (Employer) Billing Group is the employer/inner layer — it tags each patient's invoice charges with the employer so that, within a department's invoice, the charges break out by employer.

On the charges. Invoice charges on both the patient account and the Invoice Billing account carry the employer's **Z** Billing Group (from the Case).

Because both Billing Groups are set to Statement Type 12 (Invoice Billing), their charges print on invoices (Statement Type 12) rather than on regular patient statements (Statement Type 6). See Printing Invoices and Statements.

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Example. For Department Code **C-LAND** and Employer Code **WEST** (linked to that department), the system creates Billing Group **ZC-LAND** (stored on the Invoice Billing account) and Billing Group **ZWEST** (stored in the patient's INV Case). No plain "ZLAND" Billing Group is created.

Clarifications (common points of confusion)

- **Is the `ZC-` billing group actually used for the charges on the Invoice Billing account? Yes.** Because the Invoice Billing account cannot hold a Case, its charges inherit the account-level billing group, which is `ZC-<dept>`. So `ZC-` genuinely rides with the Invoice-Billing-account charges.
- **The `Z` group on the Case is the Employer's group.** Correct — it comes directly from the Employer Code (`ZWEST`), not from a department's non–"C-" twin.
- **Does saving a Department Code create a billing group for both the "C-" and the non–"C-" code? No.** Saving a "C-" department code can create a second, non–"C-" department code — but only when the *"Interface will not send Lab Bill Type"* option is enabled — and that non–"C-" code is a table entry only: its Use-for-Invoice-Billing flag and account are cleared, and it does **not** get a billing group. Only one billing group (`ZC-`) is ever created from a department code.
- **So `Z` and `ZC-` are not two halves of one code.** `Z` comes from the Employer table; `ZC-` comes from the Department table.

How the codes are created and stored (lifecycle)

Using Department `C-LAND` and Employer `WEST` (linked to that department) as an example:

1. **Save the Department Code** `C-LAND` → the system creates billing group `ZC-LAND` (Statement Type 12) and automatically creates the Invoice Billing account, storing `ZC-LAND` as that account's billing group.
2. **Save the Employer Code** `WEST` (with a linked Department) → the system creates billing group `ZWEST` (Statement Type 12).
3. **Add Employer `WEST` to a patient** → the system auto-creates an **INV Case** on the patient's account with Billing Group = `ZWEST`, Employer = `WEST`, Case Type = `INV`, and (if defined) the Department's default Fee Schedule.
4. **Post the invoice procedures** → the charge's billing group is resolved as follows: *if the encounter has a Case, use the Case's billing group; otherwise use the account's billing group.*
    - On the **patient account**, the charges carry `ZWEST` (from the Case).
    - On the **Invoice Billing account**, the charges carry `ZC-LAND` — because an Invoice Billing account is not allowed to have a Case, so the charges fall back to the account-level billing group.

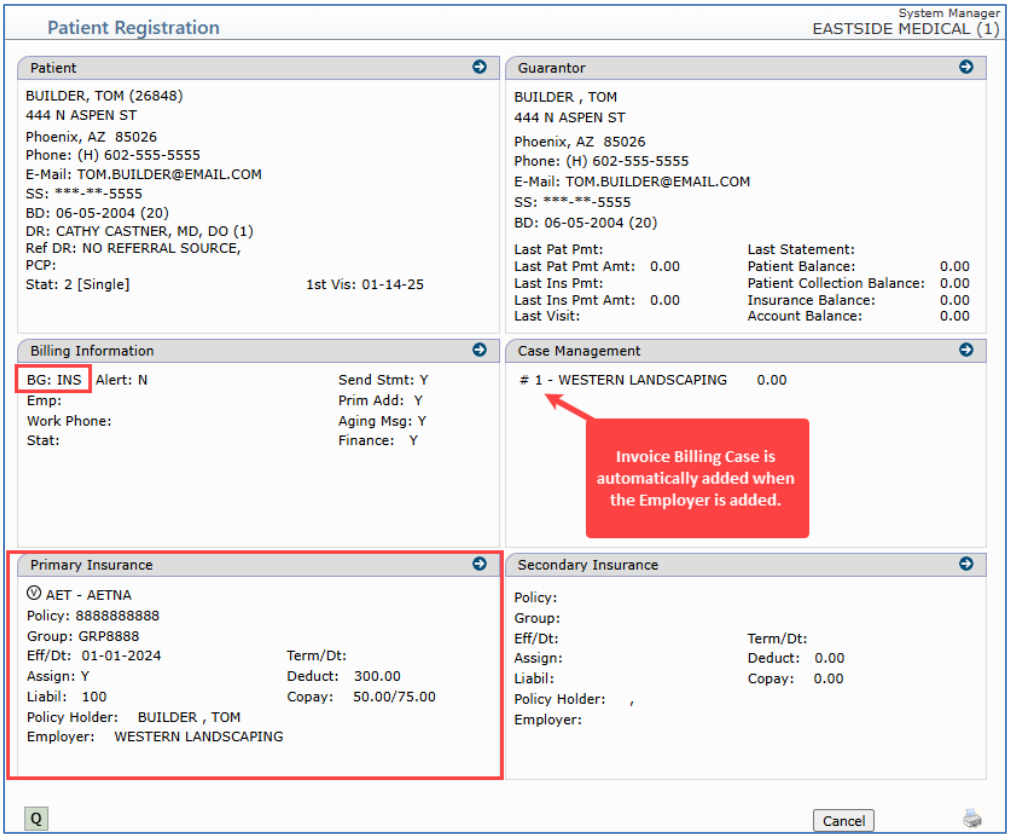
Net result: the two billing group codes that exist for this example are `ZC-LAND` (department) and `ZWEST` (employer). There is no plain `ZLAND`.

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PATIENT ACCOUNTS

When you register a patient account, you should:

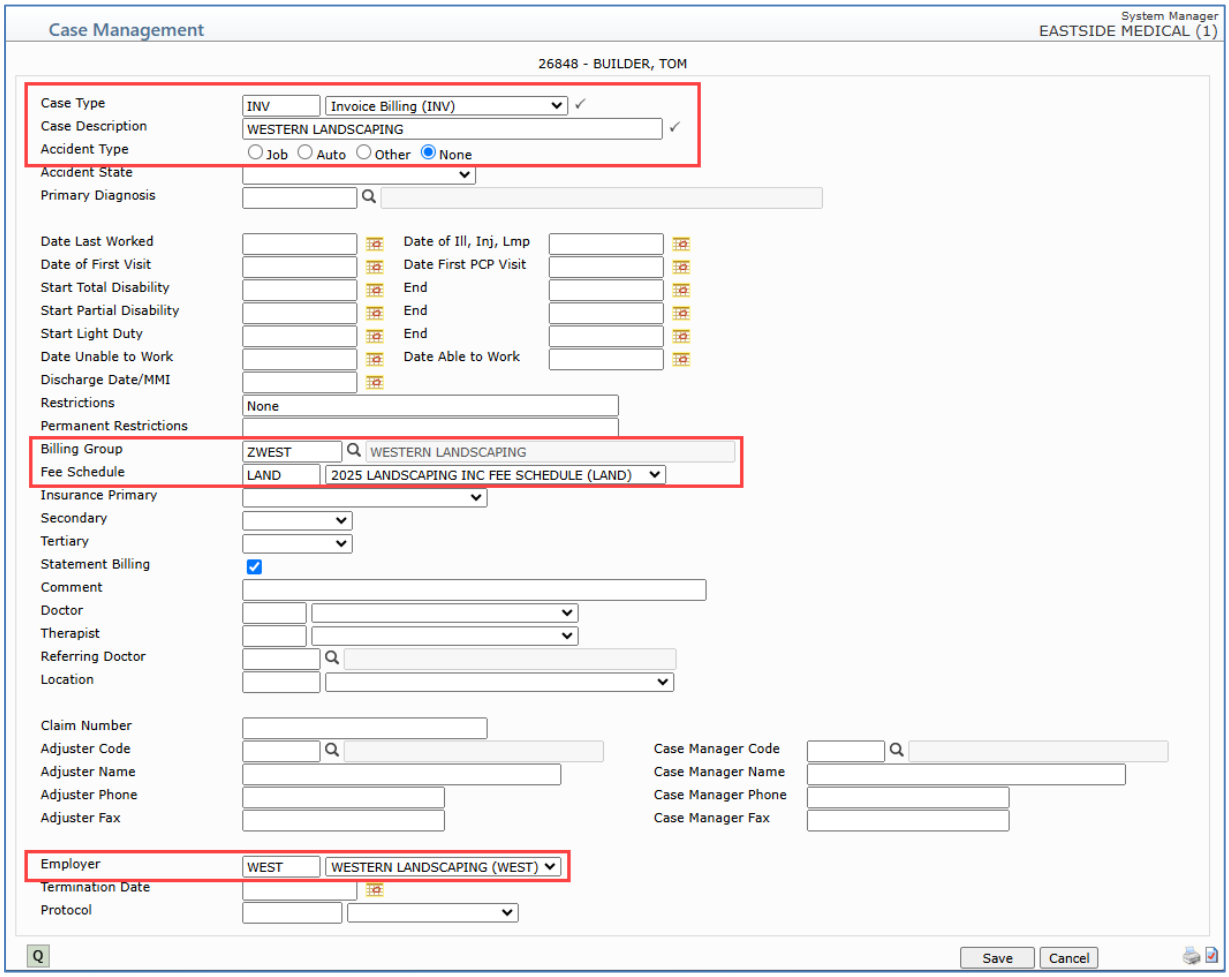
- Enter the Billing Group – If the patient account will be used for both invoice and non-invoice procedures enter the main Billing Group (Ex: INS) on the *Billing Information* screen. If the account will only be used for invoice procedures, enter the Billing Group of your choice.
- Enter the patient's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



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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** = The matching Employer Billing Group that is linked to the Employer Code.
- **Employer Code** = Employer code you just added to the account.
- **Fee Schedule =** The **Default Fee Schedule** for the Department Code linked to the Employer Code, if one exists. This ensures the alternate fees for this Employer will populate for procedures in *Procedure Entry* when this Case is selected.

