Attorney/Employer Direct Invoice ~ TASK: Setup & Workflow

The following setup and workflow allows the user to auto generate an insurance profile for an Employer or Attorney in order to bill for services and sets the patient as not responsible, unlike a traditional insurance. This special workflow sets the Employer/Attorney as both the Guarantor and the default Insurance profile. Either an Invoice type statement can be sent or a HCFA Claim Form.

How do I Setup the Attorney or Employer library for direct billing?

Go to Libraries > **[Employer/Attorneys]**

A. [ADD]

B. Name of company

C. Type ‘ **Billable’** for Direct to Employer or Attorney **>**

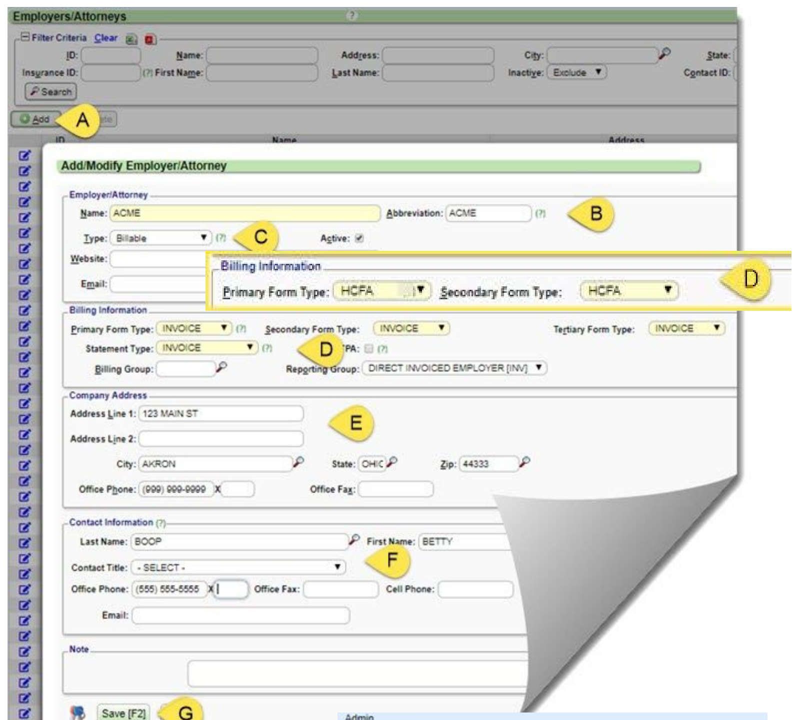
- **Non-Billable**: Employer will be available as an Employer when registering patients, but they will not be billed for services.
- **Policy Holder Only**: Same as above, but Employer will also be available to use as a Policy Holder.
- **Billable**: Use when the Employer/Attorney will be billed directly. Choosing this option will open additional options to manage how this Employer/Attorney will be billed (Invoice/HCFA/etc). The Employer/Attorney will be available as a Guarantor and as a Policy Holder.

D. Billing Information choose Invoice or ' HCFA’ if you prefer to send Paper claims

E. Address

F: Contact * not required

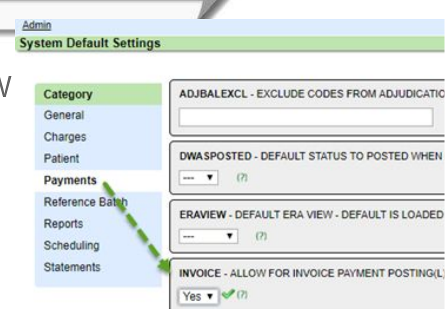
G. [Save]



Setup for Invoice Billing

1. Go to Admin > System Default Setting > Payments > INVOICE - ALLOW FOR INVOICE PAYMENT POSTING > YES
2. If you plan to send Invoices > Go to Admin >

Statement Defaults > Create a 'Statement Default' that incorporates the 'Statement Type': 'INV'. Statement Description can be something that makes sense, such as 'Invoice - Employers'.

