Invoice Billing Information

July 22, 2025

CGM webPRACTICE

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Table of Contents

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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 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 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, the code will be discarded in CGM webPRACTICE. If you need to switch the message to 'Client Bill', you need to delete it in *Unposted Procedures*, fix the message in the lab system and have it re-sent correctly.
- No Billing Group Codes should be created that start with 'Z'. These are strictly used for Department/Employer Billing Groups.
  - Must use Alpha codes when creating Billing Group codes to ensure sorting capabilities on reports.
- Must create Batches for PO #'s when posting transactions, if applicable.
- Interface – Must send the **Bill Type** to ensure the transactions are processed properly.
  - C or Client = Client/Invoice Billing
  - P or Patient = Patient Billing
  - All other types are treated as Insurance/Third-Party Billing

SYSTEM SETUP

After the Invoice Billing functionality has been activated in the system 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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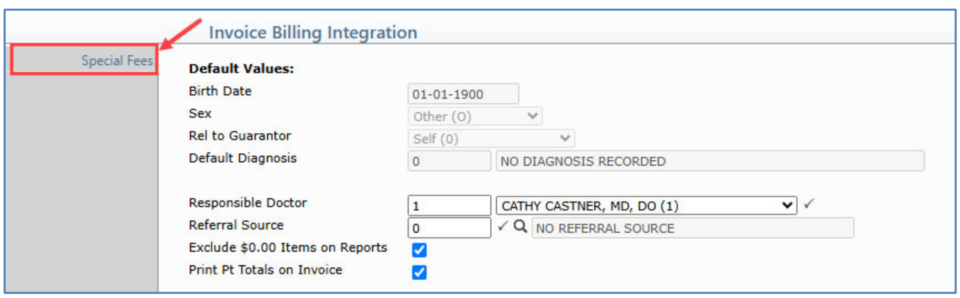
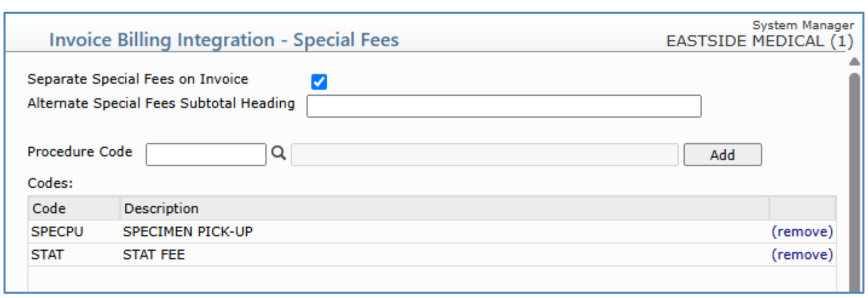
Invoice Billing Integration

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.

- 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.
- 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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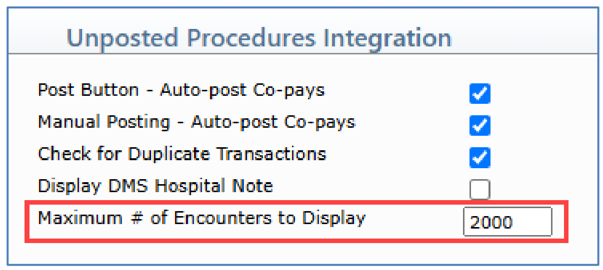
Unposted Procedures Integration

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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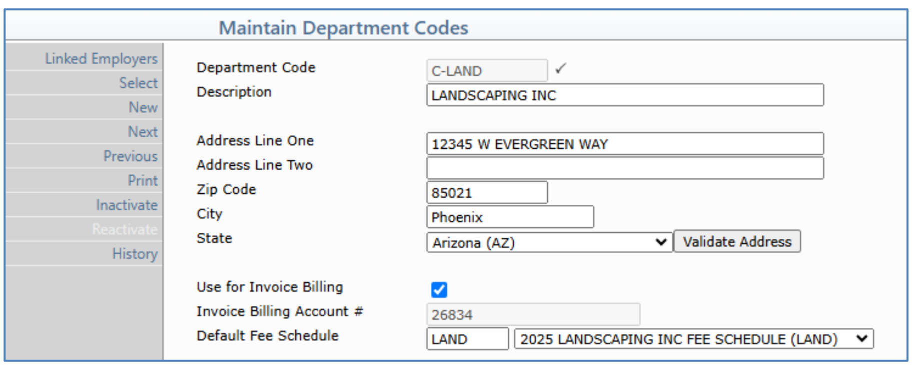
Create Department Codes

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.


Linked Employers - C-LAND - LANDSCAPING INC

Employer Code	Employer Name
EAST	EASTERN LANDSCAPING
WEST	WESTERN LANDSCAPING

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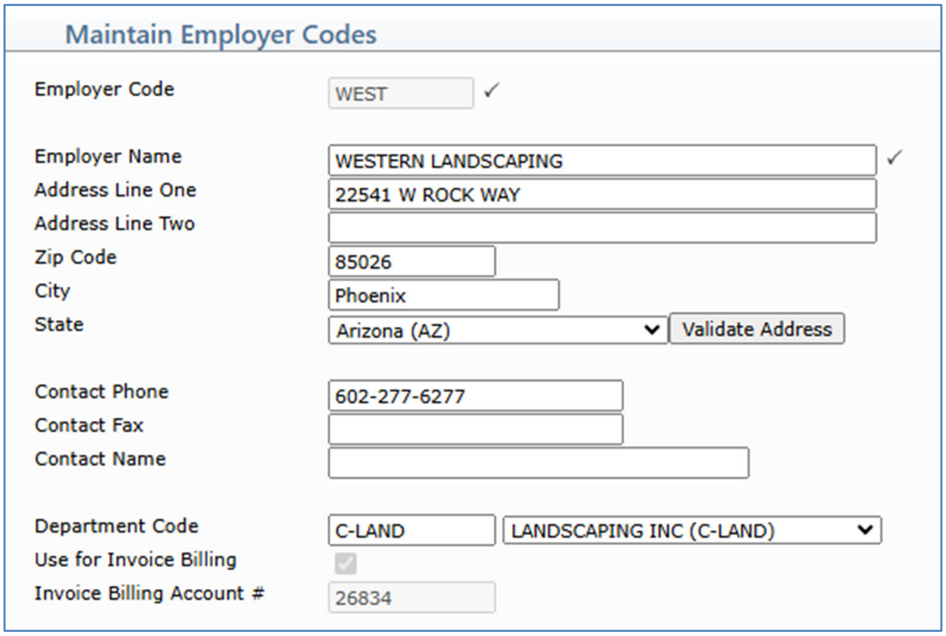
Create Employer Codes

