TUTORIAL: Invoicing

Billing Types

Billing Types are established to combine the rules and fees you will use for quoting and invoicing patients and 3rd Parties. There is no limit to the number of Billing Types, but we recommend that you have, at least, the following:

- 3rd Party or Health Fund
- Private

When a referral is created, one of the options is to select the Billing Type. This can be changed at the time of creating the invoice.

Invoice Types

When creating the invoice there are a number of options to choose from.

|	
Patient Invoice	Invoice is addressed to the patient
3rd Party Schedules	A fee will be added to a schedule invoice for a 3rd Party. A schedule invoice will include multiple patients & services on the same invoice.
3rd Party Billing	Invoice will be addressed to a 3rd Party, who is paying on behalf of the patient.
Split Invoice	Two separate invoices will be created – one addressed to the patient and the other addressed to a 3rd Party.
No Charge	An entry is created that a patient was seen but there is no charge.
Bulk Billing Medicare	A fee will be added to a Medicare schedule invoice for the Medicare rebate amount (Aust.)
HIC In-Hospital	Electronic invoicing where services are provided In-hospital and the fee charged is more than the Medicare rebate (Aust.)
HIC Out-of-Hospital	Electronic invoicing where services are provided away from the hospital and the fee charged is more than the Medicare rebate (Aust.)
Inventory Invoice	Create an invoice using items from the Inventory
ACC Schedule	A fee will be added to an ACC schedule invoice (NZ)
Maternity Benefits	Maternity claiming using Section 88 (NZ).

Invoicing the Patient

1. Go to *Patient* → *Financials* → *New*
2. Check the 'Billing Type' is correct (if not, check the 'Change Billing Type' option and you will be prompted to select an alternative Billing Type)


3. Select 'Patient Invoice' from the options.
4. Start entering the first Item.

    a. Date of Service
       Press Enter to automatically insert today's date, or type in the date that the service was provided.
    b. Item
       Type in the partial or full code for the fee item you want to use, then press the F8 (Quick-codes) function key. This will automatically insert the correct annotation text and the fee. Items are created in *Setup* → *Charges*.
       Alternatively, manually type in the item, annotation & fee. The manual method is not recommended as it not possible to include free-hand items into reports that group by

Item type e.g. Sales Analysis
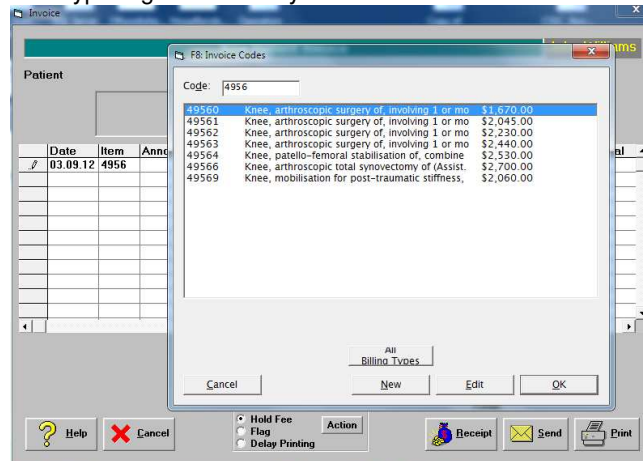
c. Annotation
If the text associated with the Item has not already been entered, type it in. Note that the text does not wrap onto sequential lines.

d. Net
Type in the value of the fee (GST exclusive). If the User The GST will be calculated (if applicable) and the total charge inserted into the 'Amount' column.

e. Pr
Allows you to enter pre-defined step-down rates for multiple entries e.g. 1st procedure at 100%, 2nd procedure at 50%, 3rd & subsequent procedures at 25%.
The step-downs are entered as A, B, or C (A = 100%, B = 50%, C = 25%)

f. Total
Total charge calculated, including the step-down rate.
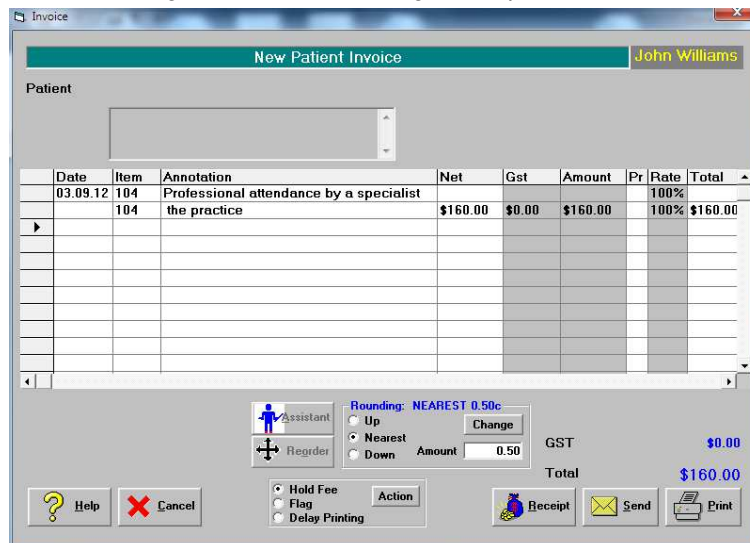
5. Continue entering additional Items to the invoice
6. When complete, select either:
   - Print   to print the invoice
   - Send   to email the invoice to the patient
   - Receipt to receive payment of the invoice

