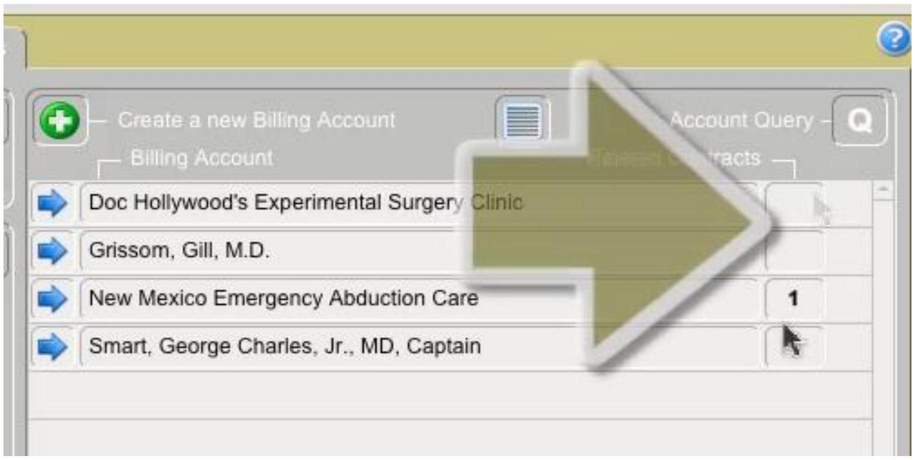
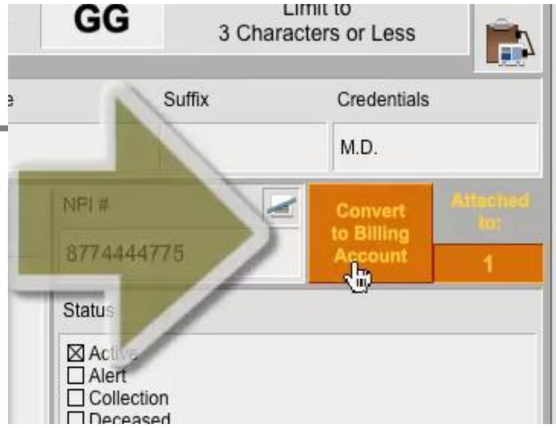
Client Billing Basics

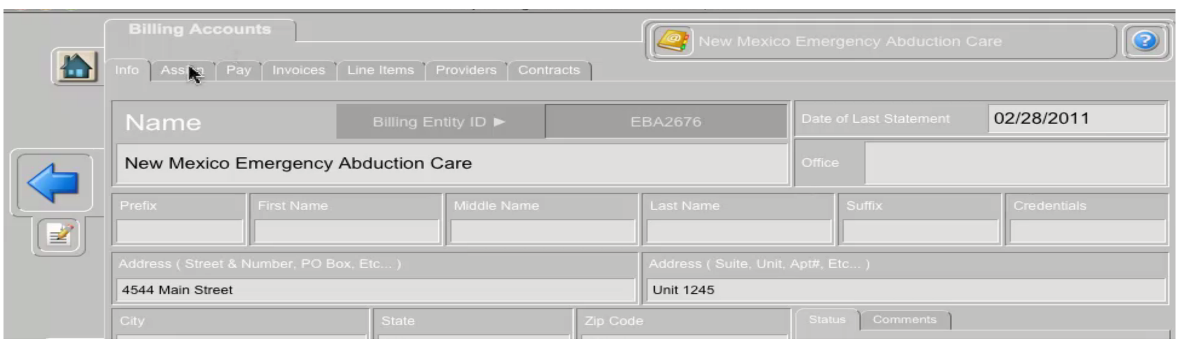
- To create a client bill account, click on the **Carriers/Accounts** menu and go to the **Billing Accounts** tab. Always check first to make sure that the billing account does not already exist.
- On the right of the billing account search screen you will see a column that displays the related contracts. It is important to note that without a related contract and its associated fee schedules, pricing cannot be set automatically.



- To create a billing account from a referring provider, go to the **Provider/Team** menu to select a referring provider.
- Click on the button labeled “**Convert to Billing Account**” to convert the referring provider to a billing account. This method will use the Contact Information from the Provider/Team as a starting point for the new Client Bill Account.



