Send Personal Bills

PCC

Pediatric EHR Solutions

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1. Generate Bills: The Bills Program

The **bills** program generates personal bills for your accounts quickly and efficiently. It has many configurable options and can be run in several different ways. From within the **bills** program you can also add a customized billing message to your bills and review the list of bills waiting to be generated.

If you print your bills on paper and mail them in-house, you run the **bills** program. If you have Partner send your personal bills out electronically, printed and mailed by a third party, you use the ebills (**ebs**) program. Both of these programs work the same way.

Note: PCC encourages all clients to consider electronic personal billing. When printing, packaging, and mailing costs are considered, many practices discover that electronic billing saves both time and money while producing bills of a more professional quality.

2. Quickstart: Send Personal Bills

Follow this procedure to print or generate the outstanding bills for your office:

Step 1: Run Bills

Select **bills** or **ebs** from the "Personal Billing" section of the "Billing Functions" window in Partner's windows. You can also type **bills** or **ebs** at a command prompt.

Step 2: Press [F1 -- *Make Changes*]

When you first run **bills** or **ebs**, you will see the settings that were used the last time you ran the program. Press **F1** to make changes.

Step 3: Update the "End" Date

Change the "End" date so it indicates today's date. Otherwise, your bills will not take into account the most recent charges and payments. The start date will indicate how far back you wish to display detail about the account's balance. Anything prior to that date will appear on the bill as a "Previous Balance."

Step 4: Optional: Add Other Bill Criteria

If you wish, use the other fields on the screen to limit what bills will be generated. See *Your Office's Billing Cycle* for more details.

Step 5: Press [F1 -- *Save Changes*]

Step 6: Press [F2 -- *Prepare Bills*]

Partner will gather charge and payment information and prepare the bills. This may take a while, as Partner must review the balances for all outstanding accounts.

Step 7: Optional: Review Results

When you are returned to the billing screen, you will see a "Messages" section on the bottom telling you how many bills are in the batch waiting to be generated:

```
Messages:

    I am prepared to print 445 bills.
           44 Regular Bills
          219 Accounts Overdue   30 Days
          100 Accounts Overdue   60 Days
           41 Accounts Overdue   90 Days
           41 Accounts Overdue  120 Days
```

If you wish, press [**F7** -- *Show BillList*] to review what families are waiting in this current batch of bills. Read the *Review Accounts With Bills* section for more information.

If you leave the **bills** program to work on those accounts, remember to press [**F1** -- *Make Changes*], save, and press [**F2** -- *Prepare Bills*] to re-prepare the bills when you return. Repeating those steps ensures that any changes you made to account balances are reflected in the bills you generate. If you don't re-prepare, you will print the same batch of bills you originally prepared.

Step 8: Press [F3 -- *Print Bills*]

When you are ready to generate your bills, press [**F3** -- *Print Bills*]. If you are running **ebs** for electronic bills, press [**F3** -- *Submit Bills*].

Function Keys in bills and ebs

[**F1** -- *Make Changes*]

Press [**F1**] to change items on the main **bills** screen. You should *always* change the end date.

[**F2** -- *Prepare Bills*]

Press [**F2**] to prepare a batch of bills based on the screen criteria.

[**F3** -- *Print Bills/Submit Bills*]

Press [**F3**] to print or send your bills electronically, depending on the program you are running. This function is only available once you have prepared a batch of bills.

[**F5** -- *Print One Bill*]

Press [**F5**] to print a single bill for a single account.

[**F6** -- *Edit Bill Msg*]

Press [**F6**] to review or change your batch billing messages.

[**F7** -- *Show BillList*]

Press [**F7**] to display a bill list of everyone currently prepared to receive a bill.

[**F8** -- *Discard Changes*]

While making changes to the bill criteria, press [**F8**] to discard your changes and return to the main **bills** screen.

3. Generate One Bill

In addition to the "batch" bill printing, you can also generate a single bill for any family:

Step 1: Run the Bills Program

Step 2: Press [F5 -- *Print One Bill*].