Bishop T Patient
99 WHERE ST
CITYTOWNTEST

TAX INVOICE 130
GST No: 123 456 78
NZMC No: 12345
3 September 2012

To Professional Services

For   Bishop TEST PATIENT

Date	Item#	Description	Net	GST	Amount
03.09.12	104	Professional attendance by a specialist in the practice	160.00	0.00	160.00
		Total (includes GST of $0.00)			**$160.00**

Invoice to 3rd Party

The 3rd Party, who will be receiving the invoice, can be listed in the Referral screen
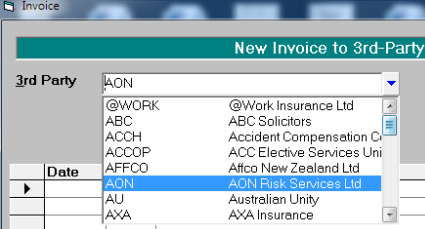
Billing Type	3rd Party	▼
3rd Party	AON	AON Risk Services Ltd, PO Box 1443, HASTINGS

or selected at the type of creating the invoice.

If the 3rd Party is not listed you can add them in *Setup → Contacts → 3rd Party Billing/Reports'*

1. Go to *Patient → Financial → New*
2. Select '3rd Party Invoice'
3. Start entering the invoice details
    a. 3rd Party
        If not already selected, choose the 3rd Party from the list.

    b. Date of service
        Press Enter to automatically insert today's date, or type in the date that the service was provided.
    c. Item
        Type in the partial or full code for the fee item you want to use, then press the F8 (Quick-codes) function key. This will automatically insert the correct annotation text and the fee. Items are created in *Setup → Financial → Charges → Invoice Items*. Alternatively, manually type in the item, annotation & fee. The manual method is not recommended as it not possible to include free-hand items into reports that group by Item type e.g. Sales Analysis
    d. Annotation
        If the text associated with the Item has not already been entered, type it in. Note that the text does not wrap onto sequential lines.
    e. Net
        Type in the value of the fee (GST exclusive). The GST will be calculated (if applicable) and the total charge inserted into the 'Amount' column.
    f. Pr
        Allows you to enter pre-defined step-down rates for multiple entries e.g. 1st procedure at 100%, 2nd procedure at 50%, 3rd & subsequent procedures at 25%.
        The step-downs are entered as A, B, or C. The step-down percentages are defined for each Billing Type e.g. A = 100%, B = 50%, C = 25%
    g. Total
        Total charge calculated, including the step-down rate.
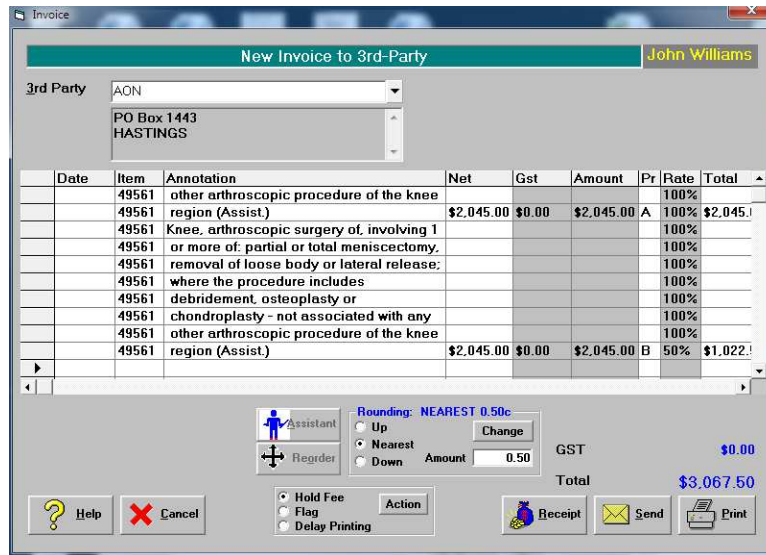
4. Continue entering additional Items to the invoice
5. When complete, select either:
   - Print   to print the invoice
   - Send   to email the invoice to the 3rd Party
   - Receipt to receive payment of the invoice

Total owing

At the bottom of the Transaction screen, the total amount owing by the patient, or parties billed on behalf of the patient, is listed.