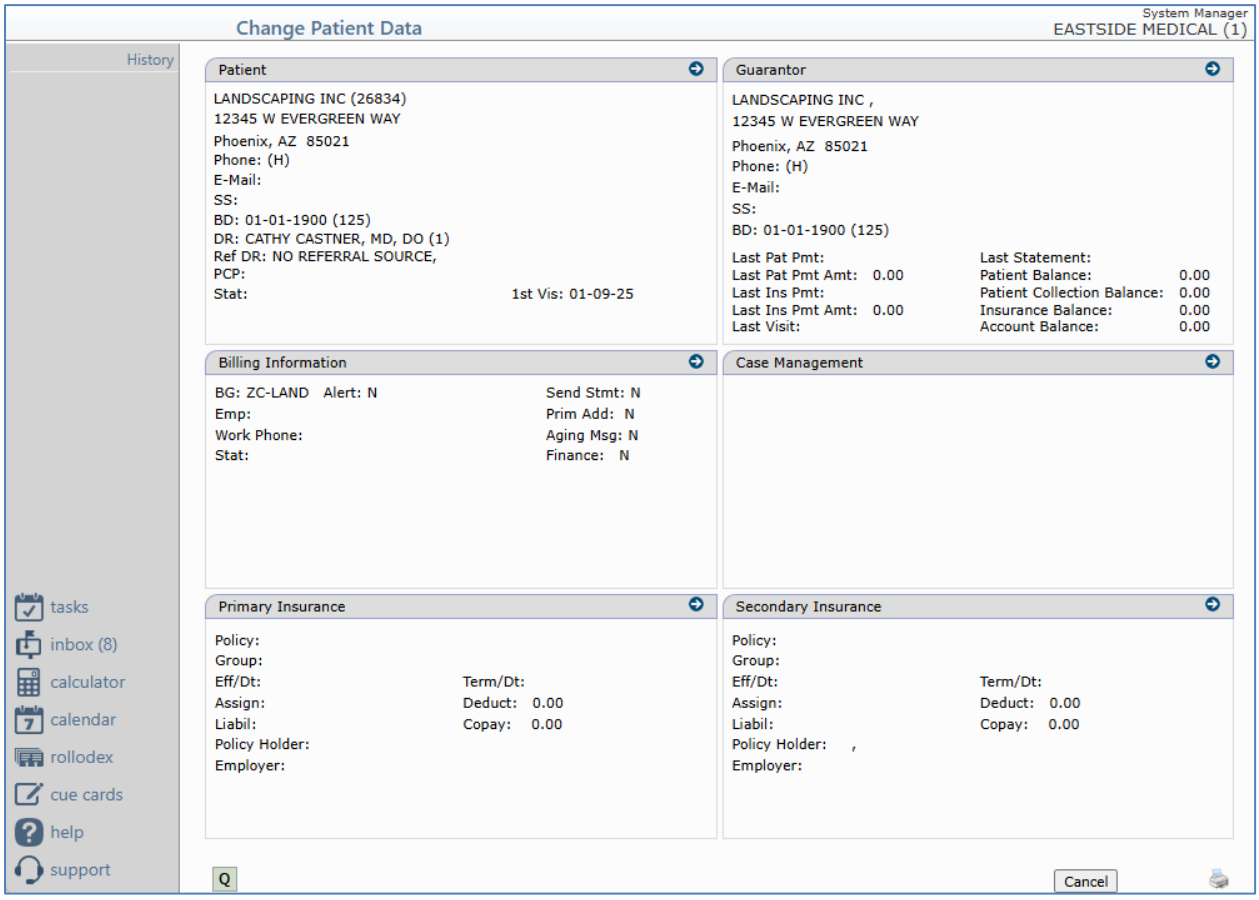


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INVOICE BILLING ACCOUNTS

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.

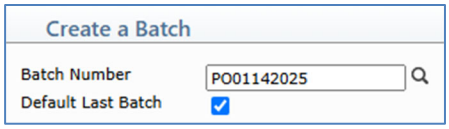


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POSTING PROCEDURES FOR INVOICE BILLING

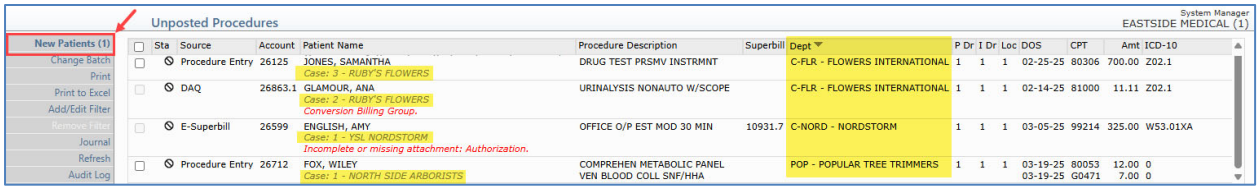
Using Purchase Orders (PO's)

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'.

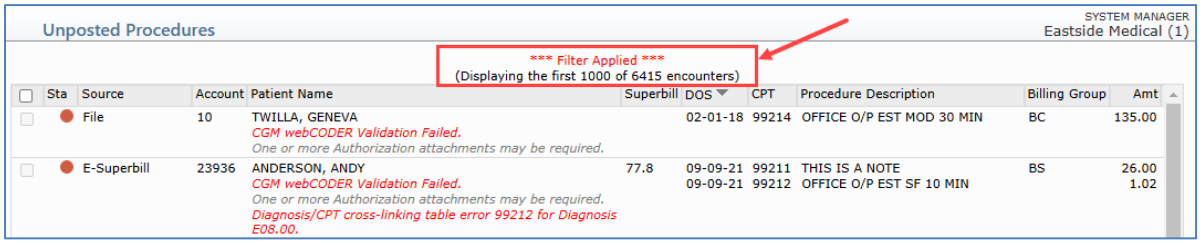


Unposted Procedures

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.



If you entered a value in the **Maximum # of Encounters to Display** field in the *Unposted Procedures Integration,* a Filter will be automatically applied and will only display that quantity of encounters.



If you elected to have the **NF Modifier** added to charges (*in the Invoice Billing Integration)* when the **Bill Type** comes over in the interface as **Patient**, it will be added to any existing modifiers on the charges and not overwrite them.

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



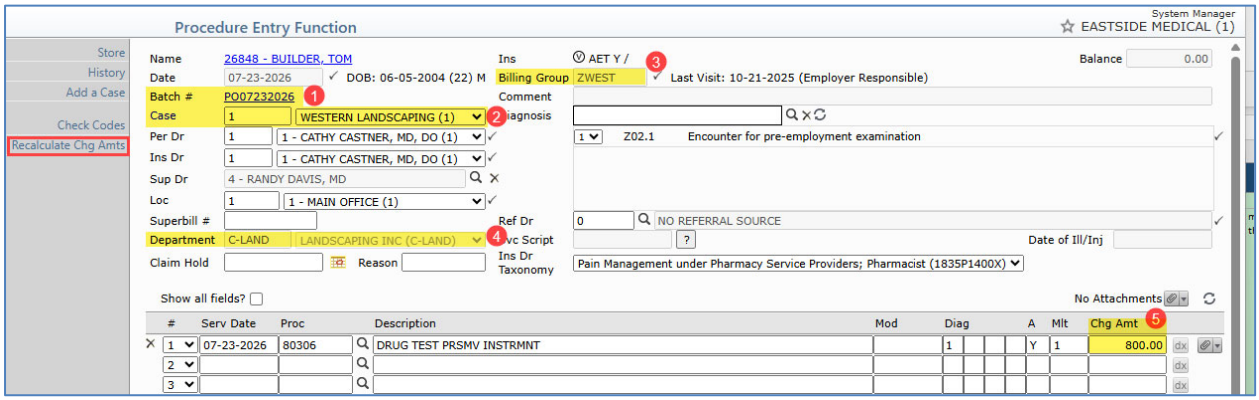
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Procedure Entry

Whether you are entering procedures manually or have selected a patient from *Unposted Procedures,* the following data should be entered (or confirmed) upon accessing *Procedure Entry*:

1. Select the **Batch** for the PO #, if applicable.
2. Select the **Invoice Billing Case** – this is critical to ensure the proper Billing Group, Employer, Department and Fee Schedule (if applicable) are posted with the procedures and it also triggers the Invoice Billing programs to post the procedures to the Invoice Billing account.
3. The **Billing Group** for the Employer displays and cannot be edited. If it is not correct, you would first need to edit the Case on the patient's account to edit the Employer Code and the Billing Group tied to it and then proceed with posting.
4. The **Department** that is linked to the Employer stored in the Invoice Billing Case will default and cannot be edited. If it is not correct, you would first need to edit the Case on the patient's account to edit the Employer Code that the Department is linked to and then proceed with posting.
5. Confirm the **Charge Amounts** are correct. If a **Default Fee Schedule** is stored on the Department Code, it will be automatically added to the **Fee Schedule** field in the Case when it is created by the system. When the charges are first entered or received from the interface and stored in *Unposted Procedures*, the system checks the Case for the **Fee Schedule**. If the Case does not contain a **Fee Schedule**, the system will check for a Fee Schedule in the patient's Billing Information, and if none then reverts to the base procedure prices. If you edit the **Fee Schedule** in the Case, you must click the **Recalculate Chg Amts** Action Column button prior to posting the charges.

   Note: See the *Editing Unposted Invoice Billing Procedures* section for additional information when you need to make edits.