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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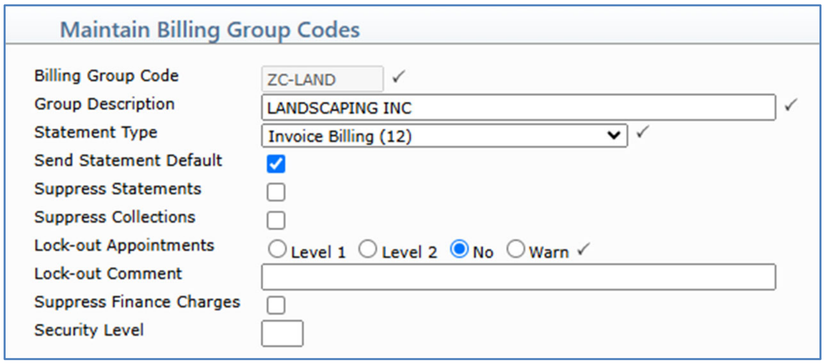
BILLING GROUP CODES

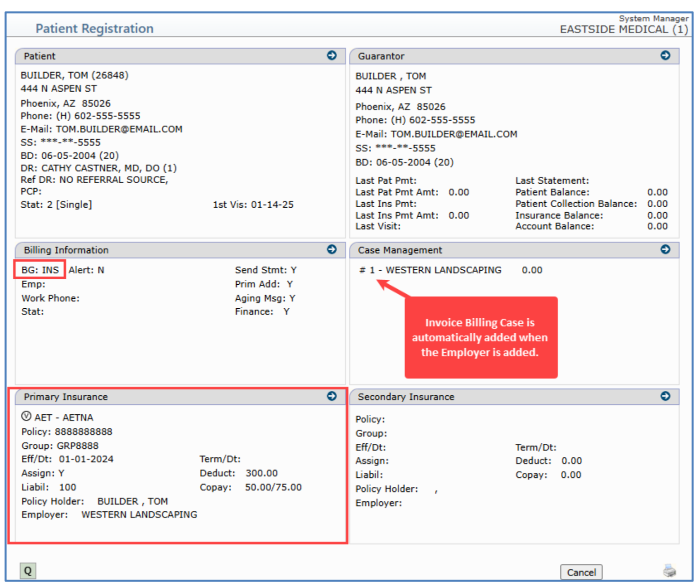
When Department Codes and Employer Codes are created, a matching Billing Group Code starting with Z followed by the Department/Employer code will be automatically created in the background. Billing Groups created for Department Codes will start with ‘ZC-‘ (for example, ‘ZC-LAND’) and be stored on the 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.



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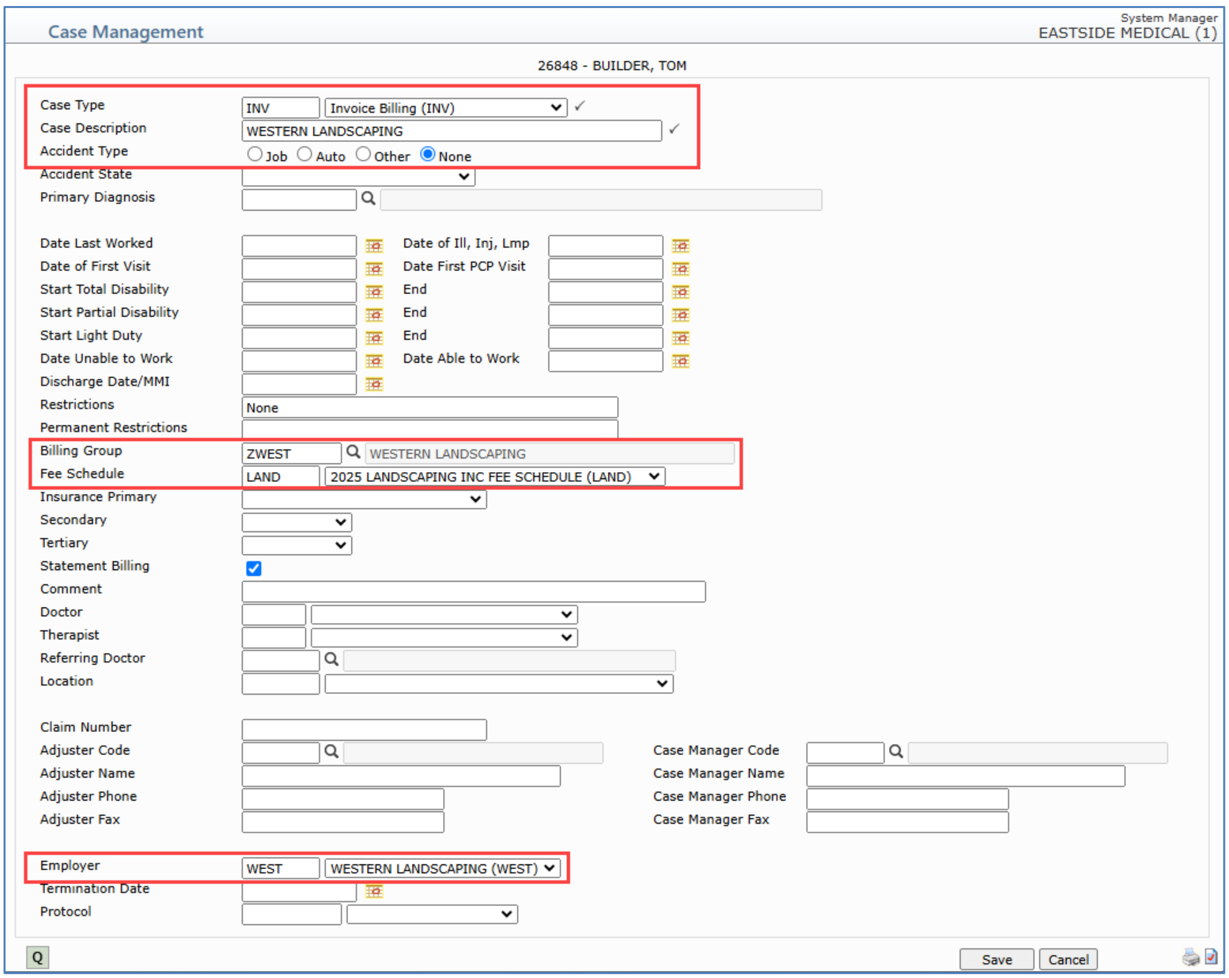
The Invoice Billing Case will be automatically created for the Employer, after the patient has been registered. The following fields will be set:

