

Client Bill Batch Invoices



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The batch invoicing method would be more desirable in situations where you have a large amount of client bill accounts and you want to automate the process of creating invoices, automatically attaching the charges to those invoices.

- The date range determines the transactions and invoices that will be included within this query. For the purpose of invoicing, we will select to the end of February. We will set the end date to 2/28/2011 and we will leave the start date at 1900. The reason we are doing this is that we are going to look for some stragglers that may have come in after the fact, which we will explain in a minute.
- To search for any billing accounts that have unattached charge lines, click on the button labeled “**Find Accounts Needing Invoices.**”
- We see a list of all of the unattached charge lines that are related to each billing account. However, those charge lines must fall within the selected date range and belong to the selected group.

The screenshot shows the Easy Billing Professional software interface. At the top, there are search filters: Range (01/01/1900 to 02/28/2011), Open (checked for Y, unchecked for N), and Group (Medical Clinic of New Mexico). Below these are several summary statistics: Account Name (New Mexico Emergency Abduction Care), Count Invoices (0), In Date Range (12), Count Un-attached (12), Amount Un-attached (1046.00), and a button labeled 'Create Invoices Attach Charges'. A tooltip for the 'Find Accounts Needing Invoices' button says 'This will find Accounts that h...'. Below the summary is a table of account results:

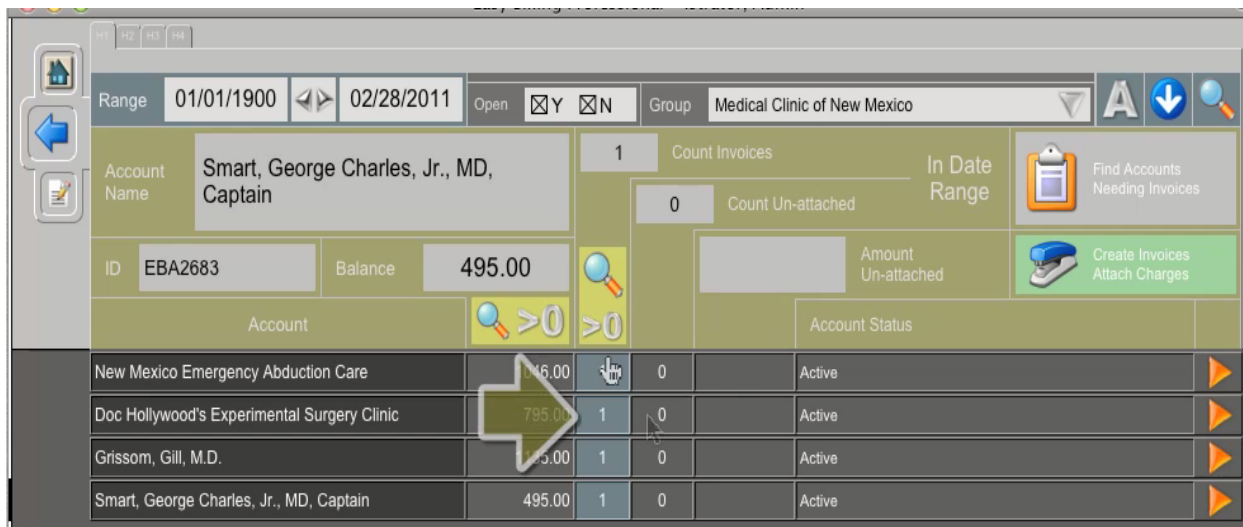
Account	Invoices	Un-attached	Amount Un-attached	Account Status
New Mexico Emergency Abduction Care	0	12	1046.00	Active
Doc Hollywood's Experimental Surgery Clinic	0	3	795.00	Active
Grissom, Gill, M.D.	0	5	1135.00	Active
Smart, George Charles, Jr., MD, Captain	0	3	495.00	Active

- The next step in the process is to invoice these charge lines automatically by clicking on the button labeled “**Create Invoices Attach Charges**”. Clicking this button will create an invoice for each one of these accounts and attach the charge.

Client Bill Batch Invoices



- The date of the invoice will be set to the end date of the selected date range. So the invoice date in this case will be set to 2/28/2011.
- When we click on the “**Create Invoices Attach Charges**” button, we see zero unattached charges in the right column and we see one invoice attached to each of the billing accounts.