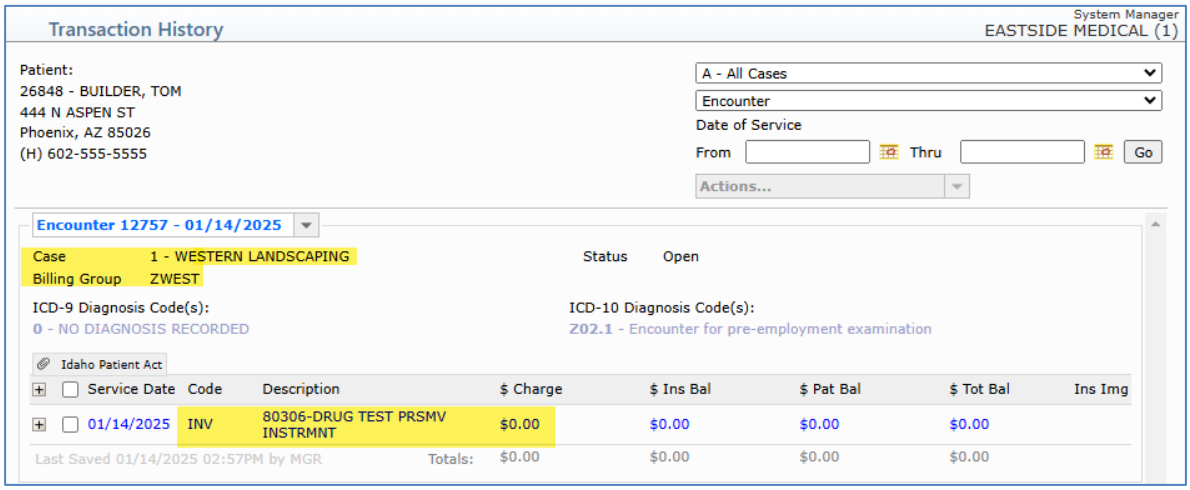
When the procedures are posted to the patient's account, a copy of the procedures is posted to the corresponding Invoice Billing account for the Department. This allows you to see both non-invoice procedures and invoice procedures when you view the Transaction History for a patient. It also allows invoice procedures for multiple patients to be posted to a single Invoice Billing account and print a single Invoice for the Department Code.

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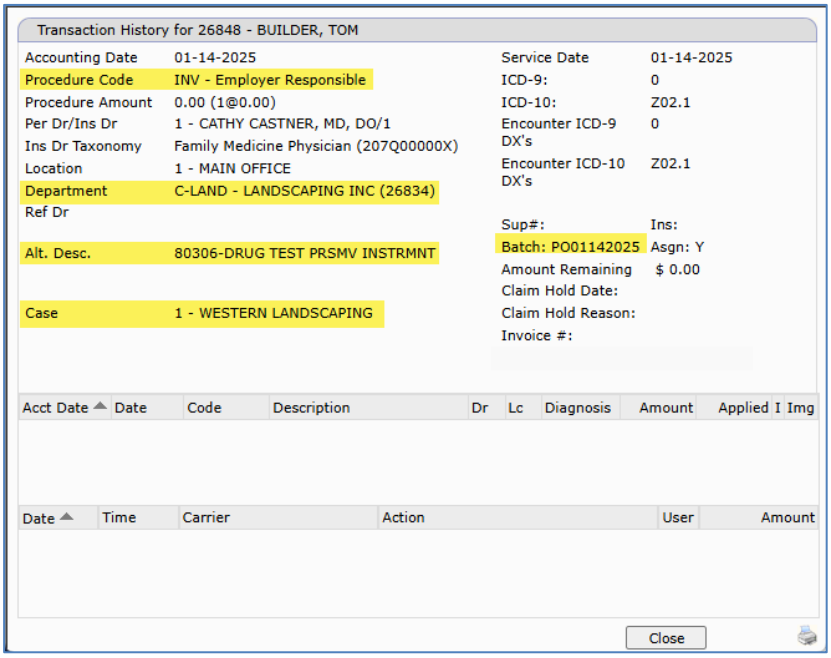
PATIENT ACCOUNT TRANSACTION HISTORY

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.



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

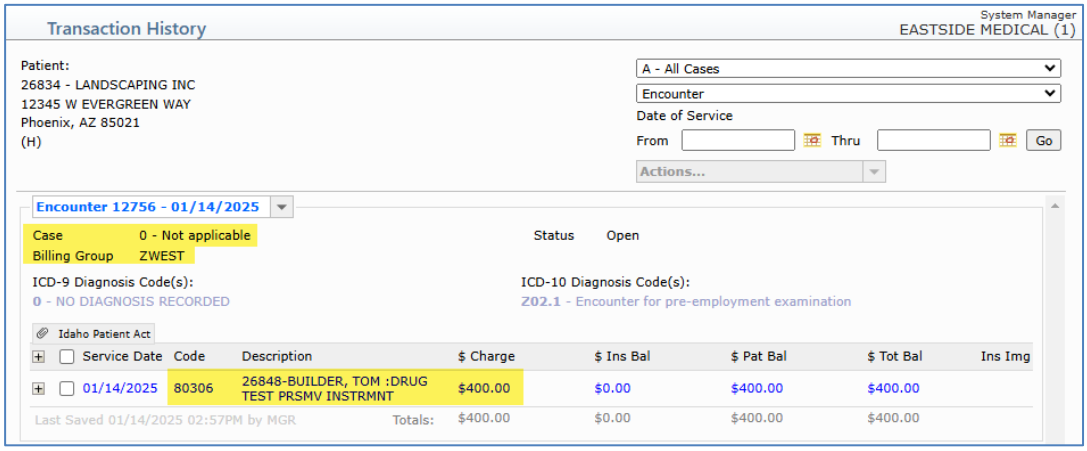


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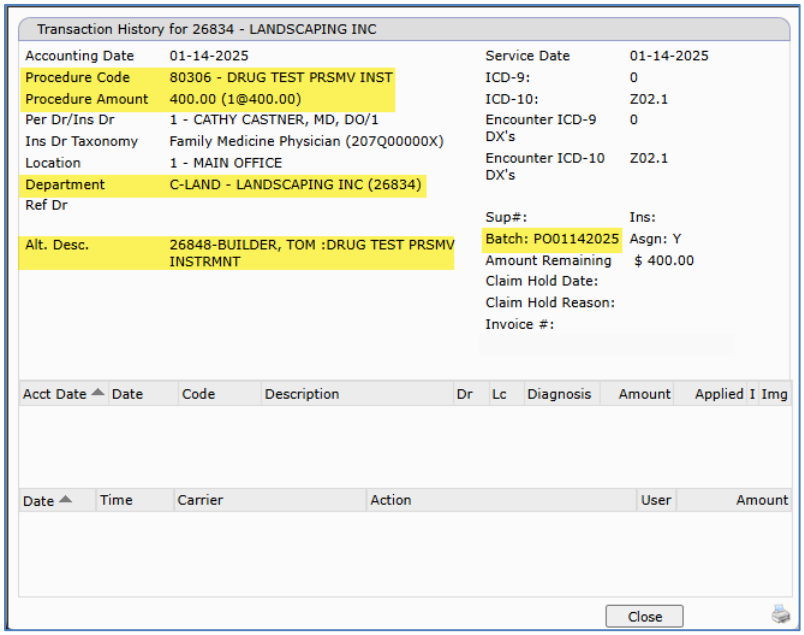
INVOICE BILLING ACCOUNT TRANSACTION HISTORY

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.



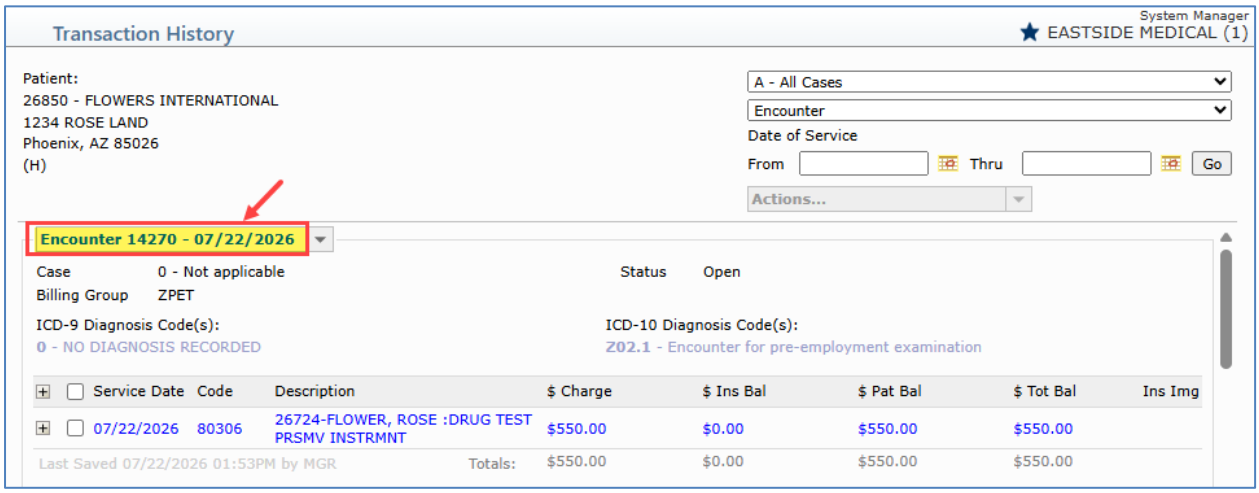
If you review the *Transaction Details*, the Department Code, Name and Invoice Billing Account # display. After the invoice has been printed, the Invoice number will also display.



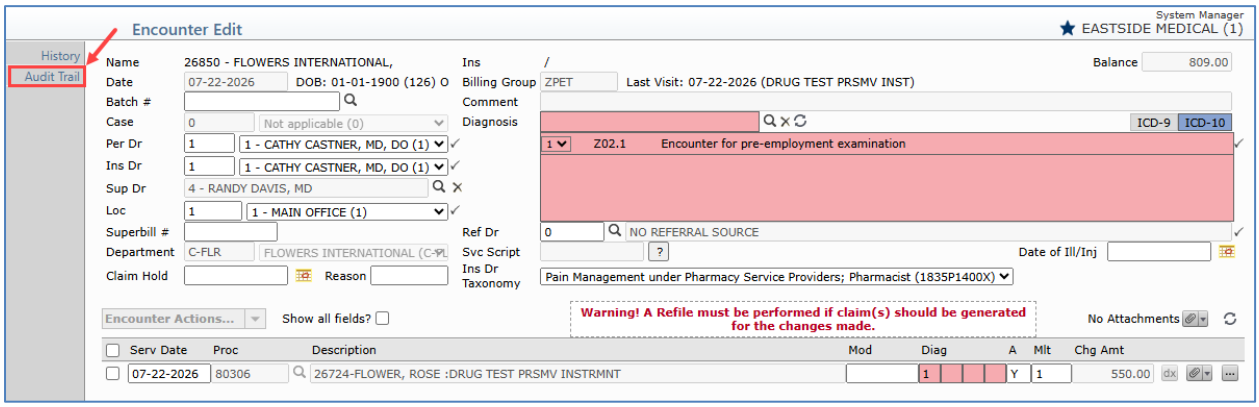
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If you need to know all the various steps from when the charges were first stored on the account and all changes made to them, you can view the **Audit Trail** for the encounter.