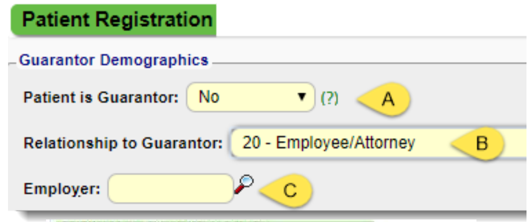


Keep in mind you will likely want to choose a different statement format for Invoices. To do so, you will need to have a test file sent to our Statement Team in order for a proof to be created and sent to you for approval. Please submit a ticket via the Support Portal if you wish to have a different statement format for invoices or let your trainer know

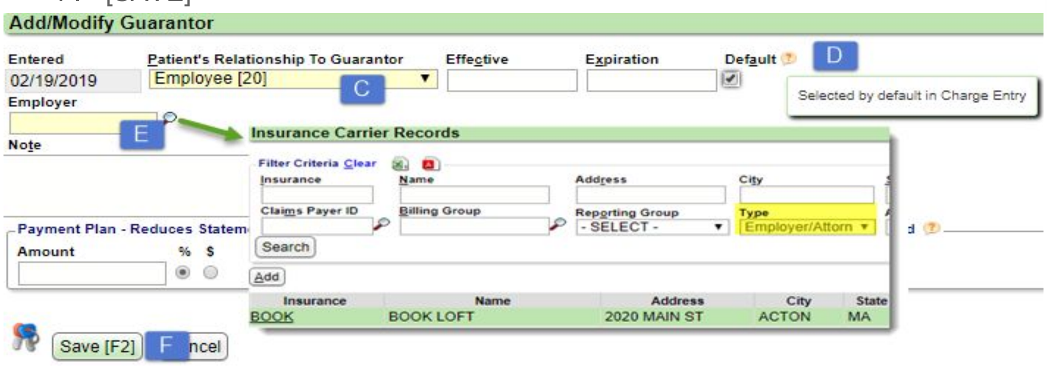
Workflow to Directly Invoice Employer/Attorney

You must first be sure the Guarantor is setup correctly either during registration or on an established patient

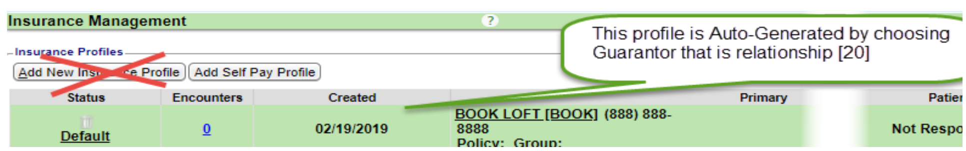
- ***New Patient* Registration: Guarantor Demographics**
    a. Patient is Guarantor > No
    b. Relationship to Guarantor -20
    c. Employer



- ***Current Patient*: Patient Dashboard**
    A. Click hyperlink 'Guarantor'
    B. Guarantor list > [ADD]
    C. Choose 'Patient relationship to Guarantor > **[20]**
    D. Checkbox Default for charge entry
    E. Employer > Relationship [20] search is filtered by Guarantors from the **Employer Library** for Type = *Employer/Attorney*
    F. [SAVE]



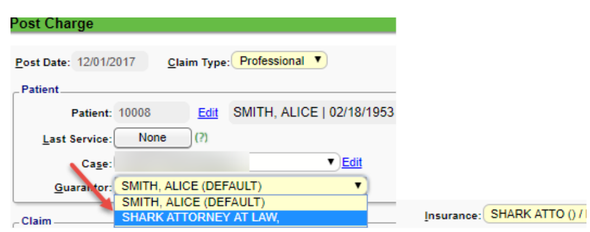
The system *automatically creates a new Default Insurance Management profile for Employer/ Attorney as the Primary policy and the patient NOT responsible* upon saving the above



We display the 'policy holder' as the Patient. We have chosen this option as the patient is employed by this employer. The patient **does not** receive the invoice or printed claim.