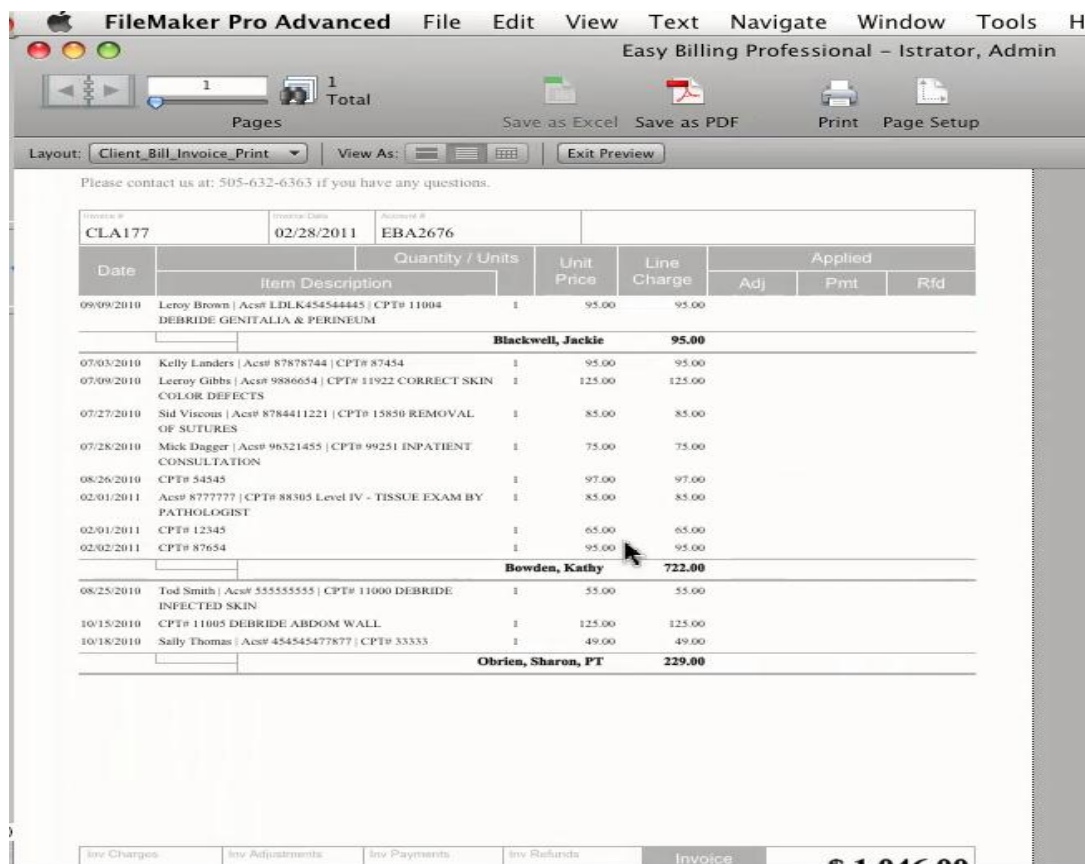


- If we go into one of the billing accounts and look at the **Assign** tab, we see an unprocessed invoice which is holding all of the charges which are now attached to it. You can detach or attach as desired any items within this screen, or select and view, or edit any of these items.

Client Bill Batch Invoices



- We can go to the invoice and individually print that invoice if so desired. Here we see a preview of what this invoice will look like when printed.



Client Bill Batch Invoices

- We have now invoiced all of our clients for the month of February and we also picked up any potential stragglers from prior months which may have not been invoiced, because we set the start date to 1900.

Options in the Client Bill query

- The column which shows the invoices will only show invoices within the selected date range that are within the selected parameter of either being open, or closed and within 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 now add 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.
- We can click on the search icon in the **Count Invoices** column to find any accounts that have one or more invoices.
- If a Purchase Order is required, it can be entered manually by clicking on the **“View Invoices in Query”** button to view the invoices. Click on each line to enter the PO number in the lower right corner for that billing account.

Client Bill Batch Invoices

The screenshot shows the 'Easy Billing Professional - Istrator, Admin' window. At the top, there is a menu bar with options like CLM, FIN, MED, PAY, CAR, PRV, NPI, PT, WKL, TR1, TR2, PT1, OCL, FIX, P1, AI, AP, AA, PRO, ENH, LGL, RPT, CLB, STS, AUX, HL7, 27. Below the menu, there are search filters for 'Date Range' (01/01/1900 to 01/01/2040), 'All' group, and 'Medical Clinic of New Mexico'. There are also buttons for 'Invoice Open' (Y/N) and 'Billing Account Balance' (L/H).

23	Date	Invoice #	Acnt.	Summary Aging	Detail Aging	CHG	PMT	ADJ	RFD	BAL
	02/28/2011	CLA178	Doc Hollywood's Experimental Surgery Clinic	MC		795.00				795.00
	02/28/2011	CLA179	Grissom, Gill, M.D.	MC		1135.00				1135.00
	02/28/2011	CLA180	Smart, George Charles, Jr., MD, Captain	MC		495.00				495.00

At the bottom, there is a summary panel for invoice CLA180. It shows the 'Billing Account' as EBA2683 and the provider as 'Smart, George Charles, Jr., MD, Captain'. The address is '88 Lakeview Lane, Unit 4, Merrilan, WI 54754'. The summary table shows:

Totals for Account in Date Range	CHG	495.00	BAL (In Range)	495.00
	PMT		BAL (Prior)	
	ADJ		Account Balance Due	590.00
	RFD		PO 123980	

There are also buttons for 'Enter Purchase Order Number' and 'Unap. Amt'.

- Return to the Client Bill Query by clicking the blue Back Arrow. There you can batch print the invoices.
- The next step would be to print these invoices. The typical process would be to create PDF files of all the invoices in this batch, by clicking the button labeled **Create PDF of Invoices**”.

Doc Hollywood's Experimental Surgery Clinic		0	3
Grissom, Gill, M.D.		0	5
Smart, George Charles, Jr., MD, Captain		0	3

Below the table, there are four action buttons:

- View Invoices in Query
- Statements Balance FWD
- View Transactions in Query
- Create PDF of Invoices

Client Bill Batch Invoices

- This process will create a PDF file showing all of these invoices. It then opens the PDF file to preview and print. The PDF file will be in the user's Default Statement Path.

The screenshot shows a software interface for a user named 'Obrien, Sharon, PT'. The 'Access' tab is selected in the top navigation bar. Below the navigation bar, there are two rows of settings. The first row is for 'Default Statement Path', which is currently set to '/C:/Users/Admin/Desktop/'. The second row is for 'Default 837 Path (Outbound)', which is currently empty. Both rows have a 'Fix Path' button and a set of buttons for 'Documents', 'Desktop', 'FileMaker', and 'Temp'.