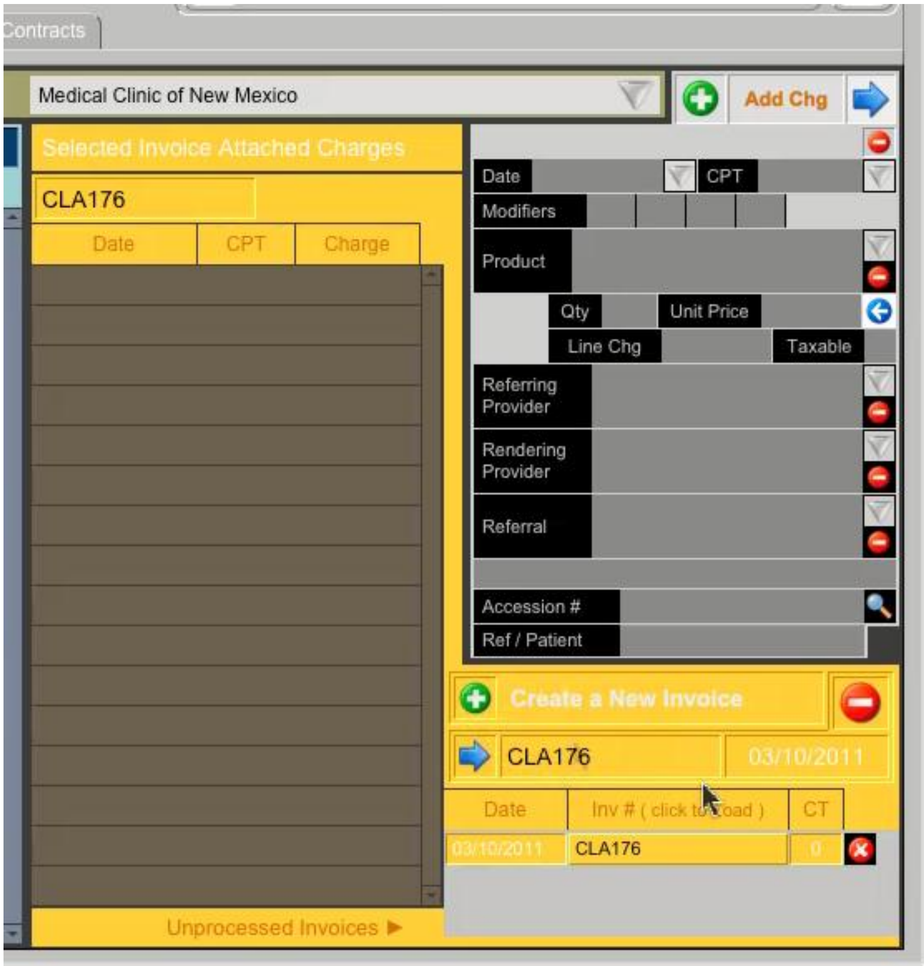
- Not all referring providers will become billing accounts. There are some situations where the referring provider will be the target billing account and some situations where it may be the facility.
- Begin by going into an existing billing account. On the **Info** tab, the “Office” field is optional and is used in situations where we may be billing offices individually and we need a method of distinguishing between multiple offices. DO NOT create separate accounts for offices with different addresses if they are paying from a single office for all.



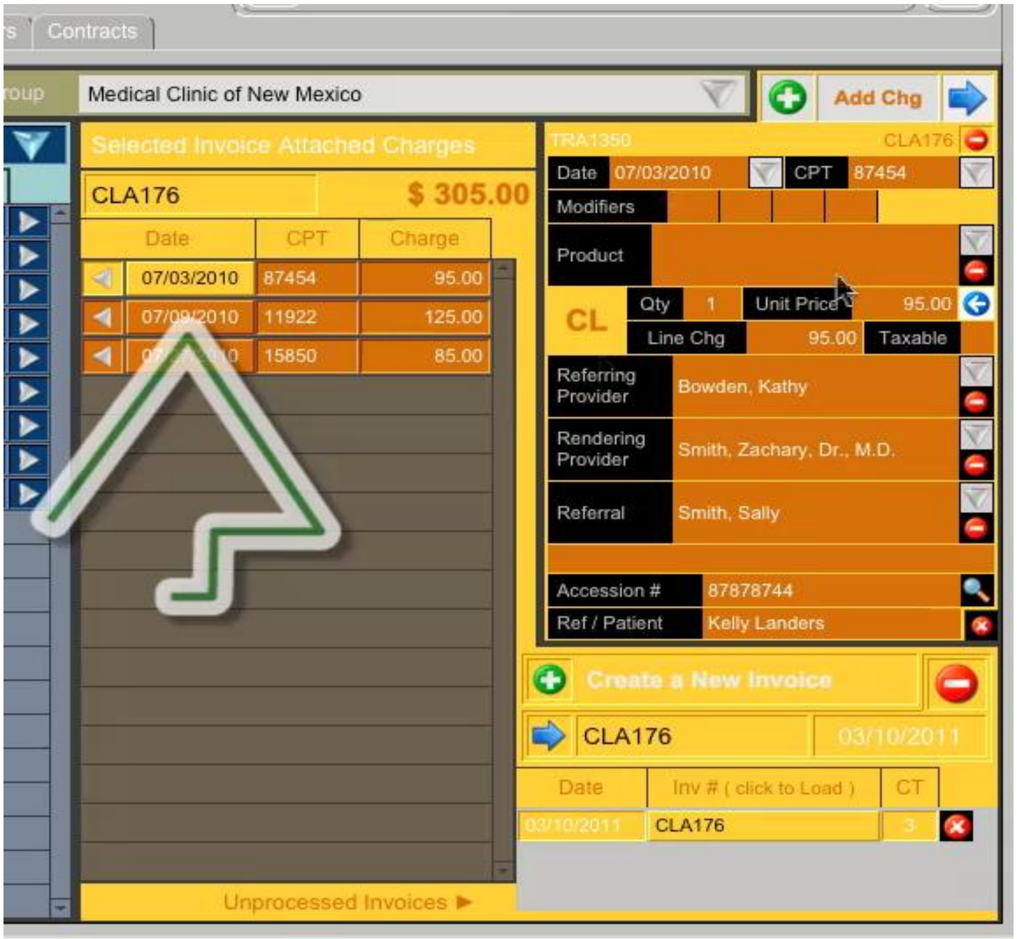
- Next we’ll look at the **Assign** tab. The **Assign** tab displays unattached charges in the left portion of the screen. The items shown will be items that are attached to the selected group and within the selected date range, but have not yet been attached to an invoice. They are called “Unattached Charges” and they have a transaction code of “UN”.