- **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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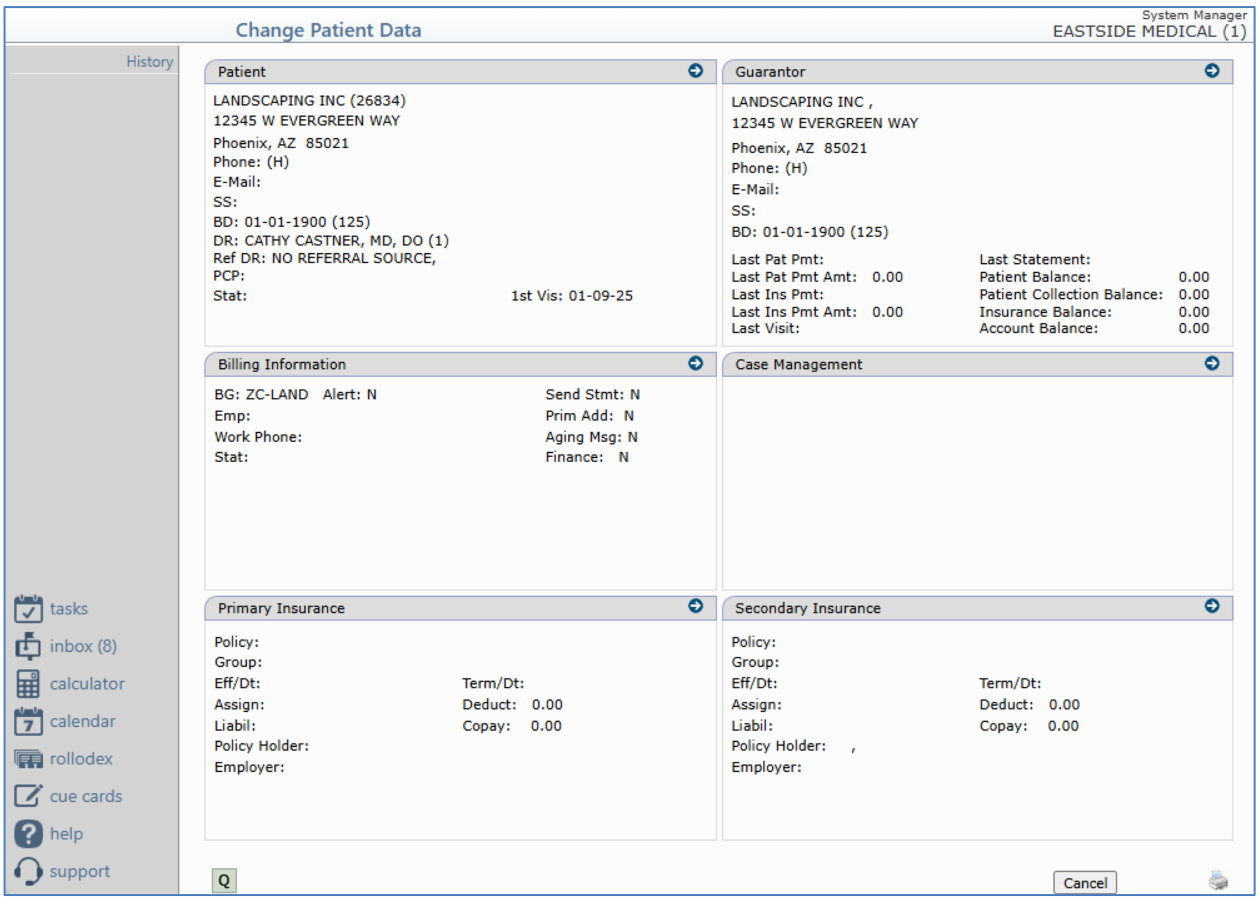
INVOICE BILLING ACCOUNTS

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

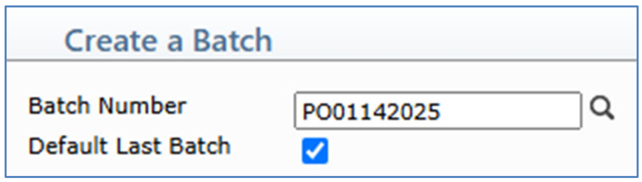
- They contain all the procedures that will be included on the invoice.
- You cannot post procedures directly to an Invoice Billing account.
- They will not contain any Case information and you will be prevented from entering any.
- The Action Column buttons have been removed with the exception of **History**.
- 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.



POSTING PROCEDURES FOR INVOICE BILLING

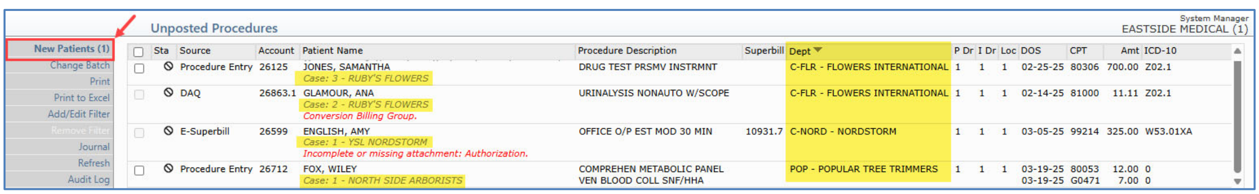
Using Purchase Orders (PO's)

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'.