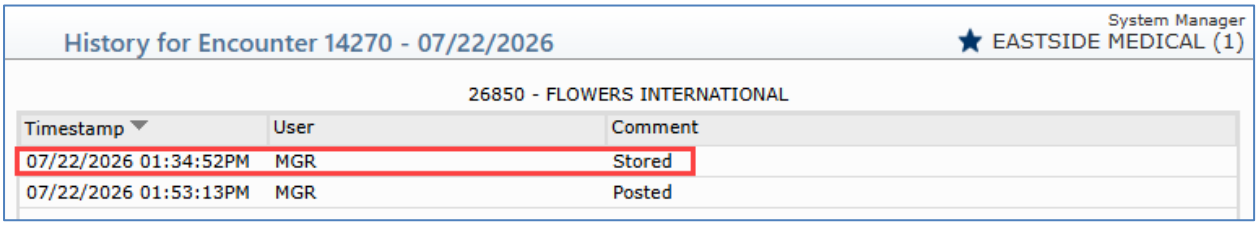
Click the **Encounter ID** to access the charges on the encounter.



The charges will display on the *Encounter Edit* screen. Click the **Audit Trail** Action Column button.

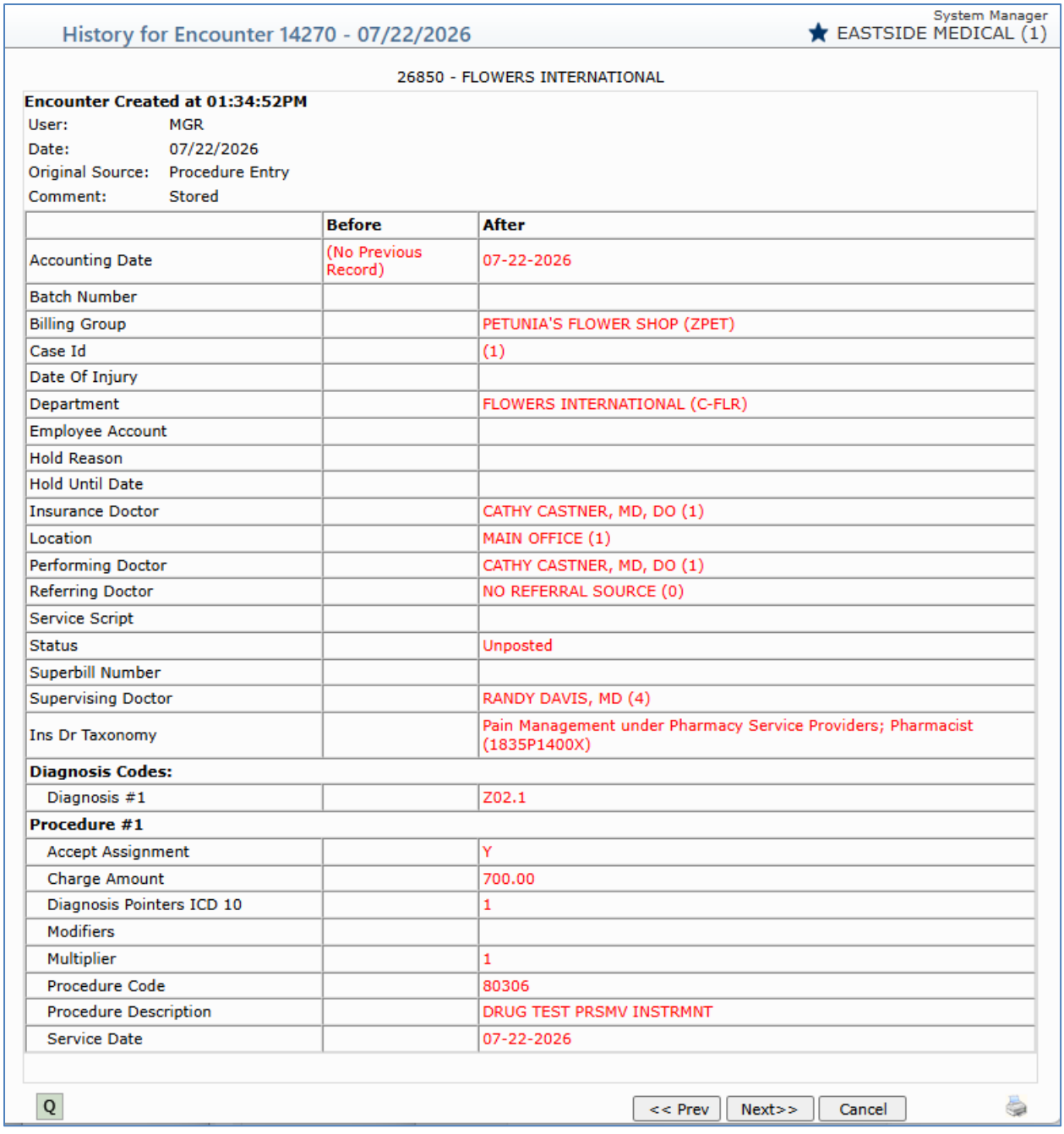


The *Audit Trail* page will display any changes made to the encounter, including the timestamp when the changes were made, the user that made the changes and the comment entered when the change was made if applicable. Click in any row to view the detailed information for the change.



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In the example below, you can see the initial record of when the encounter was created – the **Before** column indicates there was *No Previous Record* and the **After** column displays the data that was entered. Click **Next** to view the details for the next change made to the encounter.



History for Encounter 14270 - 07/22/2026

System Manager
EASTSIDE MEDICAL (1)

26850 - FLOWERS INTERNATIONAL

Encounter Created at 01:34:52PM

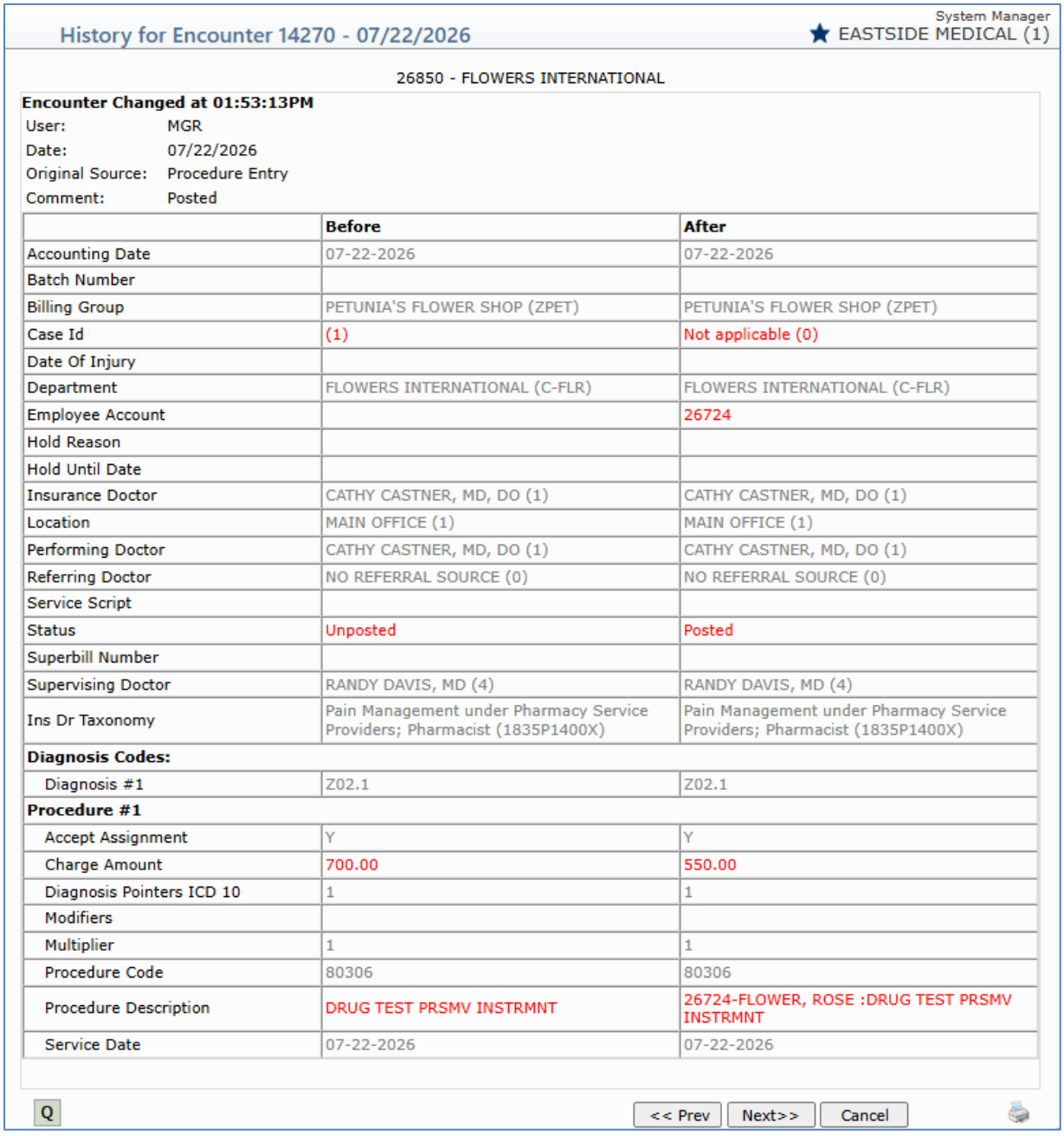
User: MGR
Date: 07/22/2026
Original Source: Procedure Entry
Comment: Stored

	Before	After
Accounting Date	(No Previous Record)	07-22-2026
Batch Number		
Billing Group		PETUNIA'S FLOWER SHOP (ZPET)
Case Id		(1)
Date Of Injury		
Department		FLOWERS INTERNATIONAL (C-FLR)
Employee Account		
Hold Reason		
Hold Until Date		
Insurance Doctor		CATHY CASTNER, MD, DO (1)
Location		MAIN OFFICE (1)
Performing Doctor		CATHY CASTNER, MD, DO (1)
Referring Doctor		NO REFERRAL SOURCE (0)
Service Script		
Status		Unposted
Superbill Number		
Supervising Doctor		RANDY DAVIS, MD (4)
Ins Dr Taxonomy		Pain Management under Pharmacy Service Providers; Pharmacist (1835P1400X)
Diagnosis Codes:		
Diagnosis #1		Z02.1
Procedure #1		
Accept Assignment		Y
Charge Amount		700.00
Diagnosis Pointers ICD 10		1
Modifiers		
Multiplier		1
Procedure Code		80306
Procedure Description		DRUG TEST PRSMV INSTRMNT
Service Date		07-22-2026

Q << Prev Next>> Cancel

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Any changes made will display in red text.



