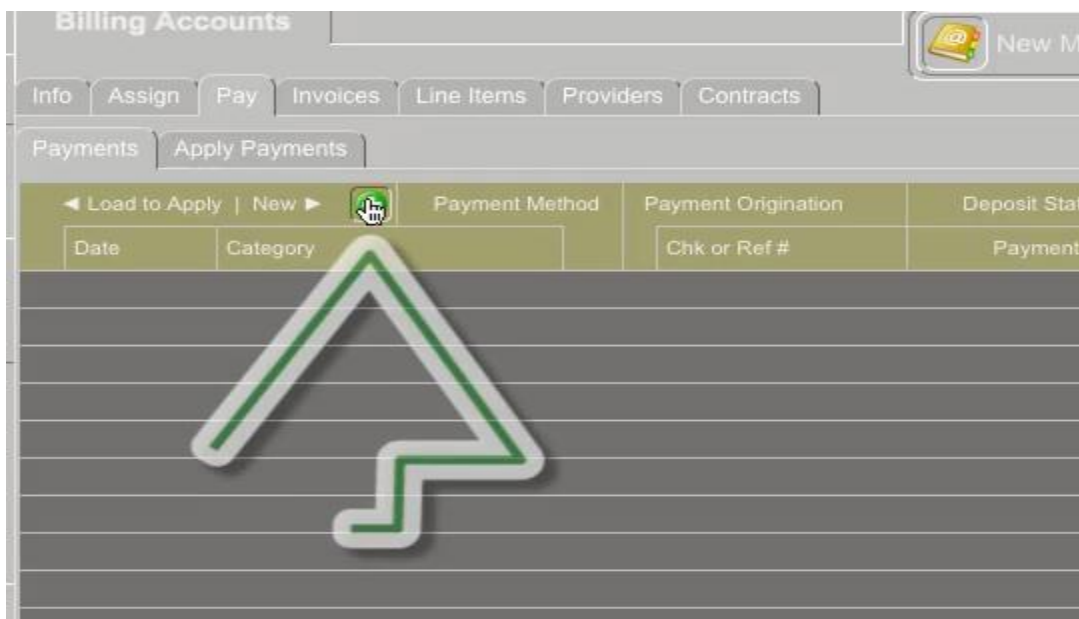


## Client Bill Payments



### Client Bill Payments

- In this section, we look at applying a payment to a billing account. We begin by locating the billing account.
- In this situation, we have received a payment that we wish to apply against two invoices that we have for this client.
- Go to the **Pay** tab and click the green down arrow icon labeled "**New**" to create the new payment.



- Enter the type of payment as a Check payment,
- the reference number and
- the amount, which is for the total balance of \$1046.

# Client Bill Payments

**Billing Accounts** New Mexico Emergency

Info Assign Pay Invoices Line Items Providers Contracts

Payments Apply Payments

**Group** Medical Clinic of New Mexico **Balance** \$ 1046.00

**Selected Payment**

Method CH Ref # 45887 Amount 1046 Un-Applied

Date Saturday, March 12, 2011 Deposit Status N

- The date will default to the current date. However, you can change the date if needed. Click on the down arrow next to the date to bring up the calendar. Click on the date to be used for this payment. Then click the green check mark to make your selection
- We have received one payment and we have two invoices, each with a separate balance. To apply this payment to the first invoice, click on the arrow button on the right of the invoice line and enter the amount to be applied, in this case \$801.

**Selected Payment**

Method CH Ref # 45887 Amount \$ 1046.00 Un-Applied \$ 1046.00 TR Code BP

Date Saturday, March 12, 2011 Deposit Status N **Apply this payment to an Invoice**

Invoice #   Open ( Y/N )	Provider ( Rendering   Referring )	Prov. Chg's	Referral	Amount

**Open Invoices**

Invoice Date	Processed Invoice #	Providers	Total Charges	Total Payments	Total Adjustments	Total Refunds	Invoice Balance
01/31/2011	N CLA181	Maulder, K., MD   McCoy, L., M.D.   Smith, Z.,	801.00				801.00
02/28/2011	N CLA182		245.00				245.00

## Client Bill Payments

Apply this payment to an Invoice

Invoice	Amount	Applied
Smith, Sally	801.00	Applied

Applied Items

Total Payments	Total Adjustments	Total Refunds	Invoice Balance
801.00			801.00
			245.00

- Although this amount could be allocated by referring provider, in this situation, we are not going to consider the referring provider.
- Next we will apply the remaining unapplied amount, which is shown as \$245, against the remaining invoice. Click on the arrow button on the right of the invoice line to apply the remaining amount of \$245. Now both balances are zero and we can see that this payment is applied against the two invoices.

