



CompuGroup™
Medical

Invoice Billing Information

August 30, 2024

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.

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 fields should already be completed after the database has been activated. Only the **Responsible Doctor** and **Referral Source** fields can be changed if needed, the other fields are controlled by the system.

Invoice Billing Integration	
Default Values:	
Birth Date	<input type="text" value="01-01-1900"/>
Sex	<input type="text" value="Other (0)"/> ▼
Rel to Guarantor	<input type="text" value="Self (0)"/> ▼
Default Diagnosis	<input type="text" value="0"/> <input type="text" value="NO DIAGNOSIS RECORDED"/>
Responsible Doctor	<input type="text" value="1"/> <input type="text" value="CATHY CASTNER, MD, DO (1)"/> ▼ ✓
Referral Source	<input type="text" value="0"/> ✓ <input type="text" value="NO REFERRAL SOURCE"/>

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*) and confirm the **Use for Invoice Billing** check box is selected. These codes 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	XYZ ✓
	Description	XYZ CONSTRUCTION
	Address Line One	12568 N MAIN ST
	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 #	26698

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 - XYZ - XYZ CONSTRUCTION		CompuGroup Medical US EASTSIDE MEDICAL (1)
Employer Code ▼	Employer Name	
ABC	ABC ELECTRICAL	
ACME	ACME PAVING COMPANY	
CDE	CDE ROOFING	
MMM	MMM PLUMBING	

Create Employer Codes

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

Maintain Employer Codes

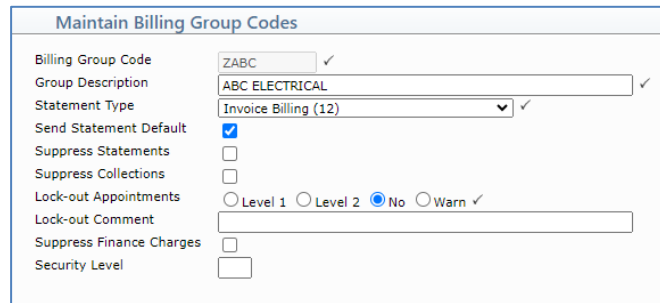
Employer Code	<input type="text" value="ABC"/> ✓
Employer Name	<input type="text" value="ABC ELECTRICAL"/> ✓
Address Line One	<input type="text" value="5487 W LIGHTNING WAY"/>
Address Line Two	<input type="text"/>
Zip Code	<input type="text" value="85026"/>
City	<input type="text" value="Phoenix"/>
State	<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="XYZ"/> <input type="text" value="XYZ CONSTRUCTION (XYZ)"/> ▼
Use for Invoice Billing	<input checked="" type="checkbox"/>
Invoice Billing Account #	<input type="text" value="26698"/>

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, 'ZABC'. The 'Z' Billing Group Codes will automatically have the custom **Statement Type (12) – Invoice Billing** set.