Create a New Invoice

- The center portion of the screen holds the charge lines from a selected invoice. In this case, there is no invoice, so we will create a new one by clicking on the "**Create a New Invoice**" button. This button will create a new invoice and load that invoice into the invoice holder.



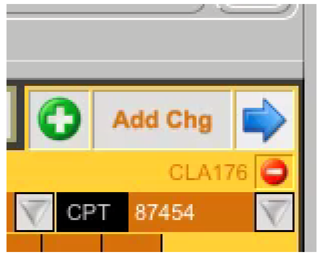
- From here we have the option to load any of these charge lines into this invoice, either all at once, or individually.
- You can also narrow this list down by date range.
- Let's attach a few of these unattached charges to this invoice. These items are now loaded into the "Invoice Attached Charges" section.



- You will notice that the attached invoice items have an orange-yellow glow and the blue items are for the unattached items. If we select an individual charge line, we see that the charge line holder on the right assumes the color of the selected item.
- If an invoice is currently loaded and we create a new charge manually, that new charge will automatically be linked to that invoice. If there is no invoice loaded, that charge will be created as an unattached charge.
- The unattached items on the left portal will typically be filled automatically from an HL7 file that feeds data to Easy Billing Professional.

Manually Created Charges

- You can manually create charges by clicking on the green plus icon labeled “**Add Charge**” on the right.