Step 3: Find the Family that Needs a Bill

Step 4: Enter a Date Range for the Bill

Step 5: Press [F1 -- *Print Bills*] to Print the Bill
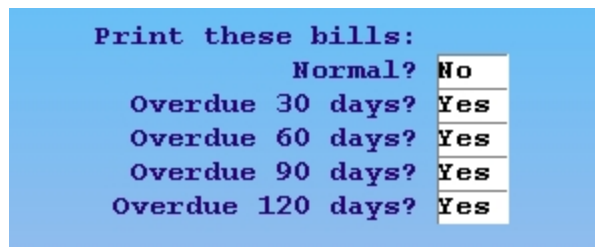
4. Use Cycle Billing to Generate Some Bills

You can use cycle billing to spread your bills out throughout a month or other period of time. With cycle billing, your revenue and billing workload will stretch throughout the month.

Some offices prints current (or "normal") bills on the first of the month and then print overdue bills on the fifteenth. Some offices perform a bill run weekly, based on the family's last name. Other offices print bills every week or every day and have Partner automatically find every account with a balance that has not received a bill within 30 days. These are all different types of cycle billing.

You can control your billing cycle manually or automatically.

4.1. Manual Cycle Billing

You can manually control your billing cycle by changing the criteria options on the **bills** screen. Using the criteria options, you can limit: the age of bills to print, what zip codes will print, or what part of the alphabet will print. For example, perhaps you send "Normal" bills at the first of the month using the **ebs** program, and then you run **bills** the following week to print all overdue bills in-house. You could do this by changing the "Normal?" and "Overdue...?" questions on the **bills** and **ebs** screens.
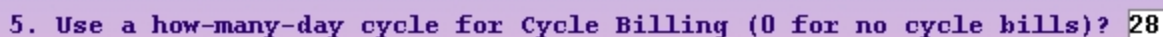

Similarly, you can control your billing cycle manually by printing a certain zip code or alphabet range at different times during the month. Set all of these options when you press [**F1** -- *Make Changes*] before preparing your bills.

4.2. Automatic Cycle Billing

The other way to control your billing cycle is to let Partner calculate which families should get a bill. Once you tell Partner how often an overdue account should receive a bill (28 days, for example), you can run your bills every day (or at any interval) and everyone who is due for a bill will receive one.

Activating an automatic billing cycle and running **bills** weekly (for example) can lead to faster and more efficient collections. Accounts will receive a bill within a week of their visit and they will never accidentally receive more than one bill within a cycle. An added advantage is that your billing workload and income from personal bills will be evenly divided throughout the month (or whatever your cycle length).

First, set how often you would like families with balances to receive a bill (every 28 days, for example). PCC can help set this up for you, or you can change it yourself in the Personal Billing section of the Configuration Editor (**ced**):

Once automatic cycle billing is turned on, your office can run **bills** weekly (or at any interval shorter than the cycle) for all families and all ranges. Partner will check all outstanding balances and only generate a bill if the family has not received a bill for 28 days (or other interval). If a family visits again or accrues new charges, they will be bumped out of the cycle and will receive a bill immediately.

5. Review List of Accounts that Will Be Billed

After preparing your bills, you might press [**F7** -- *Bill List*] to review the list of every account about to get a bill. This report, which can be sent to the screen or a printer, lists accounts grouped by billing category.

To use **billlist** successfully, you must consider *when* you are running it. If you run **billlist** before you prepare your bills, the list will be empty (or based on the last time bills were prepared). If you print **billlist**, make changes to the accounts, and then re-prepare your bills, the list you printed will be out of date. Finally, if you wait until *after* you print bills, your list will be blank because no accounts will need bills. For these reasons, you should follow this procedure:

Step 1: Run the bills Program

Step 2: Set Billing Criteria

Press [**F1** -- *Make Changes*] and update the "End" date as described in the **bills** procedure.

Step 3: Press [F2 -- *Prepare Bills*]

There will be a pause as Partner prepares the bills.

Step 4: Press [F7 -- *Bill List*] to Review the Accounts

You will be asked if you want the list sent to your screen or to the printer.