History for Encounter 14270 - 07/22/2026

System Manager
EASTSIDE MEDICAL (1)

26850 - FLOWERS INTERNATIONAL

Encounter Changed at 01:53:13PM

User: MGR
Date: 07/22/2026
Original Source: Procedure Entry
Comment: Posted

	Before	After
Accounting Date	07-22-2026	07-22-2026
Batch Number		
Billing Group	PETUNIA'S FLOWER SHOP (ZPET)	PETUNIA'S FLOWER SHOP (ZPET)
Case Id	(1)	Not applicable (0)
Date Of Injury		
Department	FLOWERS INTERNATIONAL (C-FLR)	FLOWERS INTERNATIONAL (C-FLR)
Employee Account		26724
Hold Reason		
Hold Until Date		
Insurance Doctor	CATHY CASTNER, MD, DO (1)	CATHY CASTNER, MD, DO (1)
Location	MAIN OFFICE (1)	MAIN OFFICE (1)
Performing Doctor	CATHY CASTNER, MD, DO (1)	CATHY CASTNER, MD, DO (1)
Referring Doctor	NO REFERRAL SOURCE (0)	NO REFERRAL SOURCE (0)
Service Script		
Status	Unposted	Posted
Superbill Number		
Supervising Doctor	RANDY DAVIS, MD (4)	RANDY DAVIS, MD (4)
Ins Dr Taxonomy	Pain Management under Pharmacy Service Providers; Pharmacist (1835P1400X)	Pain Management under Pharmacy Service Providers; Pharmacist (1835P1400X)
Diagnosis Codes:		
Diagnosis #1	Z02.1	Z02.1
Procedure #1		
Accept Assignment	Y	Y
Charge Amount	700.00	550.00
Diagnosis Pointers ICD 10	1	1
Modifiers		
Multiplier	1	1
Procedure Code	80306	80306
Procedure Description	DRUG TEST PRSMV INSTRMNT	26724-FLOWER, ROSE :DRUG TEST PRSMV INSTRMNT
Service Date	07-22-2026	07-22-2026

Q << Prev Next>> Cancel

An **Original Source** Action Column button will provide an audit trail for accountability when unposted procedures are received from a charge interface. Since encounters may be modified prior to posting, you can now access a list of the procedure codes initially contained in each encounter along with the Source, Date and Time received and the User Code. **Note**: The **Original Source** Action Column button will only display if the procedures were a charge interface

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EDITING UNPOSTED INVOICE BILLING PROCEDURES

When procedures are stored in *Unposted Procedures* and you need to edit the information, you will need to perform the following steps to ensure the corrected data is pulled into the encounter prior to posting. There are two workflows available for editing the data. You can either start by accessing the *Unposted Procedures* function or you can start by accessing the patient's account in the *Change Patient Data* function. The following scenarios and steps provided are when you start by accessing the *Unposted Procedures* function.

If you need to change the Department linked to the Employer:

1. Change the Department linked to the Employer Code in the Employer Code Table.
2. Access the procedures already stored in *Unposted Procedures* for the patient.
3. Click the *patient account # link* to access *Change Patient Data.*
4. Terminate the Employer currently stored on the patient's account that was linked to the wrong Department Code, then add the Employer Code back to the patient's account.
5. Cancel out of the patient's account to return to *Unposted Procedures*.
6. Change the **Case** to **'0-Not Applicable'** (*the screen will automatically refresh*).
7. Select the Invoice Billing Case (*the screen will automatically refresh*).
8. Confirm the corrected data populated in the encounter.
9. Post the procedures.

If you need to change the Employer/Billing Group within the Case:

1. Access the procedures already stored in *Unposted Procedures* for the patient.
2. Click the *patient account # link* to access *Change Patient Data.*
3. Terminate the Employer currently stored on the patient's account then add the correct Employer to the patient's account.
4. Confirm the Case was automatically created for that Employer.
5. Terminate the Case for the old Employer on the patient's account.
6. Cancel out of the patient's account to return to *Unposted Procedures*.
7. Select the Invoice Billing Case (*the screen will automatically refresh*).
8. Confirm the corrected data populated in the encounter.
9. Post the procedures.

If you need to change the Charge Amounts by adding a Default Fee Schedule to the "C-" Department Code OR by adding a Fee Schedule to the Case:

1. Access the *Department Code Table* and add the **Default Fee Schedule** to the 'C-' Department Code.
2. Access the procedures already stored in *Unposted Procedures* for the patient
3. Click the *patient account # link* to access *Change Patient Data.*
4. Edit the Case and add the **Fee Schedule**. **Note**: When a **Default Fee Schedule** is added or changed in the Department Code Table, any existing Cases on patient accounts must be manually updated with the Fee Schedule.
5. Cancel out of the patient's account to return to *Unposted Procedures*.
6. Click the **Re-Calculate Chg Amts** Action Column button so the charge amounts are updated using the fee schedule amounts. Click **Save** to post the encounter.

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If you need to change the encounter from patient billing to invoice (client) billing:
If a message comes through the interface as patient/insurance billing, the Employer Code will not be automatically created by the interface, so you must create it prior to editing the encounter.

- Access the procedures already stored in *Unposted Procedures* for the patient.
- Click the *patient account # link* to access *Change Patient Data.*
- Click the **Employers** Action Column button.
  - Click the magnifying glass icon for the **Employer Code** field to access the Table Search window.
  - Click **Add item** – add the employer's information then **select the "C-" Department Code prior to clicking Save**.
  - When the new **Employer Code** displays in the Table Search window, select it.
  - Complete any additional fields applicable for the Employer and click **Save**.
  - Click **Cancel** to return to the *Patient Summary Screen*. Confirm the Case was automatically created for that Employer, then click **Cancel** to return to *Unposted Procedures*.
- Select the **Case** for the Employer. Confirm the **Department** and **Billing Group** fields updated with the invoice billing codes. Click **Save** to post the encounter.

If you need to change the encounter from invoice (client) billing to patient/insurance billing:

- Access the procedures already stored in *Unposted Procedures* for the patient.
- Remove the **Case**.
- Confirm the Department and Billing Group no longer display invoice billing codes. Click **Save** to post the encounter.

Note: An additional workflow you can use is to start by accessing the patient's account in the *Change Patient Data* function. After you have printed a list of the unposted procedures to Excel, you can then edit those accounts and post the encounter directly from the *Change Patient Data* function.

1. Access *Unposted Procedures* and click the **Filter** Action Column button. Insert the data you want to identify the encounters/patient accounts that you need to edit.
2. When the *Unposted Procedures* screen redisplays, click the **Print to Excel** Action Column button to print the spreadsheet.
3. Exit *Unposted Procedures* and access *Change Patient Data*.
4. Make the necessary changes and then click the ***Transactions*** Action Column button. Click the **Procedures** Action Column button to proceed with posting the encounter.

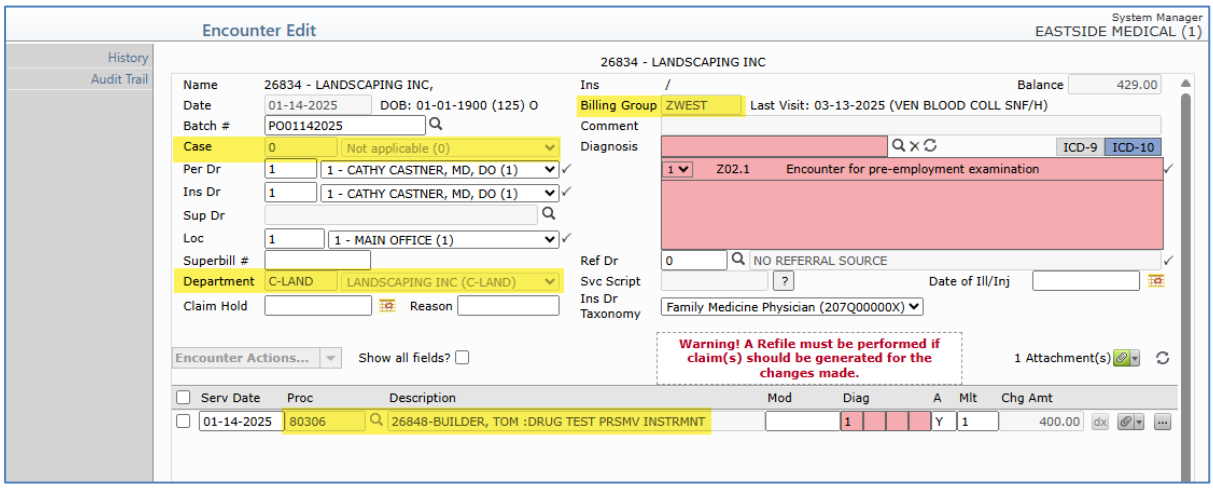
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EDITING POSTED INVOICE BILLING ENCOUNTERS

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, Procedure Code, Procedure Description or the Charge Amount, you will need to reverse the encounter on both accounts. The reasons for this are because:

- You are unable to edit any of the Case information on the invoice billing account, since the Case information is not stored on that account.
- The Procedure code and Description must be controlled by the process of posting to the patient's account and allowing the system to perform all the background steps to ensure everything is posted properly to both the invoice billing account and the patient's account.



At this time, the only way to correct the information is to reverse the encounters on both accounts, make the necessary corrections and then re-post the procedures to the patient's account using the *Procedure Entry* function. You cannot clone the bad encounter and then correct the data – you must re-enter the correct charges using the *Procedure Entry* function because 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-post 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.