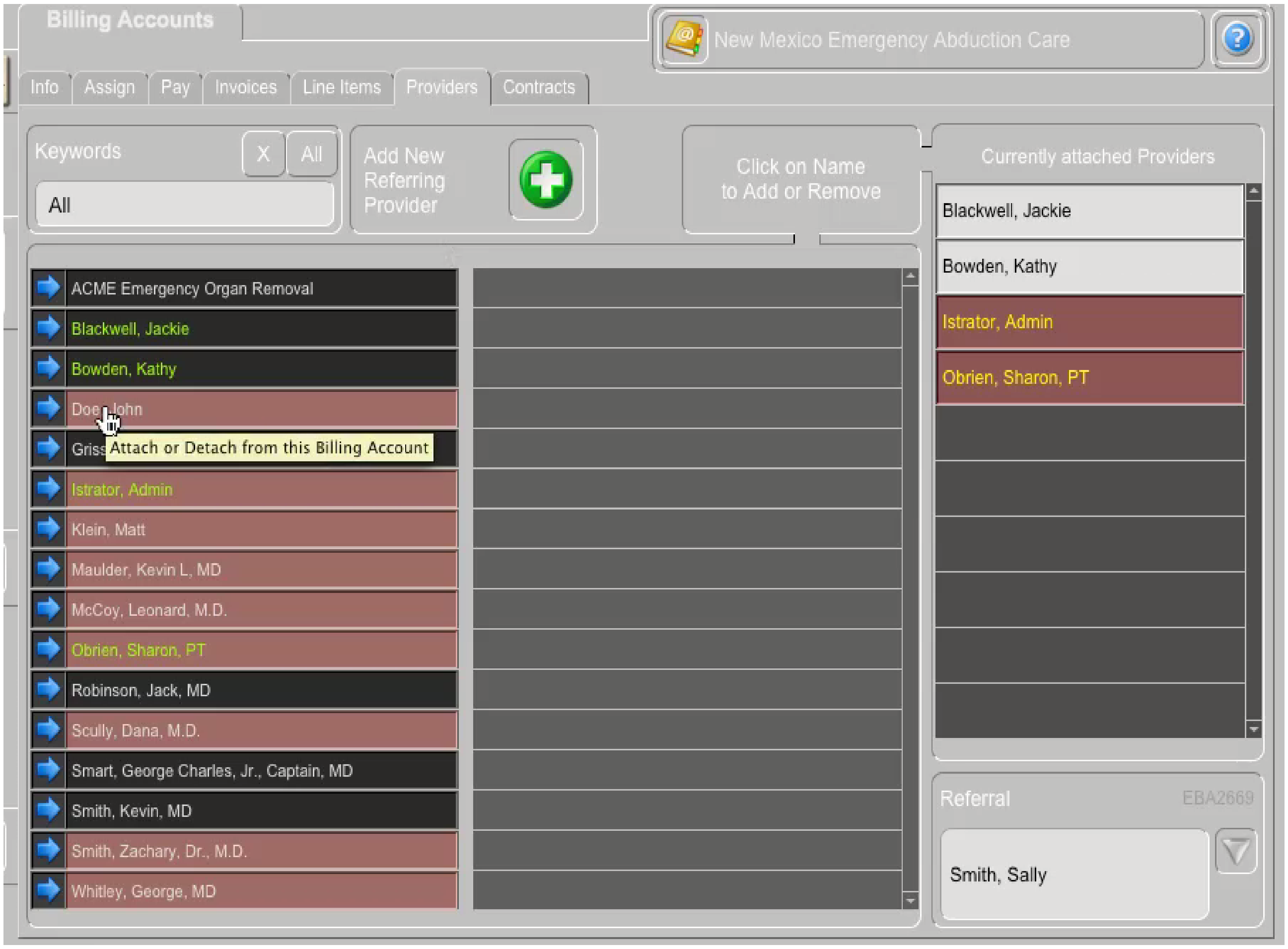
- You can load an existing charge and edit it in the charge holder on the right, or go to the charge screen for more detail editing by clicking on the blue arrow at the top right. Return to the Billing Accounts screen by clicking the blue Back Arrow at the top left.
- You will also see a small portal at the bottom right which holds unprocessed invoices. You should only attach charge lines to invoices that are unprocessed, since processed invoices will typically be invoices which have already been sent to the client.

- At any point, you can navigate directly to the unprocessed invoice by clicking the blue arrow next to it. On the Invoice screen you can change statuses and look at individual items. You can also print the invoice from here.
- This would be considered the manual entry process for charge lines and, in many cases, will be unnecessary, as we also have a batch automated process for people who have a high volume of client bill accounts.

Attached Providers

- With a billing account, typically there will be referring providers, or referring physicians who are attached to that account and, in some cases, by the individual charge line. Many offices will like to keep track of the referring provider at the charge line level. You will see that there is a drop down list in the charge holder that shows the referring providers that are attached to the account. This list will only show the referring providers who are attached to this account.

- On the **Providers** tab, the provider team members displayed with a reddish highlight are not listed as rendering or referring providers. However, provider team members attached to a billing account do not have to be a provider.



Options in the client bill query

- The column which shows the invoice count “Count Invoices”, will only show invoices within the selected date range that are within the selected parameter of either being open or closed and attached to the selected group.
- Note that the end date here is 2/28/2011. If we move this date out one full month to March 31, we see an additional charge line in two of the accounts and an additional amount for unattached items. This is due to the fact that these charge lines came in after 2/28. If you are invoicing by the month, it would be desirable not to show these items. Thus, by limiting our date range to 2/28, balances and charge lines will not be reflected that have not yet been invoiced.

- At any point, you can locate all billing accounts by clicking on the "**A**" button in the billing account query.

- Note the line items that are matched to that account within any given date range. By using the transaction code, we can determine which type of items we see in that list. In this case, the only items that we have here are the "UN" transaction code, which is an unattached transaction.

Date	TR Code	CPT	M1	M2	M3	M4	Product	CHG	ADJ	PMT	RFD	SRC PMT	UNAP
07/03/2010	UN	87454						95.00					
07/09/2010	UN	11922						125.00					
07/27/2010	UN	15850						85.00					
07/28/2010	UN	99251						75.00					
08/25/2010	UN	11000						55.00					
08/26/2010	UN	54545						97.00					
09/09/2010	UN	11004	51					95.00					
10/15/2010	UN	11005						125.00					
10/18/2010	UN	33333						49.00					
02/01/2011	UN	88305						85.00					
02/01/2011	UN	12345						65.00					
02/02/2011	UN	87654						95.00					