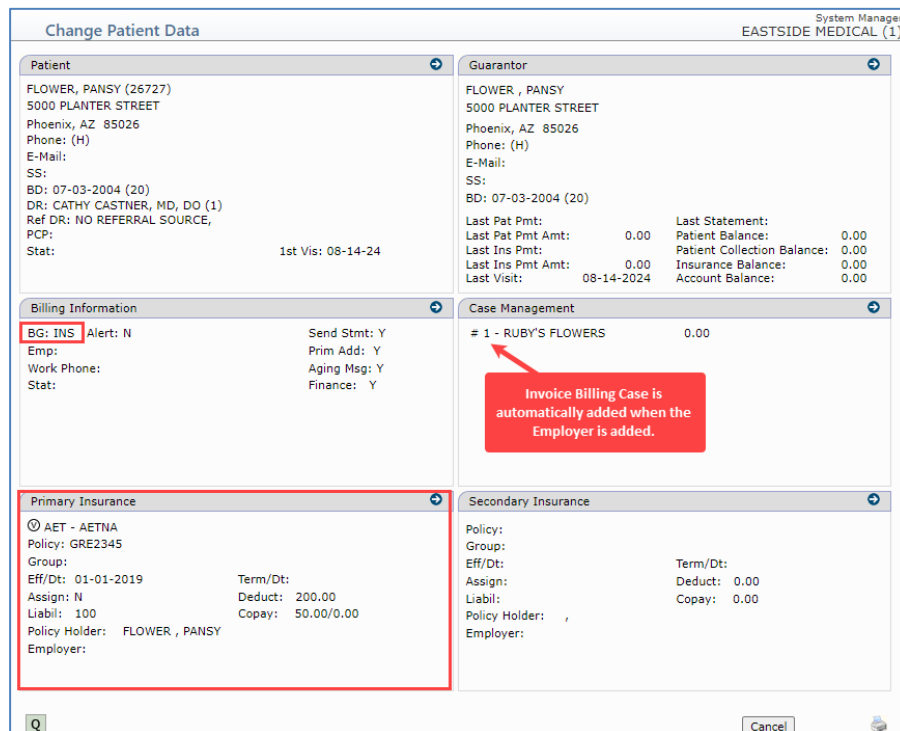


Maintain Billing Group Codes	
Billing Group Code	ZABC ✓
Group Description	ABC ELECTRICAL ✓
Statement Type	Invoice Billing (12) ✓
Send Statement Default	<input checked="" type="checkbox"/>
Suppress Statements	<input type="checkbox"/>
Suppress Collections	<input type="checkbox"/>
Lock-out Appointments	<input type="radio"/> Level 1 <input type="radio"/> Level 2 <input checked="" type="radio"/> No <input type="radio"/> Warn ✓
Lock-out Comment	
Suppress Finance Charges	<input type="checkbox"/>
Security Level	<input type="checkbox"/>

PATIENT ACCOUNTS

When you register a patient account, you should:

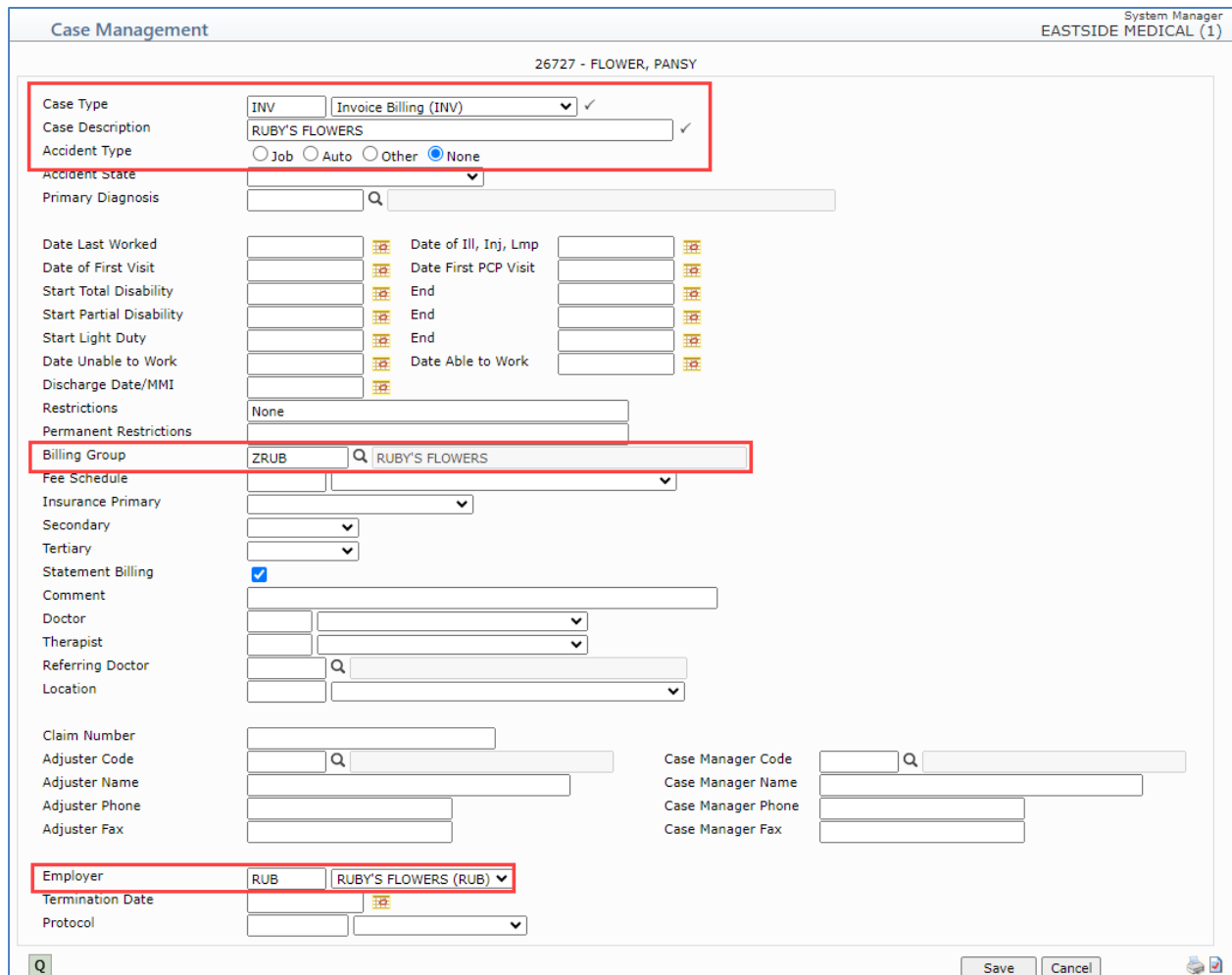
- Enter the Billing Group – If the patient account will be used for both invoice and non-invoice procedures enter the main Billing Group (Ex: INS) on the *Billing Information* screen. If the account will only be used for invoice procedures, enter the Billing Group of your choice.
- Enter the patient's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