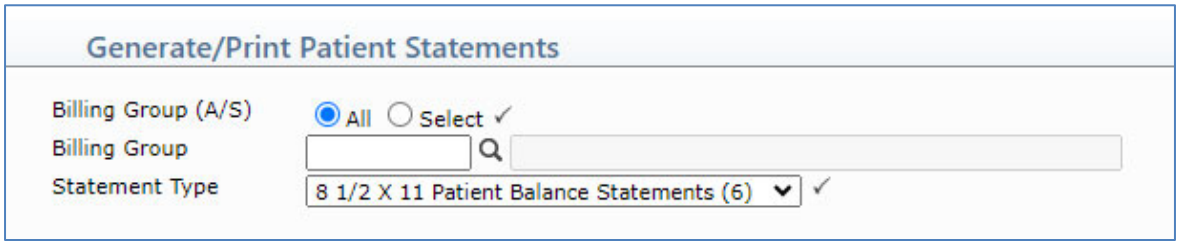
You will not be able to select any Invoice Billing Cases, Departments or Billing Groups for non-Invoice Billing encounters when editing encounters.

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PRINTING INVOICES AND STATEMENTS

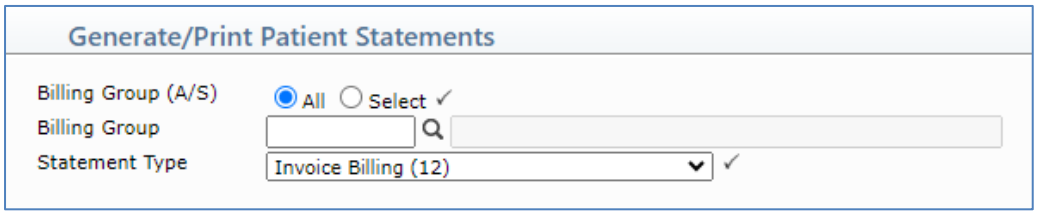
Statements for Non-Invoice Procedures

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

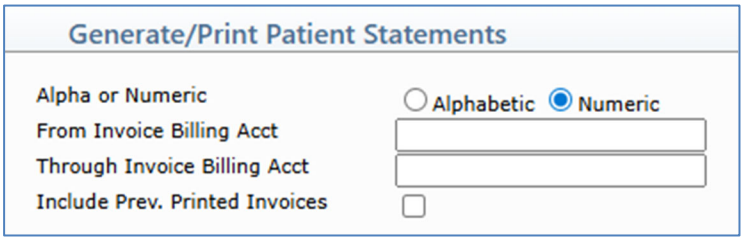


Invoices for Invoice Procedures

When you need to print invoices for invoice procedures, you should print for **All** Billing Groups for **Statement Type 12**. **Note**: Leave the **Billing Group** field blank to ensure all the invoices are generated properly.



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. If any invoices that were previously printed still have outstanding balances, you can select the **Include Prev. Printed Invoices** check box, so they will print again using the original invoice number. Any new procedures that have never been printed on an invoice will be printed on a new invoice with a new invoice number.



Note:

- If there are any unapplied payments or adjustments on the invoice billing account, they will not print on the invoices. You should process the *Open Credit Report* prior to printing invoices to ensure the correct account balances are printed on the invoices.

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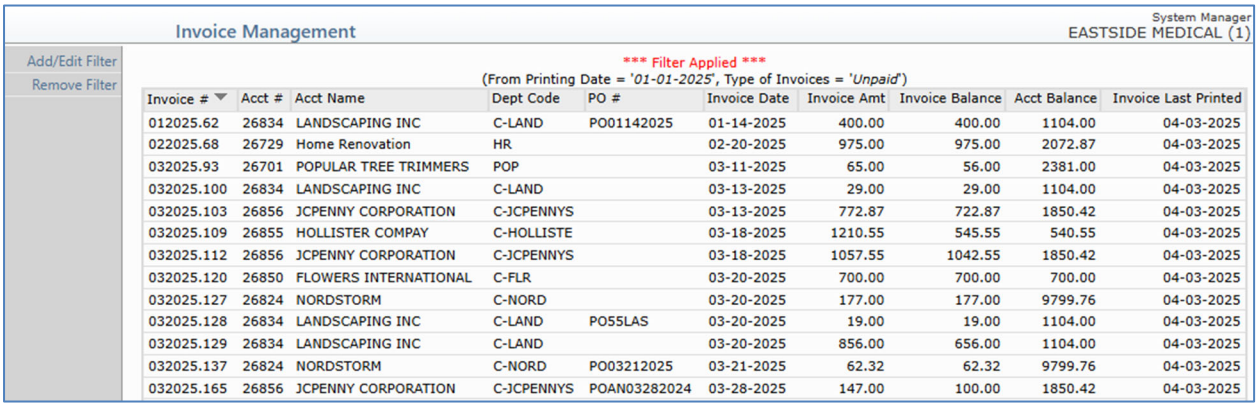
EDITING INVOICES

After an invoice has been printed and assigned an Invoice #, you are able to remove procedures from the invoice by reversing the charges from the invoice billing account (and the patient account) and reprinting 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, reprint invoices and post payments. When you first access the function, a Filter is auto-applied and will list all invoices printed for the past 90 days. The **Remove Filter** button won't remove the 90-day filter, but you can use the **Add/Edit Filter** function to change the date or remove it to see every outstanding invoice. The list displays:

- 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 Last Printed – Displays the last time an invoice was printed or reprinted from within this function or when you print using the *Generate/Print* function. Note: A date will only be added for any new invoices printed using the *Generate/Print* function after the v2025.2.0 update has been installed.



Invoice Management

System Manager
EASTSIDE MEDICAL (1)

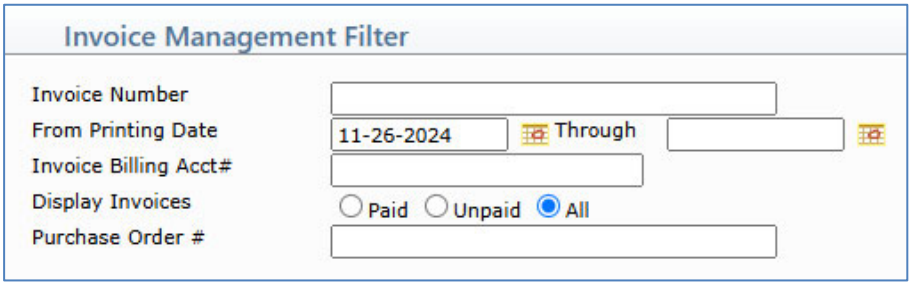
Add/Edit Filter
Remove Filter

*** Filter Applied ***
(From Printing Date = '*01-01-2025*', Type of Invoices = '*Unpaid*')

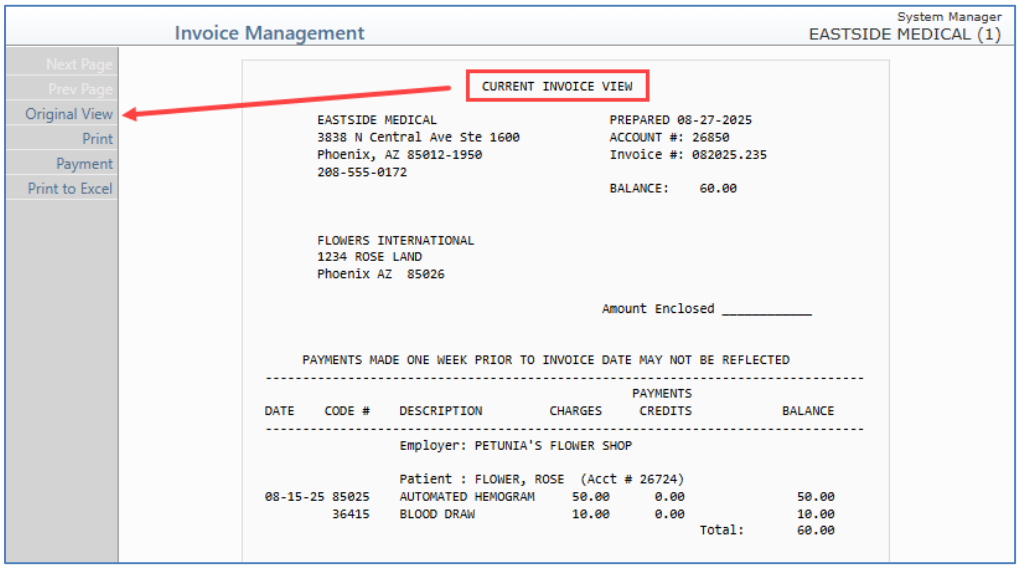
Invoice #	Acct #	Acct Name	Dept Code	PO #	Invoice Date	Invoice Amt	Invoice Balance	Acct Balance	Invoice Last Printed
012025.62	26834	LANDSCAPING INC	C-LAND	PO01142025	01-14-2025	400.00	400.00	1104.00	04-03-2025
022025.68	26729	Home Renovation	HR		02-20-2025	975.00	975.00	2072.87	04-03-2025
032025.93	26701	POPULAR TREE TRIMMERS	POP		03-11-2025	65.00	56.00	2381.00	04-03-2025
032025.100	26834	LANDSCAPING INC	C-LAND		03-13-2025	29.00	29.00	1104.00	04-03-2025
032025.103	26856	JCPENNY CORPORATION	C-JCPENNYS		03-13-2025	772.87	722.87	1850.42	04-03-2025
032025.109	26855	HOLLISTER COMPAY	C-HOLLISTE		03-18-2025	1210.55	545.55	540.55	04-03-2025
032025.112	26856	JCPENNY CORPORATION	C-JCPENNYS		03-18-2025	1057.55	1042.55	1850.42	04-03-2025
032025.120	26850	FLOWERS INTERNATIONAL	C-FLR		03-20-2025	700.00	700.00	700.00	04-03-2025
032025.127	26824	NORDSTORM	C-NORD		03-20-2025	177.00	177.00	9799.76	04-03-2025
032025.128	26834	LANDSCAPING INC	C-LAND	PO55LAS	03-20-2025	19.00	19.00	1104.00	04-03-2025
032025.129	26834	LANDSCAPING INC	C-LAND		03-20-2025	856.00	656.00	1104.00	04-03-2025
032025.137	26824	NORDSTORM	C-NORD	PO03212025	03-21-2025	62.32	62.32	9799.76	04-03-2025
032025.165	26856	JCPENNY CORPORATION	C-JCPENNYS	POAN03282024	03-28-2025	147.00	100.00	1850.42	04-03-2025

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



You can view an individual invoice by clicking anywhere in the row for the invoice. After you have selected an invoice from the list, the invoice will display the current amount owing. The Action Columns buttons provide a toggle button to switch back and forth between the **Current View** and **Original View**.