Total Owing	
Patient	10,819.7
Fee(s) on Hold	140.00
Affco New Zealand Ltd (AFFCO)	1,670.00
Accident Compensation Corporation (AC	2,045.00

Display invoice details

To display the details of the invoice, highlight the transaction in Patient → Transactions, and press the Spacebar on the keyboard.

| Transactions		New Edit Delete	Display Print Label	Charge Resend Maternity/Obst Receipt		
Date	Type		To/From	Charges	Paid	Owing
	2012					
03.09.2012	Invoice	131	AON	3,067.50		3,067.50
03.09.2012	Invoice	130	Patient	160.00		160.00
25.01.2012	Invoice	122	Patient	160.00		
01.01.2012*	Receipt	65	Patient		-165.00	
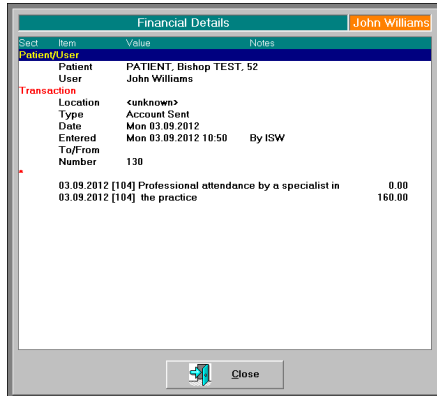
Printing the invoice

Once the invoice has been printed, if it is reprinted it will include the words 'Copy of Invoice'.

To reprint an invoice, highlight it in *Patient → Financial* and select the Print option from the toolbar.

Altering the contents of an invoice.

Once an invoice has been partially or fully receipted it is not possible to alter or delete the invoice, without first deleting the receipt.

Highlight the invoice you want to alter and click on the *Edit* button. Your will be prompted with a warning informing you that a new invoice number will be issued for the amended invoice.
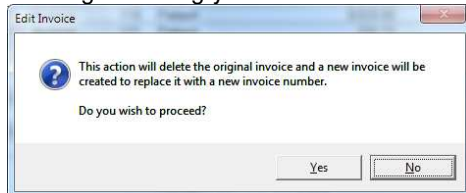
An audit trail is produced of the reversal.

Invoice a Solicitor

Where a solicitor is involved with the patient's referral and requests reports or other information from the specialist, there is a function in SPM to very easily create an invoice to the patient's solicitor.

Invoicing the solicitor is especially common for patients who have work or accident related conditions.

Configuration

The Billing Type and the Solicitor address file need to be configured.

1. Go to *Setup → Financial → Charges → Billing Type* and edit the relevant Billing Type e.g. Workcover.

2. Check on the 'Allow Solicitor' option and click OK to save..

3. Go to *Setup → Contacts → Billing/Reports* and create or edit an entry for the solicitor. Ensure the 'Is a Solicitor' field is checked on. Click OK to save and exit

Referral

When the referral data is entered, and a Billing Type is selected that has the 'Allow Solicitor' option checked on, an option will appear allowing the solicitor to be entered as well.

1. Go to the Patient module and select the patient.
2. Create or edit the referral
3. Select the 'Billing Type' and then enter in the 3rd Party.

Billing Type	Workcover	
3rd Party	WC	Work Cover, 123 King St, Canberra
Solicitor		

4. In the 'Solicitor' field, start typing in some part of the solicitor's name. As you do a search form will appear. Press the Enter key or select the Search button.

Code or Name	AB	Filter		Search

The search will only include the Address File entries that have the 'Is a Solicitor' option checked on.

Select Solicitor			
Code or Name	AB	Filter	Search

Found 1 records.

Code	Description	Address
ABC	ABC Solicitors	123 King Street, Timbuktu

5. Select the solicitor from the list and click OK. This will insert it into the Referral screen.

Billing Type	Workcover	
3rd Party	WC	Work Cover, 123 King St, Canberra
Solicitor	ABC	ABC Solicitors, 123 King Street, Timbuktu

Invoicing

When you proceed with the invoicing, a 'Solicitor Invoice' option will appear which, when selected, will automatically create an invoice to the Solicitor entered in the Referral.

1. Go to the *Patient* module and select the patient.
2. Go to *Financial → New* and check on the 'Solicitor Invoice' option.

☑ Solicitor Invoice

If you are invoicing another party as well you can check on more than one option and the invoices will be created consecutively.