Apply this payment to an Invoice

Invoice	Amount	Applied
Smith, Sally	801.00	Applied
Smith, Sally	245.00	Applied

Applied Items

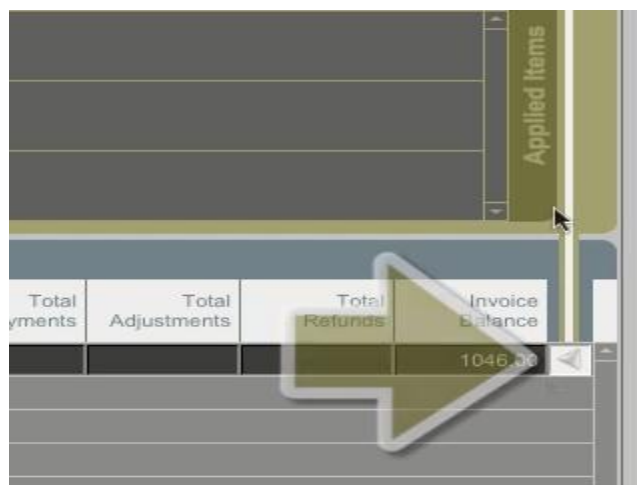
Total Payments	Total Adjustments	Total Refunds	Invoice Balance
801.00			0.00
			245.00

### Splitting Applied Payments by Referring Provider

## Client Bill Payments

You can also track applied items against a referral for marketing purposes to determine actual revenue received based on a marketing campaign, by someone who referred a client to you, by a commission sales person and so forth.

- Begin by selecting on the **Pay** tab and click the **New** button to create a new payment.
- This loads the payment and allows us to enter the method of payment, which in this case will be a check, a reference number and the amount of the payment. In this case, the entire invoice amount of \$1046 is being paid.
- The date automatically defaults to the current date.
- We will apply this payment to the invoice listed on this tab. This list will show only invoices where the invoice status is indicated as “Open”.
- Click on the arrow icon on the invoice line to load an applied item. Enter the entire amount to be applied. If we apply the total amount of the payment to this invoice, we are finished entering the payment.



- However, there are some situations where clients like to track their revenue by either referring, or rendering provider, perhaps for commission purposes, or situations where someone might receive some type of a bonus based on the amount of revenue received instead of the amount of revenue charged. In this case, we’re going to use the referring provider, to the individual applied payments must be made for the individual providers.
- By holding the mouse over the Applied Item we can see that there are multiple referring providers on this invoice.
- Click on the down arrow to do a search and load the referring provider into this column.
- When we selected Kathy Bowden, we see that \$722 of this particular invoice has Kathy Bowden as the referring provider. Change the applied amount to \$722.



## Client Bill Payments

Un-Applied \$ 324.00 TR Code BP

Apply this payment to an Invoice

Referral	Amount
Smith, Sally	722.00
	1046.00

Applied Items

Total Charges	Total Payments	Total Adjustments	Total Refunds	Invoice Balance
1046.00	722.00			324.00

Provider ( Rendering   Referring )	Prov. Chg's	Referral	Amount
		Smith, Sally	722.00
Bowden, Kathy	722.00		1046.00
		Smith, Sally	
O'Brien, Sharon, PT	229.00		1046.00

Providers	Total Charges	Total Payments	Total Adjustments	Total Refunds
Maulder, K., MD   McCoy, L., M.D.   Smith, Z.,	1046.00	722.00		

- We still have \$95 left to be applied. The remaining referring provider in this case is Jackie Blackwell. Click the down arrow to search and load Jackie Blackwell into this invoice. Enter the \$95 into the applied amount.
- This invoice is now complete and has separate applied payments for each of the referring providers throughout the invoice. In many situations, a single payment for the entire invoice will be all that is needed.

# Client Bill Payments

Provider ( Rendering   Referring )	Prov. Chg's	Referral	Amount
		Smith, Sally	722.00
Bowden, Kathy	722.00		1046.00 Applied
		Smith, Sally	
Obrien, Sharon, PT	229.00		1046.00 Applied

Providers	Total Charges	Total Payments	Total Adjustments	Total Refunds
Maulder, K., MD   McCoy, L., M.D.   Smith, Z.,	1046.00	722.00		

- This invoice is now paid. Click on the blue arrow to the left of the invoice line to go to the invoice page.
- Change the status to “Closed” and “Complete”. When we return to the previous screen, we will no longer see this invoice in the list.

**Invoice** | Inv # CLA177 | Account New Mexico Emergency Abduction Care

Invoice Date: 02/28/2011 | Group: Medical Clinic of New Mexico

Charges | Payments | Adjustments | Refunds | All

Date	Item Description	Referring Prov.	Acsn #	Tax	Amount
07/03/2010	Kelly Landers   Acs# 87878744   CPT# 87454	Bowden, Kathy	87878744		95.00
07/09/2010	Leeroy Gibbs   Acs# 9886654   CPT# 11922 CORRECT SKIN COLOR DEFECTS	Bowden, Kathy	9886654		125.00
07/27/2010	Sid Viscous   Acs# 8784411221   CPT# 15850 REMOVAL OF SUTURES	Bowden, Kathy	8784411221		85.00
07/28/2010	Mick Dagger   Acs# 96321455   CPT# 99251 INPATIENT CONSULTATION	Bowden, Kathy	96321455		75.00
08/25/2010	Tod Smith   Acs# 55555555   CPT# 11000 DEBRIDE INFECTED SKIN	Obrien, Sharon, PT	55555555		55.00

Open Processed

Closed	PMT from Primary
Processed	PMT from Secondary
Complete	PMT from Tertiary
Collection Sent	Appealed
Open	Not Verified
Un-processed	Collection Marked
Incomplete	Denied
Verified	PMT from Patient

- Clear the holder by clicking the red minus button at the top right.