Once you have the list, you can exit the **bills** program and make changes to various accounts or write off faulty balances. *Remember to repeat the steps above to re-prepare your bills when you return.*

Step 5: Press [F3 -- *Print Bills*].

Here is a sample **billlist** report:

Page Up	F12	Page Down
2004-06-16 11:39	People To Receive Normal Bills	Page 1

Tisby, Thomas, (#17205)	54 Autumn St	$ 82.50
Harrod, Demetra (#17679)	118 Jersey St	$ 396.40
Wences, Lola (#19054)	34 Rainbow Terrace	$ 247.00
Deroy, Rory (#20763)	12 Grove St	$ 35.00
Sparrow, Ta'Destiney (#19600)	4 Turner St	$ 239.00
Mccrimmon, Ishmel (#11636)	40 Beaver St 2 Flr	$ 140.00
Justice, Eddie (#7923)	23 Purchase St, 2Nd Floor	$ 44.00
Crumpton, Rena (#15311)	29 Summit Street	$ 31.00
Ganey, Tajh (#18462)	RR 1 Box 24	$ 929.65
Mauldin, Nakaja (#15357)	44 Irving St	$ 13.00
Ganas, Tajanna (#14188)	18 Gardner St 1St Fl	$ 458.95

6. Bill Messages

A billing message is a brief note that appears on a personal bill. Both paper and electronic bills can include a customized billing message. You can enter a family-specific billing message on the notes page of the Family Editor (**fame**). You can also use the **billmsg** program to change the billing messages that appear on all of your Normal, 30, 60, 90 and 120-day bills. Here are a few examples of messages that offices use:

- New Provider: "We would like to welcome Dr. Smith to our practice!"
- Open House: "Come see our new facilities at 10 Main St. from 9am-4pm."
- Credit Card Payments: "We now accept VISA card payments."

In addition to these general messages, you can also include messages specific to each billing category. For example:

- Current: "Thank you for your patronage."
- Overdue 30: "Payment is now past due. Please send payment promptly."
- Overdue 60: "Failure to pay balance due in full may result in termination."
- Overdue 90: "Your account, with an outstanding balance of <amount>, may be sent to collection. Please contact the office."
- Overdue 120: "Your account, with an outstanding balance of <amount>, will be sent to a collection agency in 30 days."

When you print your bills, the appropriate bill message will print automatically. If a category doesn't have a specific message, then a *default* message will be used instead (if it exists).
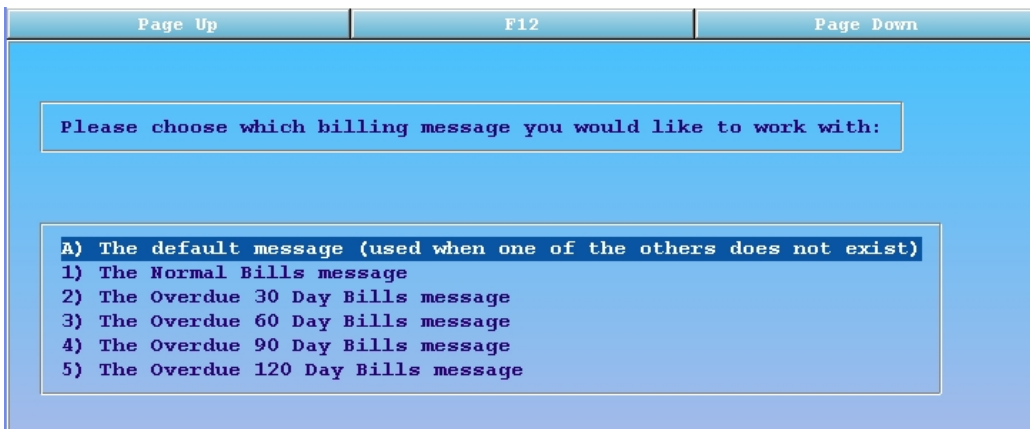
Note: The Current-30-60-90-120 day batch billing messages will appear *in addition* to the personal billing messages stored in the Family Editor (**fame**).