Change Patient Data		System Manager EASTSIDE MEDICAL (1)	
Patient FLOWER, PANSY (26727) 5000 PLANTER STREET Phoenix, AZ 85026 Phone: (H) E-Mail: SS: BD: 07-03-2004 (20) DR: CATHY CASTNER, MD, DO (1) Ref DR: NO REFERRAL SOURCE, PCP: Stat: 1st Vis: 08-14-24		Guarantor FLOWER, PANSY 5000 PLANTER STREET Phoenix, AZ 85026 Phone: (H) E-Mail: SS: BD: 07-03-2004 (20) Last Pat Pmt: 0.00 Last Pat Pmt Amt: 0.00 Last Ins Pmt: 0.00 Last Ins Pmt Amt: 0.00 Last Visit: 08-14-2024 Last Statement: 0.00 Patient Balance: 0.00 Patient Collection Balance: 0.00 Insurance Balance: 0.00 Account Balance: 0.00	
Billing Information BG: INS Alert: N Emp: Work Phone: Stat: Send Stmt: Y Prim Add: Y Aging Msg: Y Finance: Y		Case Management # 1 - RUBY'S FLOWERS 0.00 <div style="border: 1px solid red; padding: 5px; color: white; text-align: center;"> Invoice Billing Case is automatically added when the Employer is added. </div>	
Primary Insurance <input checked="" type="radio"/> AET - AETNA Policy: GRE2345 Group: Eff/Dt: 01-01-2019 Term/Dt: Assign: N Deduct: 200.00 Liabil: 100 Copay: 50.00/0.00 Policy Holder: FLOWER, PANSY Employer:		Secondary Insurance Policy: Group: Eff/Dt: Assign: Liabil: Policy Holder: Employer: Term/Dt: Deduct: 0.00 Copay: 0.00	

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.



Case Management System Manager
EASTSIDE MEDICAL (1)

26727 - FLOWER, PANSY

Case Type: INV Invoice Billing (INV) ✓

Case Description: RUBY'S FLOWERS ✓

Accident Type: Job Auto Other None

Accident State: [Dropdown]

Primary Diagnosis: [Searchable Input]

Date Last Worked: [Date Picker] Date of Ill, Inj, Lmp: [Date Picker]

Date of First Visit: [Date Picker] Date First PCP Visit: [Date Picker]

Start Total Disability: [Date Picker] End: [Date Picker]

Start Partial Disability: [Date Picker] End: [Date Picker]

Start Light Duty: [Date Picker] End: [Date Picker]

Date Unable to Work: [Date Picker] Date Able to Work: [Date Picker]

Discharge Date/MMI: [Date Picker]

Restrictions: None

Permanent Restrictions: [Text Input]

Billing Group: ZRUB RUBY'S FLOWERS

Fee Schedule: [Dropdown]

Insurance Primary: [Dropdown]

Secondary: [Dropdown]

Tertiary: [Dropdown]

Statement Billing:

Comment: [Text Input]

Doctor: [Dropdown]

Therapist: [Dropdown]

Referring Doctor: [Searchable Input]

Location: [Dropdown]

Claim Number: [Text Input]

Adjuster Code: [Searchable Input]

Adjuster Name: [Text Input]

Adjuster Phone: [Text Input]

Adjuster Fax: [Text Input]

Case Manager Code: [Searchable Input]

Case Manager Name: [Text Input]

Case Manager Phone: [Text Input]

Case Manager Fax: [Text Input]

Employer: RUB RUBY'S FLOWERS (RUB)

Termination Date: [Date Picker]

Protocol: [Dropdown]

[Save] [Cancel]

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, 'ZXYZ' - 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