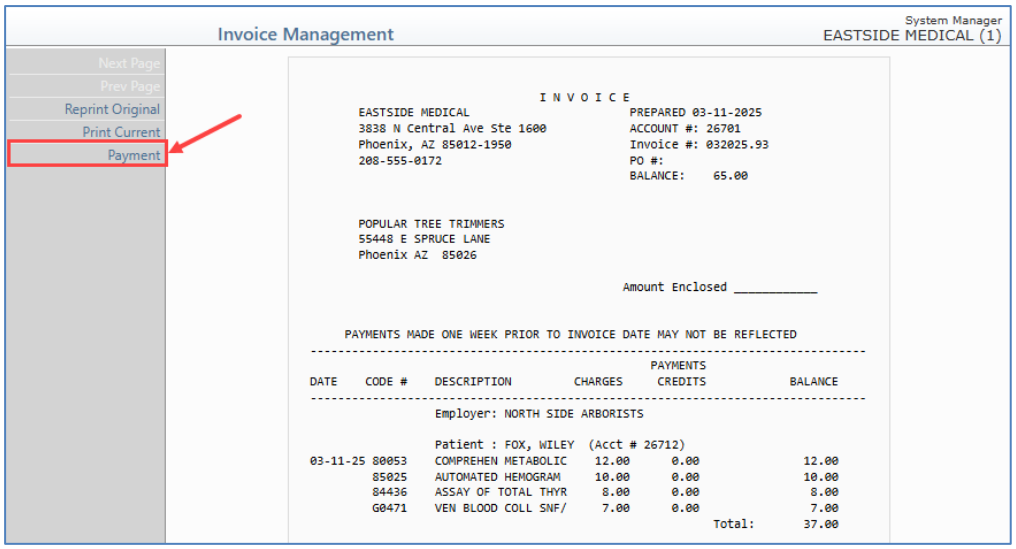
If there are multiple pages for the invoice, you can use the **Next Page** and **Prev Page** Action Column buttons to navigate through them. When you are done viewing the invoice, click **Cancel** to return to the main Invoice Management screen.

You can use the **Print** Action Column button to print the invoice currently displayed on your screen. You can also use the **Print to Excel** Action Column button to print the invoice to Excel. The 'current view' of the invoice will be printed, regardless of the view currently displayed on the screen. All transactions for the Invoice will print on a single sheet in Excel (*even if the invoice displays on multiple pages*). **Note**: The Excel invoice will not include Payments/Credits, Balance Aging amounts, or Statement comments. You will need to manually apply any text or column formatting you prefer to use. See the *Invoice Samples* section of this document to view a sample Excel invoice.

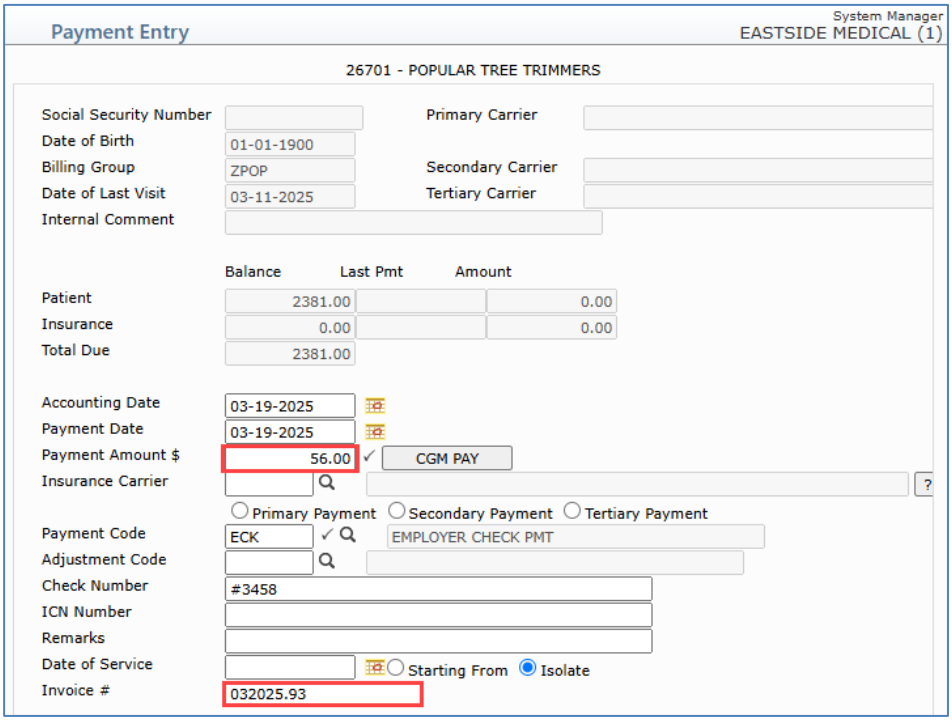
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Posting a Payment

You can post a payment to the account directly from within the *Invoice Management* function. After you have selected an invoice from the list, the **Payment** Action Column button appears, which will take you to *Payment Entry* for the account associated with the invoice.



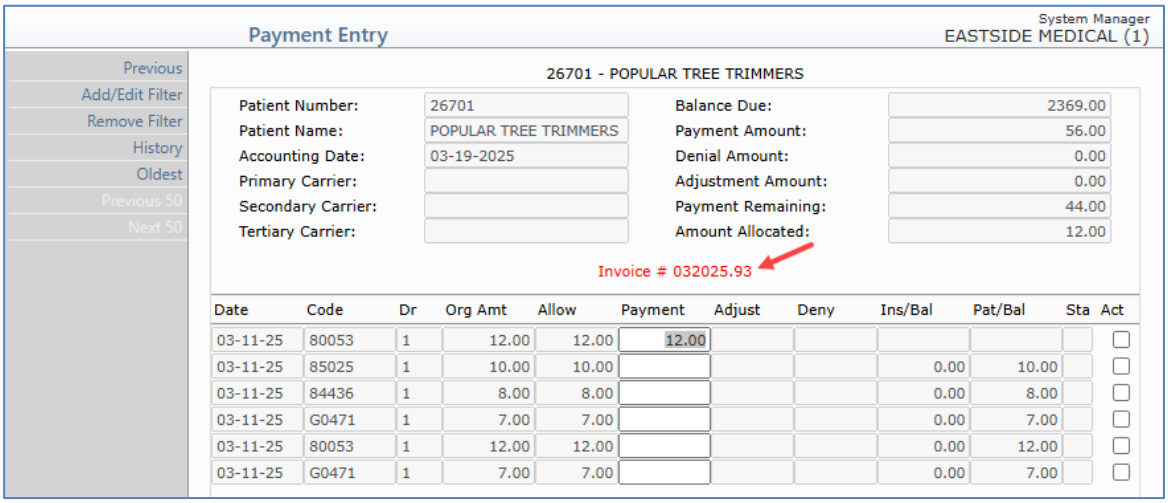
After you enter the **Batch Number** (if applicable) and click **Save**, the *Payment Entry* screen will display. The current balance for the invoice automatically populates the **Payment Amount** field and the **Invoice #** field contains the invoice number for the invoice you were viewing.



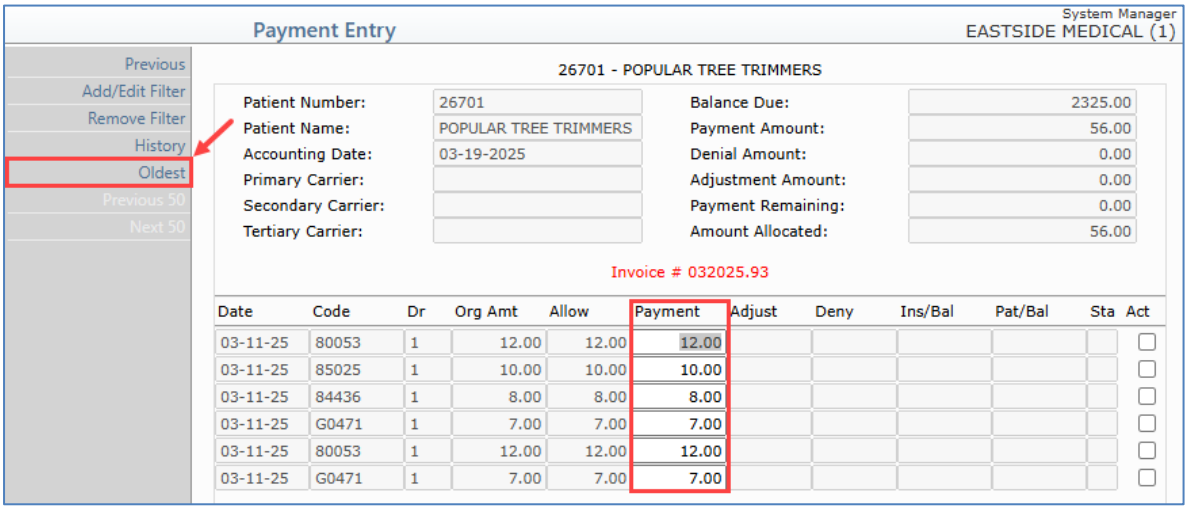
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After you complete the necessary payment fields, click **Save** to proceed to the *Payment Allocation* screen, where only the open items for the **Invoice #** entered will be displayed, along with the **Invoice #**.

Note: If you access *Payment Entry* directly from the *Transactions* menu, you can enter the invoice number you want to pay in the **Invoice #** field and the *Payment Allocation* screen will only display the open items for the **Invoice #** entered, along with the **Invoice #**.



You can click the **Oldest** Action Column button to automatically allocate the payment to the open items.

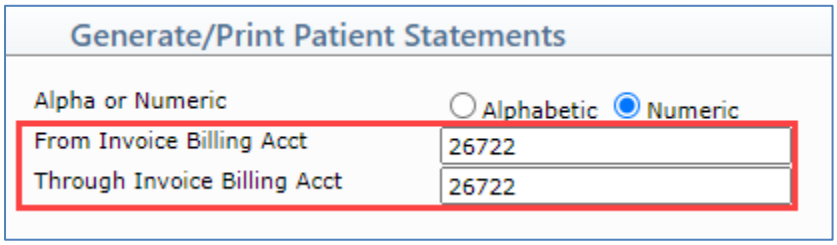


After you have posted the payment, you will be returned to the main *Invoice Management* screen.