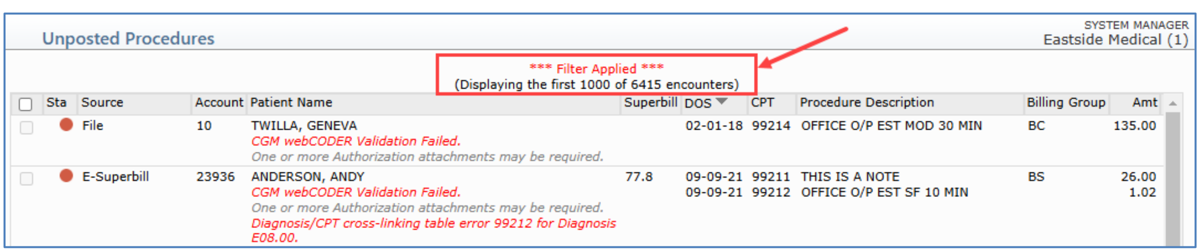


Unposted Procedures

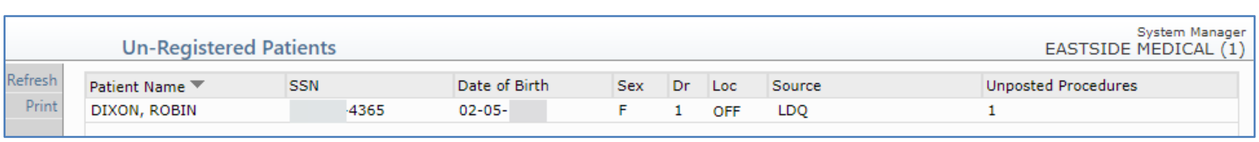
If the data is received via an interface, the first step to posting procedures would be to access *Unposted Procedures* and follow the normal process to select patients and post the procedures.



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



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

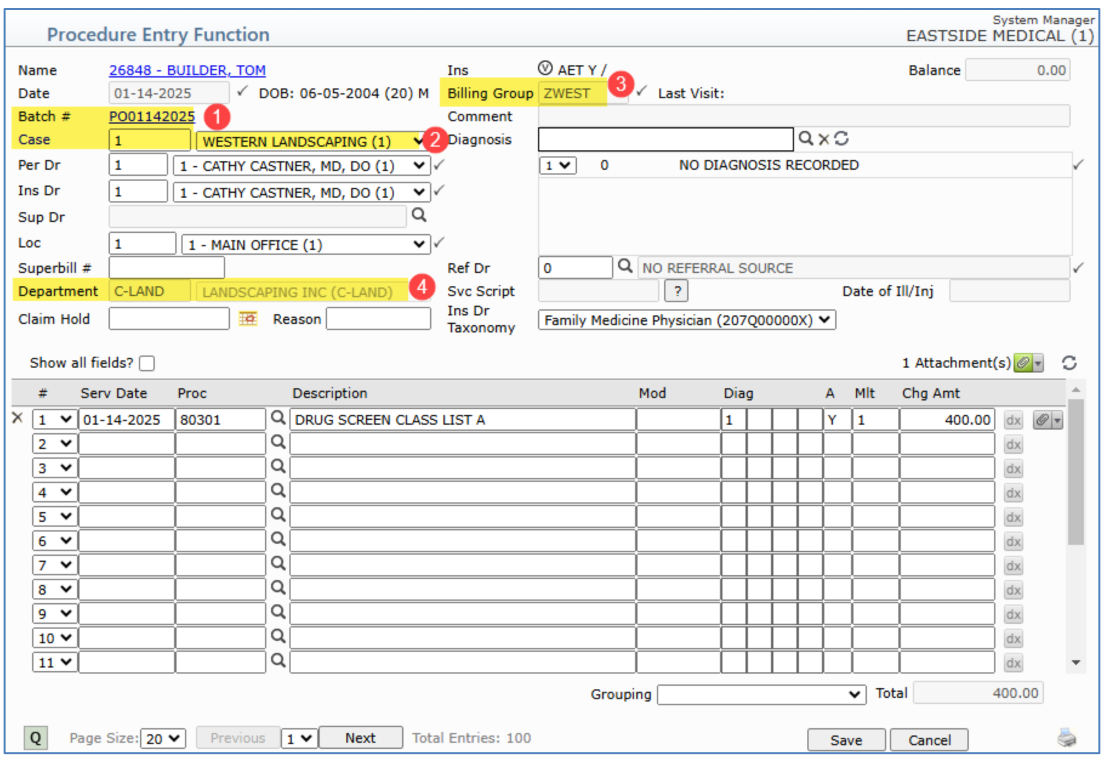


Procedure Entry

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

   Note: See the *Editing Unposted Invoice Billing Procedures* section for additional information when making edits.



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.