6.1. Change Your Billing Messages

You can review, delete, add, or change any of your global billing messages through the **billmsg** program.

From the **bills** program, press [**F6** -- *Bill Message*] to run the **billmsg** program. You can also type **billmsg** at a command prompt.

When you start **billmsg**, you will be presented with a list of choices:

Please choose which billing message you would like to work with:

```
A) The default message (used when one of the others does not exist)
1) The Normal Bills message
2) The Overdue 30 Day Bills message
3) The Overdue 60 Day Bills message
4) The Overdue 90 Day Bills message
5) The Overdue 120 Day Bills message
```

Use the arrow keys to make your selection and press **Enter**. If a billing message for your selection currently exists, it will be displayed at the top of your screen and you will be given options to change it or keep it. If the message you selected has never been configured, you will be offered the chance to create it.

Whenever you make changes, **billmsg** will ask you to confirm that you want to over-write the old message with the new one.

Amount Variable: You can add a variable that will be replaced with the amount of the bill: <amount>. See the "Overdue 90" and "Overdue 120" examples above.

7. Review the Bill Log

Every time you generate a batch of bills, Partner keeps a record in the Bill Log (**billlog**) program. You can use **billlog** to review details about your bill batches, find out who received a bill in each bill run, research why a family did *not* receive a bill, or examine a digital copy of any personal bill.

7.1. Run the Bill Log Program

You can run the bill log by pressing [**F8** -- *View Bill Log*] in the Bills program.

You can also select Bill Log from the Personal Billing window in your Partner windows, or you can type **billlog** at a command prompt.
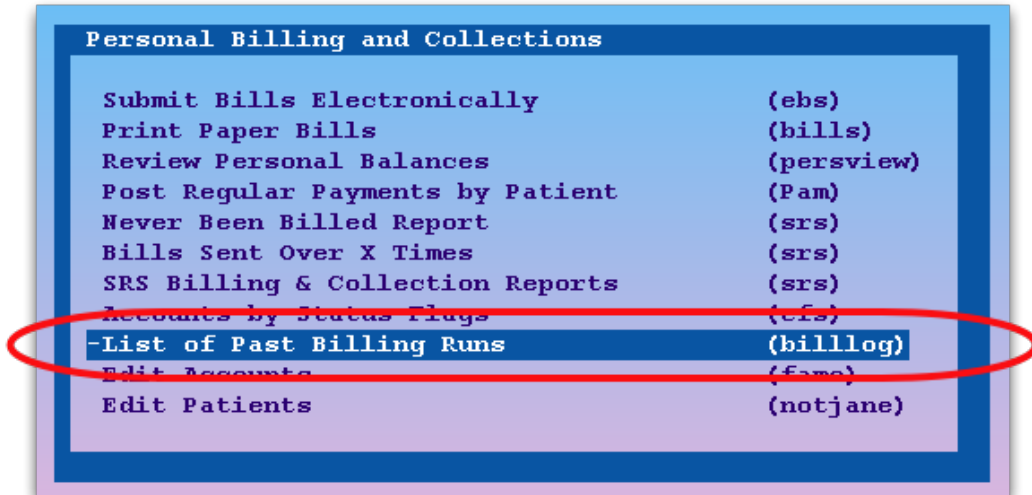
7.2. View the List of Past Bill Batches

The Bill Batch Listing screen in **billlog** displays each billing batch your office has run since the Bill Log program was updated in 2009.

For each entry, you can see the date the bills were submitted, the user who submitted the bills, and the billing batch criteria (date, zipcode range, alphabet range, and aging categories). **Note:** In the example above, the user "sploof" generated bills repeatedly to test the new billing system.

Use the arrow keys to select a bill batch entry. Press [**F1** -- *Accounts Billed*] to review accounts and bills in the bill batch. Press [**F2** -- *Accounts Not Billed*] to view all accounts that did *not* receive a bill.

7.3. View the List of Accounts Billed

Select a bill batch in **billlog** and press [**F1** -- *Accounts Billed*] to view a list of accounts that received a bill in that bill run.