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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.



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INVOICE SAMPLES

Single-Layer Invoice Billing

```
                                I N V O I C E

       EASTSIDE MEDICAL                          PREPARED February 15, 2024
       3838 N Central Ave Ste 1600               ACCOUNT #: 5555555
       Phoenix, AZ 85012-1950                    Invoice #: 041524.##
       208-555-0172                              PO#:
                                                 BALANCE:    732.00


       Construction Specialists
       4444 Caspar St
       Phoenix AZ  85036-1045
                                                 Amount Enclosed _____________

     PAYMENTS MADE ONE WEEK PRIOR TO STATEMENT DATE MAY NOT BE REFLECTED
-------------------------------------------------------------------------------
                                                  PAYMENTS
DATE      CODE #   DESCRIPTION          CHARGES    CREDITS              BALANCE
-------------------------------------------------------------------------------
                   Employer: Construction Specialists
                   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


TOTALS                                                                   732.00
-------------------------------------------------------------------------------
   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
```

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Two-Layer Invoice Billing

```
                                I N V O I C E

       EASTSIDE MEDICAL                        PREPARED February 15, 2024
       3838 N Central Ave Ste 1600             ACCOUNT #: 5555555
       Phoenix, AZ 85012-1950                  Invoice #: 041524.##
       208-555-0172                            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
-------------------------------------------------------------------------------
                                                 PAYMENTS
DATE      CODE #   DESCRIPTION          CHARGES   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                                                 732.00
-------------------------------------------------------------------------------
        PLEASE REMIT PAYMENT IMMEDIATELY.
        For Billing Questions call 602-277-6277.

-------------------------------------------------------------------------------
                                          PLEASE PAY BALANCE ->        732.00
```

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Two-Layer Invoice Billing with Patient Totals

```
                                I N V O I C E

       EASTSIDE MEDICAL                          PREPARED Mar 19, 2025
       3838 N Central Ave Ste 1600               ACCOUNT #: 26701
       Phoenix, AZ 85012-1950                    Invoice #: 032025.93
       208-555-0172                              PO#:
                                                 BALANCE:    56.00


       POPULAR TREE TRIMMERS
       55448 E SPRUCE LANE
       Phoenix AZ  85026
                                                 Amount Enclosed _____________


     PAYMENTS MADE ONE WEEK PRIOR TO INVOICE DATE MAY NOT BE REFLECTED
-------------------------------------------------------------------------------
                                                  PAYMENTS
DATE     CODE #   DESCRIPTION          CHARGES    CREDITS              BALANCE
-------------------------------------------------------------------------------
                  Employer: NORTH SIDE ARBORISTS

                  Patient : FOX, WILEY  (Acct # 26712)
03-11-25 80053    COMPREHEN METABOLIC    12.00      0.00                12.00
         85025    AUTOMATED HEMOGRAM     10.00      0.00                10.00
         84436    ASSAY OF TOTAL THYR     8.00      0.00                 8.00
         G0471    VEN BLOOD COLL SNF/     7.00      0.00                 7.00
                                                            Total:    37.00

                  Employer: WEST SIDE ARBORISTS

                  Patient : FOX, JAMIE  (Acct # 26718)
         80053    COMPREHEN METABOLIC    12.00      0.00                12.00
         G0471    VEN BLOOD COLL SNF/     7.00      0.00                 7.00
                                                            Total:    19.00


TOTALS                                                                  56.00
-------------------------------------------------------------------------------
   AGING:      Current |  30 Day |  60 Day |  90 Day | 120 Day |    T O T A L
-------------------------------------------------------------------------------
                 56.00                                                  56.00
-------------------------------------------------------------------------------
        Please contact us with any questions about your balance.
        For Billing Questions: (602) 277-6277


-------------------------------------------------------------------------------
                                  PLEASE PAY INVOICE BALANCE ->       56.00
```

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Two-Layer Invoice Billing with Patient Totals and Special Fees

```
                                I N V O I C E

       EASTSIDE MEDICAL                        PREPARED Apr 14, 2025
       3838 N Central Ave Ste 1600             ACCOUNT #: 26834
       Phoenix, AZ 85012-1950                  Invoice #: 042025.197
       208-555-0172
                                               BALANCE:   111.00


       LANDSCAPING INC
       12345 W EVERGREEN WAY
       Phoenix AZ  85021
                                               Amount Enclosed _____________


     PAYMENTS MADE ONE WEEK PRIOR TO INVOICE DATE MAY NOT BE REFLECTED
-------------------------------------------------------------------------------
                                                 PAYMENTS
DATES    CODE #   DESCRIPTION          CHARGES   CREDITS              BALANCE
-------------------------------------------------------------------------------
                  Employer: EASTERN LANDSCAPING
                  Patient : BUILDER, FRED  (Acct # 26871)
04-14-25 80053    COMPREHEN METABOLIC    12.00      0.00               12.00
         85025    AUTOMATED HEMOGRAM     10.00      0.00               10.00
                                                          Total:   22.00

                  Employer: WESTERN LANDSCAPING
                  Patient : BUILDER, ROSIE  (Acct # 26872)
04-14-25 80053    COMPREHEN METABOLIC    12.00      0.00               12.00
         G0471    VEN BLOOD COLL SNF/     7.00      0.00                7.00
                                                          Total:   19.00

                                                 Patient Subtotal:   41.00

04-14-25 STAT     26872-BUILDER, ROSI    25.00      0.00               25.00
                  STAT FEE
04-14-25 SPECPU   26871-BUILDER, FRED    20.00      0.00               20.00
                  SPECIMEN PICK-UP
04-14-25 STAT     26871-BUILDER, FRED    25.00      0.00               25.00
                  STAT FEE

                                        Special Fees Subtotal:   70.00

TOTALS                                                                111.00
-------------------------------------------------------------------------------
   AGING:      Current | 30 Day |  60 Day |  90 Day |  120 Day |    T O T A L
-------------------------------------------------------------------------------
                111.00      0.00      0.00      0.00      0.00        111.00
-------------------------------------------------------------------------------
        YOUR ACCOUNT IS PAST DUE.  PLEASE REMIT
        PAYMENT IMMEDIATELY.
        Please contact us with any questions about your balance!
        Thank you for choosing our practice for your health needs.
        We now have Saturday hours available, please call for appt.

-------------------------------------------------------------------------------
                                  PLEASE PAY INVOICE BALANCE ->      111.00
```

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Excel Sample - Two-Layer Invoice Billing with Patient Totals and Special Fees

	A	B	C	D	E	F	G	H
1				**INVOICE**				
2	EASTSIDE MEDICAL					Prepared:	8/11/2025	
3	3838 N Central Ave Ste 1600					Account #:	26850	
4	Phoenix, AZ 85012-1950					Invoice #:	072025.230	
5	208-555-0172					PO#:	PO20250731MGR	
6								
7	FLOWERS INTERNATIONAL							
8	1234 ROSE LAND							
9	Phoenix AZ 85026							
10				**Employer:**	PETUNIA'S FLOWER SHOP			
11	**Pt/Employee**	**Date of Service**	**Collected At**	**Superbill #**	**Procedure**	**Description**	**Charge**	
12	FLOWER, ROSE (Acct # 26724)	7/31/2025	MAIN OFFICE		80053	COMPREHEN METABOLIC	$ 25.00	
13	FLOWER, ROSE (Acct # 26724)	7/31/2025	MAIN OFFICE		85025	AUTOMATED HEMOGRAM	$ 10.00	
14	FLOWER, ROSE (Acct # 26724)	7/31/2025	MAIN OFFICE		80061	LIPID PANEL BLOOD TEST	$ 162.50	
15	FLOWER, ROSE (Acct # 26724)	7/31/2025	MAIN OFFICE		83036	GLYCATED HEMOGLOBIN	$ 31.46	
16	FLOWER, ROSE (Acct # 26724)	7/31/2025	MAIN OFFICE		80202	ASSAY OF VANCOMYCIN	$ 20.00	
17	FLOWER, ROSE (Acct # 26724)	7/31/2025	MAIN OFFICE		G0471	VEN BLOOD COLL SNF/H	$ 5.00	
18						**Total:**	$ 253.96	
19				**Employer:**	RUBY'S FLOWERS			
20	FLOWER, FREESIA (Acct # 26726)	7/31/2025	MAIN OFFICE		80053	COMPREHEN METABOLIC	$ 15.00	
21	FLOWER, FREESIA (Acct # 26726)	7/31/2025	MAIN OFFICE		85025	AUTOMATED HEMOGRAM	$ 9.00	
22	FLOWER, FREESIA (Acct # 26726)	7/31/2025	MAIN OFFICE		80061	LIPID PANEL BLOOD TEST	$ 162.50	
23	FLOWER, FREESIA (Acct # 26726)	7/31/2025	MAIN OFFICE		85651	RBC SED RATE NONAUT	$ 10.00	
24	FLOWER, FREESIA (Acct # 26726)	7/31/2025	MAIN OFFICE		83036	GLYCATED HEMOGLOBIN	$ 31.46	
25						Total:	$ 227.96	
26	FLOWER, PANSY (Acct # 26727)	7/31/2025	MAIN OFFICE		80164	ASSAY DIPROPYLACETI	$ 15.00	
27	FLOWER, PANSY (Acct # 26727)	7/31/2025	MAIN OFFICE		85025	AUTOMATED HEMOGRAM	$ 9.00	
28						**Total:**	$ 24.00	
29								
30						**Patient Subtotal:**	$ 505.92	
31								
32	FLOWER, PANSY (Acct # 26727)	7/31/2025	MAIN OFFICE		STAT	STAT FEE	$ 25.00	
33	FLOWER, FREESIA (Acct # 26726)	7/31/2025	MAIN OFFICE		STAT	STAT FEE	$ 25.00	
34	FLOWER, ROSE (Acct # 26724)	7/31/2025	MAIN OFFICE		STAT	STAT FEE	$ 25.00	
35						**Special Fees Subtotal:**	$ 75.00	
36								
37						**Total:**	$ 580.92	
38								

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