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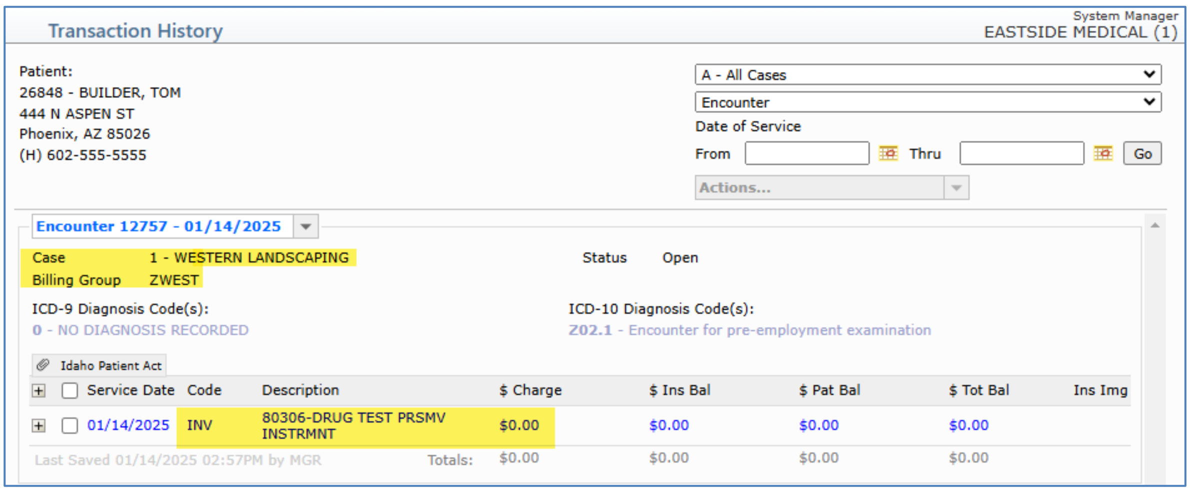
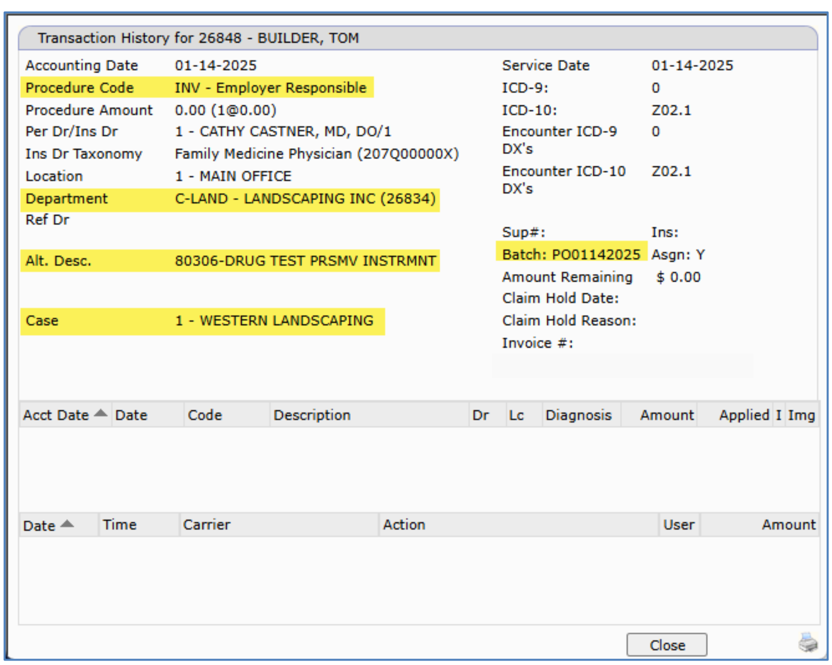
PATIENT ACCOUNT TRANSACTION HISTORY

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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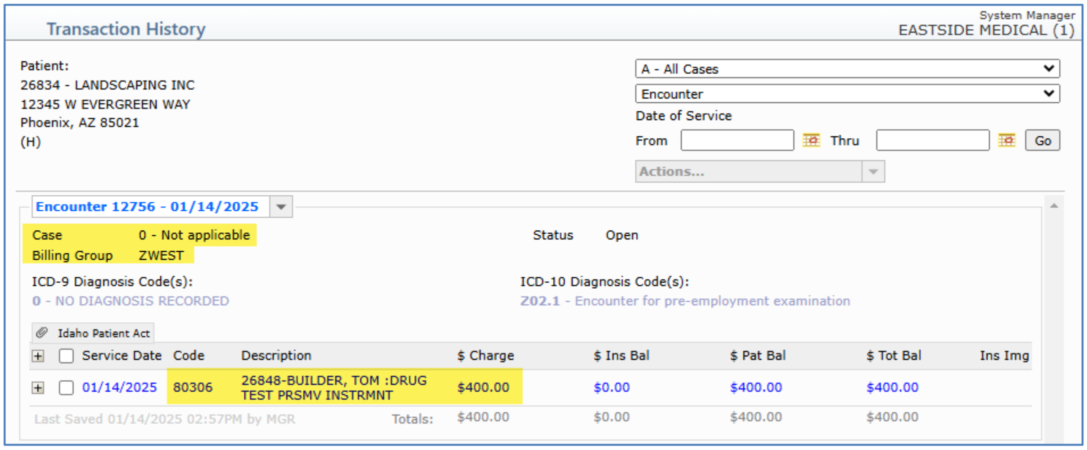
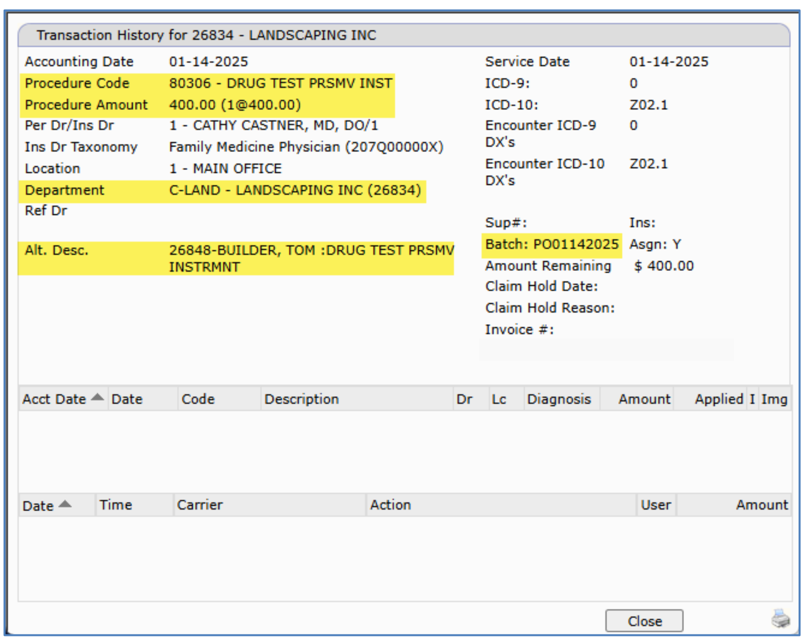
INVOICE BILLING ACCOUNT TRANSACTION HISTORY

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.