Patient	Guarantor
FLOWERS INTERNATIONAL (26722) 1234 ROSE LANE Phoenix, AZ 85026 Phone: (H) E-Mail: SS: BD: 01-01-1900 (124) DR: CATHY CASTNER, MD, DO (1) Ref DR: REEDER, STEVEN PCP: Stat: 1st Vis: 08-13-24	FLOWERS INTERNATIONAL , 1234 ROSE LANE Phoenix, AZ 85026 Phone: (H) E-Mail: SS: BD: 01-01-1900 (124) Last Pat Pmt: Last Statement: 08-15-2024 Last Pat Pmt Amt: 0.00 Patient Balance: 4900.00 Last Ins Pmt: Patient Collection Balance: 0.00 Last Ins Pmt Amt: 0.00 Insurance Balance: 0.00 Last Visit: 08-14-2024 Account Balance: 4900.00
Billing Information	Case Management
BG: ZFLR Alert: N Send Stmt: N Emp: Prim Add: N Work Phone: Aging Msg: N Stat: Finance: N	
Primary Insurance	Secondary Insurance
Policy: Group: Eff/Dt: Term/Dt: Assign: Deduct: 0.00 Liabil: Copay: 0.00 Policy Holder: Employer:	Policy: Group: Eff/Dt: Term/Dt: Assign: Deduct: 0.00 Liabil: Copay: 0.00 Policy Holder: , Employer:

tasks
inbox (8)
calculator
calendar
rolldex
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 Q

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)			
New Patients (1)	There are (1) Un-registered New Patients with (1) charges waiting to be posted.														
<input type="checkbox"/> Sta <input type="checkbox"/> Source Account Patient Name Procedure Description Superbill Dept P Dr I Dr Loc DOS CPT Amt ICD-10	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Procedure Entry	26727	FLOWER, PANSY <small>Case: 1 - RUBY'S FLOWERS</small>	DRUG SCREEN CLASS LIST C		FLR	1	1	1	08-21-24	80301	300.00	0
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Procedure Entry	26726	FLOWER, FREESIA <small>Case: 1 - RUBY'S FLOWERS</small>	DRUG SCREEN CLASS LIST B		FLR	1	1	1	08-21-24	80301	900.00	0	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Procedure Entry	26718	FOX, JAMIE <small>Case: 1 - WEST SIDE ARBORISTS</small>	DRUG SCREEN CLASS LIST B		POP	1	1	2	08-21-24	80301	900.00	0	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Procedure Entry	26712	FOX, WILEY <small>Case: 1 - NORTH SIDE ARBORISTS</small>	DRUG SCREEN CLASS LIST A		POP	1	1	1	08-21-24	80301	775.00	0	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	E-Superbill	26707	COYOTE, WILEY R <small>Case: 1 - ACME PAVING COMPANY</small>	DRUG SCREEN CLASS LIST A	10821.7	XVZ	1	1	1	08-21-24	80301	775.00	0	

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		
Print	DIXON, ROBIN	4365	02-05-	F	1	OFF	LDQ	1		

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 and Department 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 Department linked to the Employer Code and then proceed with posting.

Procedure Entry Function EASTSIDE MEDICAL (1)

Name: 26727 - FLOWER, PANSY Ins: AET N / Balance: 0.00
 Date: 08-21-2024 DOB: 07-03-2004 (20) F Billing Group: ZRUB INS Last Visit: 08-14-2024 (Employer Responsible)

Batch #: PO20240821 Case: 1 Department: FLR

Per Dr: 1 - CATHY CASTNER, MD, DO (1) ✓
 Ins Dr: 1 - CATHY CASTNER, MD, DO (1) ✓
 Loc: 1 - MAIN OFFICE (1) ✓
 Department: FLR - FLOWERS INTERNATIONAL (FLR)

#	Serv Date	Proc	Description	Mod	Diag	A	Mlt	Chg Amt
1	08-21-2024	80301	DRUG SCREEN CLASS LIST C		1		Y 1	300.00
2								
3								
4								
5								
6								
7								
8								
9								
10								
11								
12								
13								
14								
15								
16								
17								

Page Size: 20 Previous: 1 Next Total Entries: 100 Total: 300.00

When the procedures are posted to the patient’s account, a copy of the procedures are 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.

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.