For each account, you can see the account name and the bill amount. You can use function keys to sort the list by last name or by total bill amount.

7.4. View a Copy of an Old Bill

While viewing a list of accounts billed in **billlog**, use the arrow keys to select an account and press [**F1** -- *View Bill*] to see an electronic copy of that bill.

```
      View
      Bill
```

↓

```
   Jeffrey Addington                      Doctors Office
   730 Grandview Drive                    123 Main Street
   Saint Albans Bay, VT   05481           Springfield, VT   1


                                          (xxx) xxx-xxxx



                    Please Detach And Return Top Portion With Your Paym
| Date of |    Description of Services From    |              | Payments & | Due Fr
| Service |         01/01/80 to 12/07/08       | Charges      | Adjustments| Insura
            BALANCE FORWARD

Abigail Addington (~Dr. Casey, Office)
 02/26/07   OV Expanded Focus               $   56.00
            02/26/07 Visa Card Payment                        $   10.00-

Abigail Addington (~Dr. Williams, Office)
 03/07/07   Urinalysis with Microscopy      $   13.00
 03/07/07   OV Detailed H&E                 $   87.00

Nathaniel Addington (~Dr. Williams, Office)
   Quit    Jump to   Jump to    Send                                      Search
           Top       Bottom     To...                                     Pattern
```

Use the Page Down, Page Up, and arrow keys to navigate the electronic bill. The appearance of the bill on the screen will not precisely match the printed layout, but all content is otherwise identical.

7.5. View All Accounts Not Billed

Select a bill batch in **billlog** and press [**F2** -- *Accounts Not Billed*] to review accounts that did not receive a bill for that bill run.


```
ts  Accounts
    NotBilld
```

↓
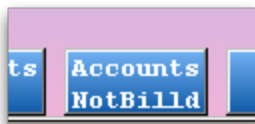
```
                    Bill Log - Accounts Not Billed

Achey, Jeremy            (#1465)    Personal balance $    0.00    below cutoff $    4
Acker, Patricia          (#28)      Account balance $     0.00    is not greater then
Adams, Ambrocio          (#1962)    Account balance $     0.00    is not greater then
Adams, Herb              (#1348)    Personal balance $    3.26    below cutoff $    4
Adler, Craig A.          (#1185)    Account balance $     0.00    is not greater then

Aeberhard, Anthony       (#156)     Personal balance $    0.00    below cutoff $    4
Aftosmes, Cheryl         (#288)     Personal balance $    1.60    below cutoff $    4
Agarwal, Mark            (#618)     Account balance $     0.00    is not greater then
Ahson, Alejandro         (#1830)    Account balance $     0.00    is not greater then
Albert, Dale             (#724)     Account balance $     0.00    is not greater then

Albert, Roy              (#1504)    Account balance $     0.00    is not greater then
Albert, Scott            (#793)     Account balance $     0.00    is not greater then
Alger, Tricia            (#649)     Account balance $     0.00    is not greater then
Alleman, Laverne M       (#1935)    Account balance $     0.00    is not greater then
Allen, Donald            (#57)      Account balance $     0.00    is not greater then

Allison, Dean            (#317)     Account balance $     0.00    is not greater then
Allison, Hank            (#431)     Account balance $     0.00    is not greater then
```

| Quit | Jump to Top | Jump to Bottom | Send To... | | | | Search Pattern |

For each account, you can see the account name, the account PCC number, and the reason that the account did not receive a bill.

Scroll, Send, and Search: The Accounts Not Billed list is displayed using the report display program (**pless**). The function keys allow you to jump to the bottom or top of the report, redirect the output to a printer, an e-mail address, or a file, or enter a search pattern.

If you are researching a problem with an account, for example, press [**F8** -- *Search Pattern*], enter the account name, and press **Enter**.

Search Pattern: Adams   Search on whole words: No

```
Adams, Ambrocio     (#1962)    Account balance $   0.00  is not greater then zero.
Adams, Herb         (#1348)    Personal balance $ 3.26  below cutoff $   4.99.
Adler, Craig A      (#1185)    Account balance $   0.00  is not greater then zero.
```