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 add a Fee Schedule to 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. Edit the Case and add the **Fee Schedule**.
4. Cancel out of the patient's account to return to *Unposted Procedures*.
5. On a new procedure line, enter the same procedure code(s) listed in the screen to have the alternate fee populate.
6. Delete the incorrect procedure code(s) by clicking the 'X' to the left of the procedure line.
7. Post the procedures.

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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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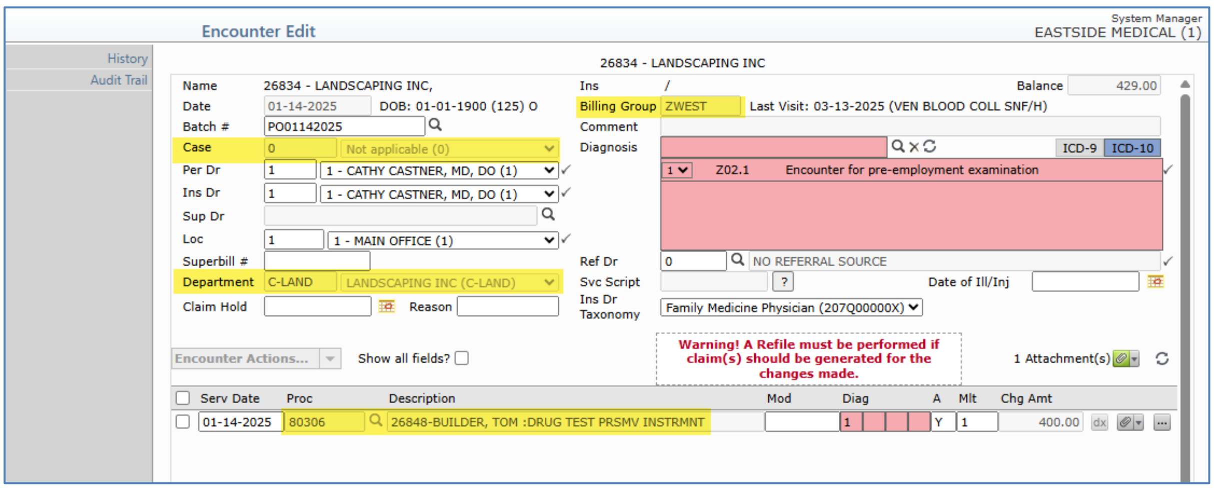
EDITING POSTED INVOICE BILLING ENCOUNTERS

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, or Procedure Description, 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. 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 <u>non-Invoice Billing</u> 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 <u>non-Invoice Billing</u> encounters when editing encounters.

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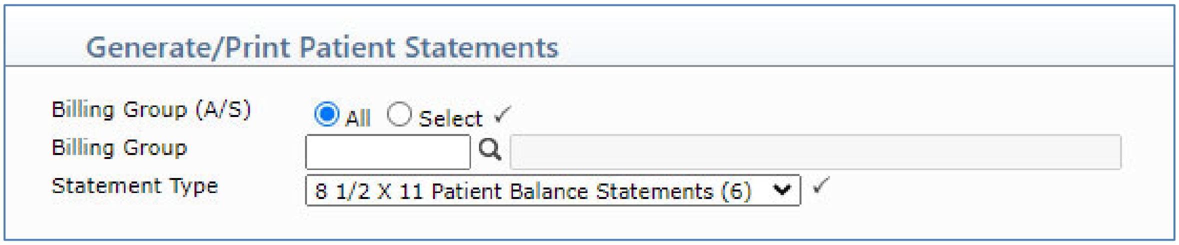
PRINTING INVOICES AND STATEMENTS

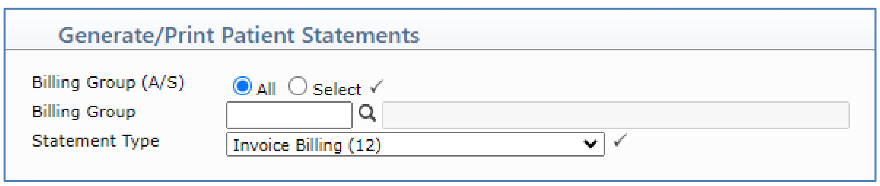
Statements for Non-Invoice Procedures

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

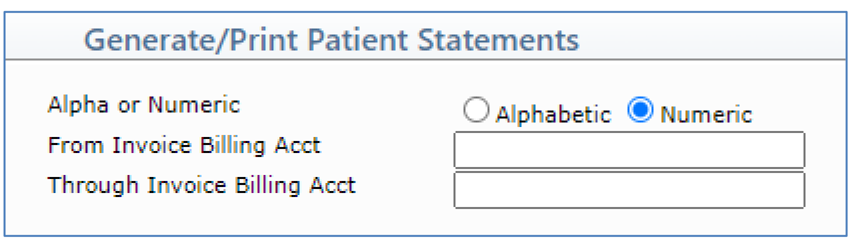


Invoices for Invoice Procedures

When you need to print invoices for invoice procedures, you would 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.



Notes:

- 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 been printed on an invoice will be printed on a new invoice with a new invoice number.
- 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, 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 list of all invoices printed for the past 90 days will be displayed including:

- Invoice #
- Invoice Billing Acct #
- Account Name
- Dept Code – The code associated with the Invoice Billing account
- Purchase Order # (PO) - If one was included on the Invoice
- Invoice Date - The date the invoice was first printed
- Invoice Amount - The total amount owing when the invoice was first printed
- Invoice Balance - The current amount owing for the invoice
- Acct Balance - The total balance currently owing on the invoice billing account
- Invoice 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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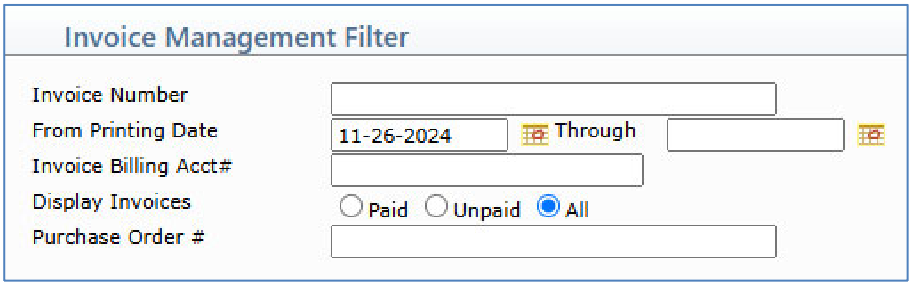
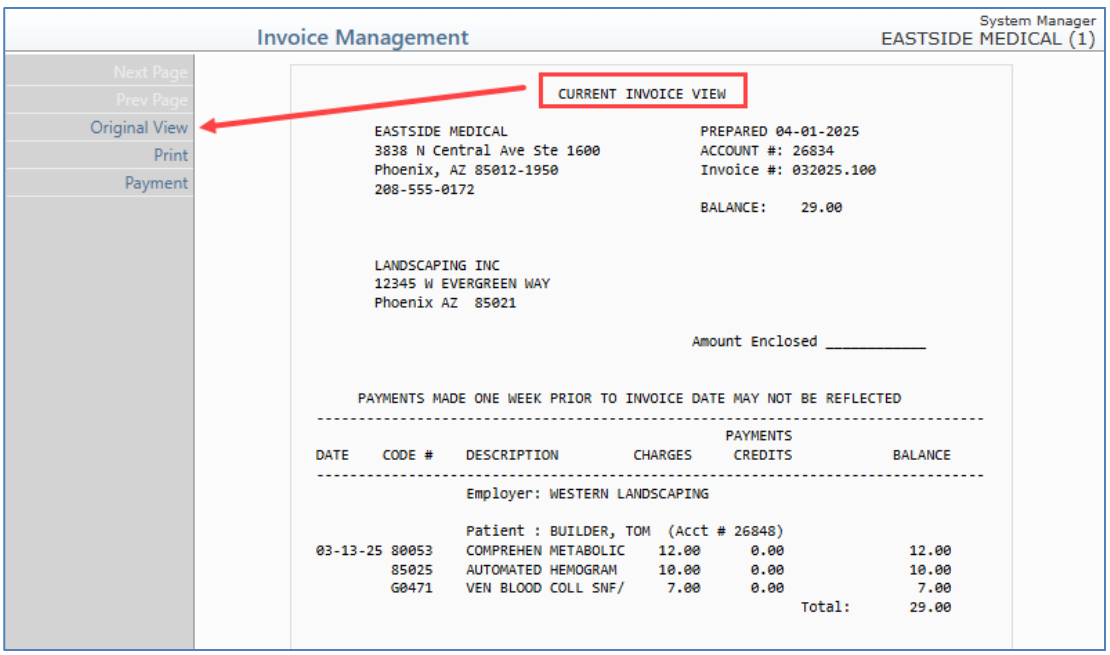
You can filter the results on the screen by using the **Add/Edit Filter** Action Column button.



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**. You can use the **Print** Action Column button to print the invoice currently displayed on your screen.



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.

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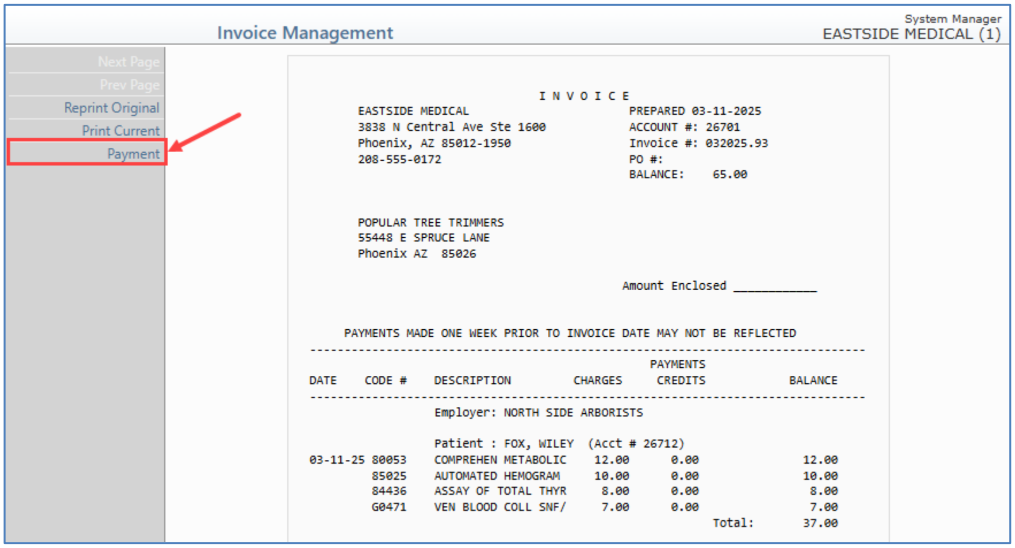
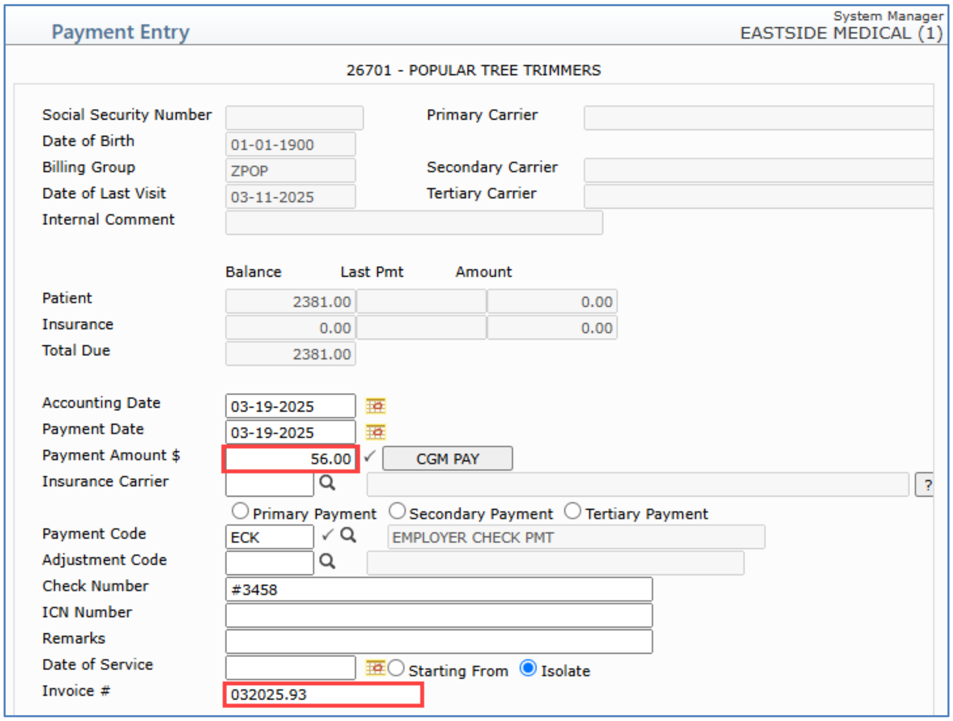
Posting a Payment