Transaction History System Manager
EASTSIDE MEDICAL (1)

Patient: 26727 - FLOWER, PANSY
 5000 PLANTER STREET
 Phoenix, AZ 85026
 (H)

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

Encounter 12228 - 08/21/2024

Case 1 - RUBY'S FLOWERS
 Billing Group ZRUB
 Status Open

ICD-9 Diagnosis Code(s): 0 - NO DIAGNOSIS RECORDED
 ICD-10 Diagnosis Code(s): 0 - NO DIAGNOSIS RECORDED

Idaho Patient Act

Service Date	Code	Description	\$ Charge	\$ Ins Bal	\$ Pat Bal	\$ Tot Bal	Ins Img
08/21/2024	INV	80301-DRUG SCREEN CLASS LIST C	\$0.00	\$0.00	\$0.00	\$0.00	

Last Saved 08/21/2024 06:24PM by MGR
 Totals: \$0.00 \$0.00 \$0.00 \$0.00

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

Transaction History for 26727 - FLOWER, PANSY

Accounting Date 08-21-2024 Service Date 08-21-2024
 Procedure Code INV - Employer Responsible ICD-9: 0
 Procedure Amount 0.00 (1@0.00) ICD-10: 0
 Per Dr/Ins Dr 1 - CATHY CASTNER, MD, DO/1 Encounter ICD-9 0
 Ins Dr Taxonomy Internal Medicine Physician (207R00000X) DX's
 Location 1 - MAIN OFFICE Encounter ICD-10 0
 Department FLR - FLOWERS INTERNATIONAL (26722) DX's
 Ref Dr
 Alt. Desc. 80301-DRUG SCREEN CLASS LIST C Sup#: Ins:
 Batch: PO20240821 Asgn: Y
 Amount Remaining \$ 0.00
 Claim Hold Date:
 Case 1 - RUBY'S FLOWERS Claim Hold Reason:

Acct Date	Date	Code	Description	Dr	Lc	Diagnosis	Amount	Applied	1 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.

Transaction History
System Manager
EASTSIDE MEDICAL (1)

Patient: 26722 - FLOWERS INTERNATIONAL
 1234 ROSE LANE
 Phoenix, AZ 85026
 (H)

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

Encounter 12227 - 08/21/2024

Case 0 - Not applicable Status Open
 Billing Group ZRUB

ICD-9 Diagnosis Code(s): 0 - NO DIAGNOSIS RECORDED
 ICD-10 Diagnosis Code(s): 0 - NO DIAGNOSIS RECORDED

Idaho Patient Act:

Service Date	Code	Description	\$ Charge	\$ Ins Bal	\$ Pat Bal	\$ Tot Bal	Ins Img
08/21/2024	80301	26727-FLOWER, PANSY :DRUG SCREEN CLASS LIST C	\$300.00	\$0.00	\$300.00	\$300.00	
Totals:			\$300.00	\$0.00	\$300.00	\$300.00	

Last Saved 08/21/2024 06:24PM by MGR

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

Transaction History for 26722 - FLOWERS INTERNATIONAL

Accounting Date	08-21-2024	Service Date	08-21-2024
Procedure Code	80301 - DRUG SCREEN CLASS LI	ICD-9:	0
Procedure Amount	300.00 (1@300.00)	ICD-10:	0
Per Dr/Ins Dr	1 - CATHY CASTNER, MD, DO/1	Encounter ICD-9	0
Ins Dr Taxonomy	Internal Medicine Physician (207R00000X)	DX's	
Location	1 - MAIN OFFICE	Encounter ICD-10	0
Department	FLR - FLOWERS INTERNATIONAL (26722)	DX's	
Ref Dr		Sup#:	Ins:
Alt. Desc.	26727-FLOWER, PANSY :DRUG SCREEN CLASS LIST C	Batch: PO20240821	Asgn: Y
		Amount Remaining	\$ 300.00
		Claim Hold Date:	
		Claim Hold Reason:	

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

Date	Time	Carrier	Action	User	Amount

Close

EDITING 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.

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)	<input checked="" type="radio"/> All <input type="radio"/> Select ✓
Billing Group	<input type="text"/> <input type="text"/> Q <input type="text"/>
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)	<input checked="" type="radio"/> All <input type="radio"/> Select ✓
Billing Group	<input type="text"/> <input type="text"/> Q <input type="text"/>
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	<input type="radio"/> Alphabetic <input checked="" type="radio"/> Numeric
From Invoice Billing Acct	<input type="text"/>
Through Invoice Billing Acct	<input type="text"/>

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.

RE-PRINTING INVOICES

If you need to re-print an invoice, you will 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

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 SAMPLES

Single-Layer Invoice Billing

I N V O I C E					
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
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



Two-Layer Invoice Billing

I N V O I C E

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					732.00

PLEASE REMIT PAYMENT IMMEDIATELY. For Billing Questions call 602-277-6277.						

PLEASE PAY BALANCE ->					732.00	