3. The invoice entry form appears with the Solicitor's name and address already entered.

New Invoice to Solicitor		
Solicitor	ABC	
	123 King Street Timbuktu	

|	Date	Item	Annotation
✏	18.09.12		

4. Complete the invoice and Print or Send.

Advanced

Invoice options

Fee-on-Hold

A Fee-on-Hold is a charge that you have allocated to the patient, but have not yet included it on an invoice. The Fee can be converted to an invoice at any time. Each time you go to create an invoice for the patient, a message will appear asking if you want to use the Fee to create the invoice.
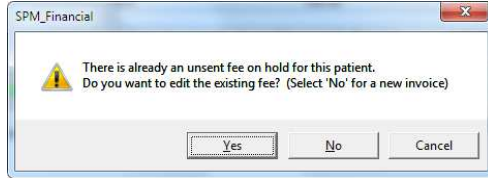
Flag

Applying a 'Flag' is only applicable if there is a Fee on the patient's file and you want the fee to be automatically converted to an invoice when the next 'Accounts Run' *(Office → Invoices → Accounts Run)* is activated.
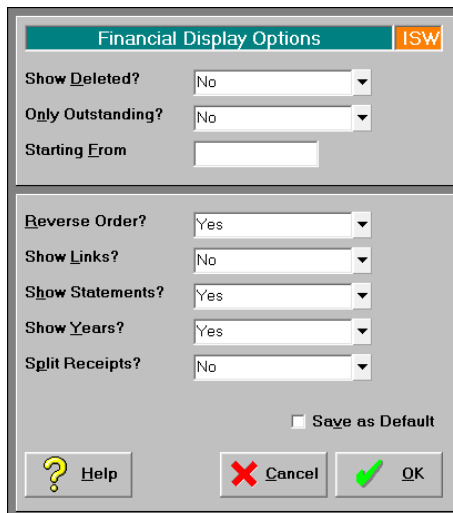
Delay Printing

Delay the printing of an invoice via the 'Accounts Run' option until the specified date.

Rounding

Rounding of the charge can be used to adjust the total up or down.

Display options

Selecting the Display button provides a number of options which will alter the information displayed on the Transactions screen.

Invoicing for Assistants / sub-contractors

Assistants

Invoicing for Assistants, and tracking payment of the receipted amount, is possible, but does require additional configuration. Please talk to Incisive to get this set up correctly.

This option is ideal where you want to present the patient with a single invoice which combines the fees from both the primary surgeon and the assistant.

Electronic invoicing

ACC eForm electronic invoicing

SPM has the option to produce electronic invoice files that can be used with the ACC eForm application. Contact Incisive for further details.

Medicare (HIC) Online

SPM integrates with Medicare Online to send invoices to Medicare and the participating Health Funds, and receives the remittance advice when payment is made. Contact Incisive for further details.

Billing Type options

Claim number required on the invoice

For each Billing Type you are able to have the Claim number, associated with the service charged for, inserted on the invoice. This function is active on Patient Invoices and 3rd Party Invoices.

Go to *Setup* → *Financial* → *Charges* → *Billing Type*

When the invoice is created you will be prompted for the correct Claim number.

The Claim number is inserted below the patient's name.

To add more than one claim number, insert it as 'free-text' in the 'Description' field of the invoice.

Policy details inserted on invoice

For invoices created through a Billing Type, the patient's insurance / health fund policy details can be included on the invoice.

Go to *Setup* → *Financial* → *Charges* → *Billing Type*

Redirect Invoice to Health Fund/Insurance company

This is a **very** specialised option for transactions through a specific Billing Type, such as 'Private – Insured'. This option should only be selected in consultation with Incisive.

This is only to be used where a Health Fund / Insurer (3rd Party) will be paying part of the invoice, but the amount they will pay is not known, and the balance that is not paid will then to be directed to the patient, for them to pay.

Go to *Setup* → *Financial* → *Charges* → *Billing Type*

The Health Fund / Insurer needs to be entered in the Registration form for the patient.

A 'Patient Invoice' will be produced but the invoice will be addressed to the Health Fund / Insurer, instead of the patient. When the amount paid by the Insurer is receipted, the balance still owing is directed to the patient to pay. All statements will always be addressed to the patient.

If the invoice is emailed using Send – F7, it will be sent to the Health Fund / Insurer.

Create the invoice as a 'Patient Invoice'. A prompt will appear indicating the invoice is to be redirected to the Health Fund / Insurer (as entered in *Patient* → *Registration*).
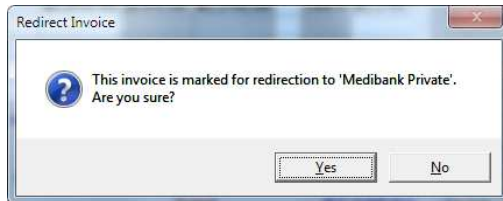
The invoice will appear with an extra 'Sent To:' field included.