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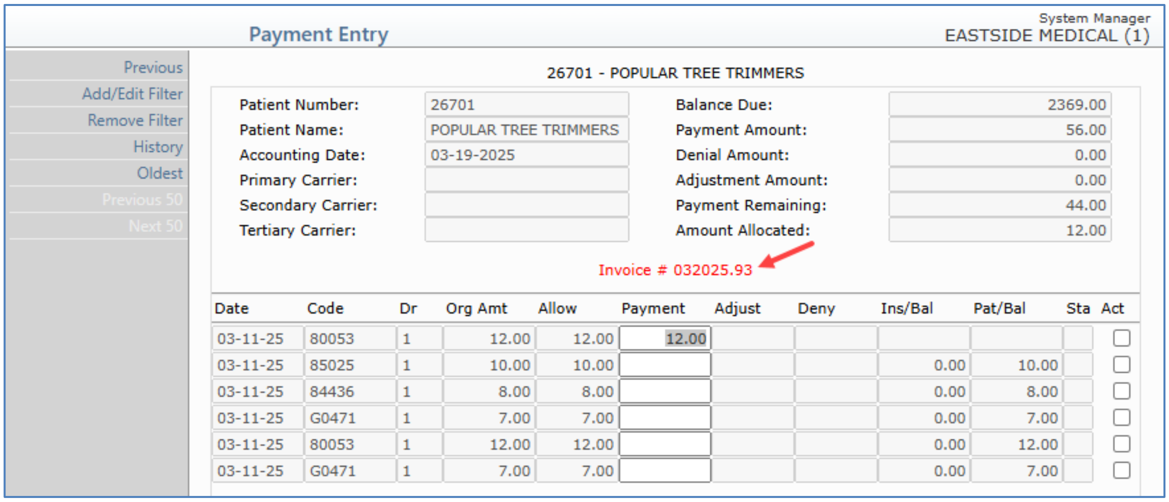
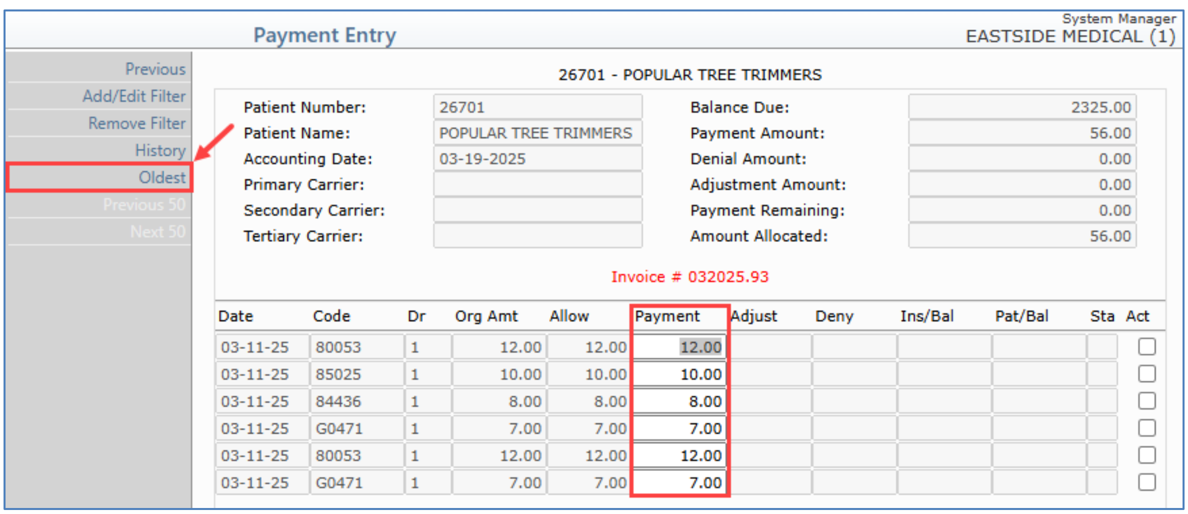
After you complete the necessary payment fields, click **Save** to proceed to the *Payment Allocation* screen, where only the open items for the **Invoice #** entered will be displayed, along with the **Invoice #**.

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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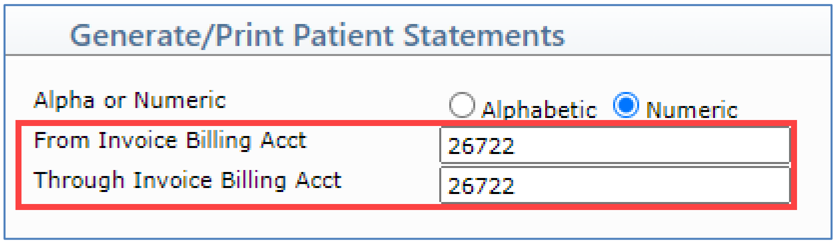
RE-PRINTING INVOICES

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
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

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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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