Creating a Charge

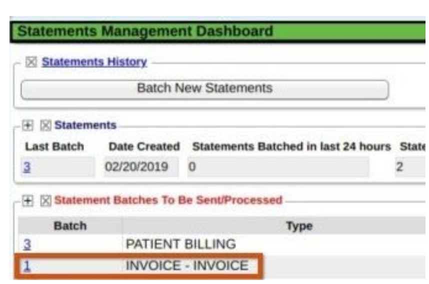
Choose the appropriate Guarantor. We auto populate 'Insurance' with the Attorney/Employer



Batching

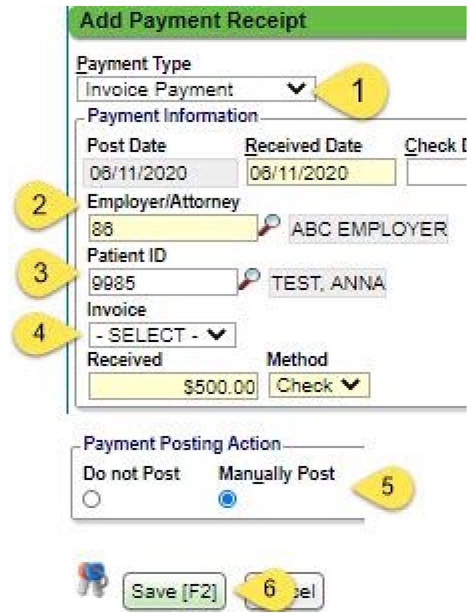
Determined by the form type in the library setup (Invoice or HCFA)

- Invoice: When creating statements, the system creates a separate batch for these Invoices



- Print Claim: When claims batch are created, HCFA's are batched

Payment Posting - Invoice

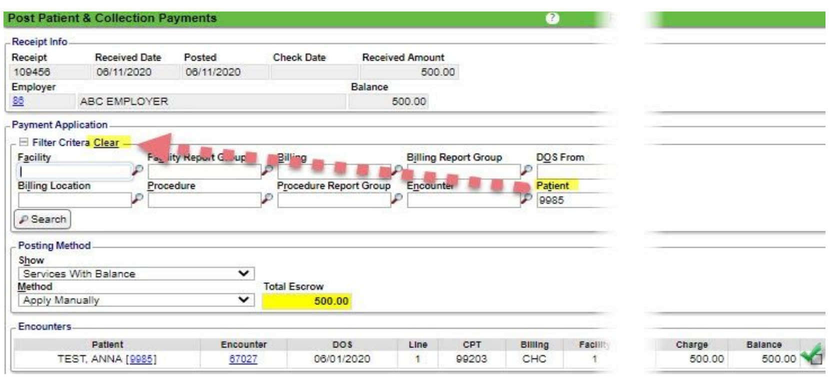


From 'Add Payment Receipt'

1. Choose Invoice Invoice Payment
2. Employer or Attorney
3. If this is for a specific Patient, add them
4. If an Invoice has been sent, choose the Invoice #
5. Choose to Manually Post if the payment amount is in full OR 'Do not Post' to get access to Post Expert Mode to partially post as an VP transaction
6. [SAVE]

Post Patient & Collection Payments paid

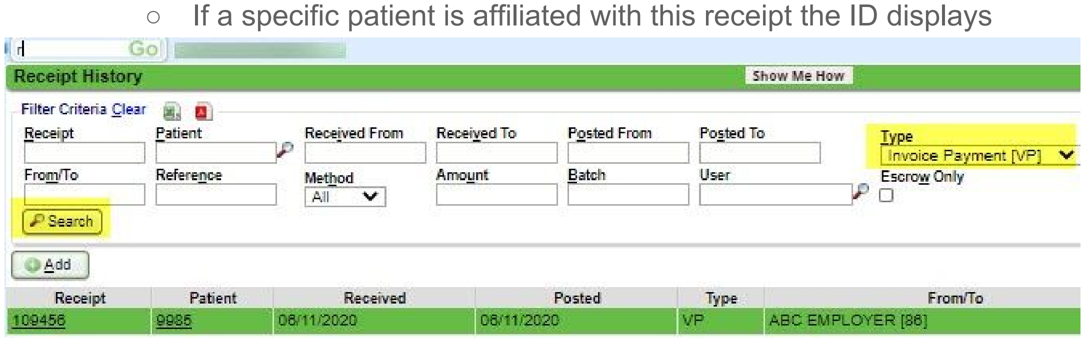
- Check in the box(s) to allocate the payment



  - If the receipt was added with a specific patient we populate the filters. You may clear these filters to allocate to a different patient

Managing

- Receipt History > Use Type Filter > Invoice Payment > Search
  - If a specific patient is affiliated with this receipt the ID displays



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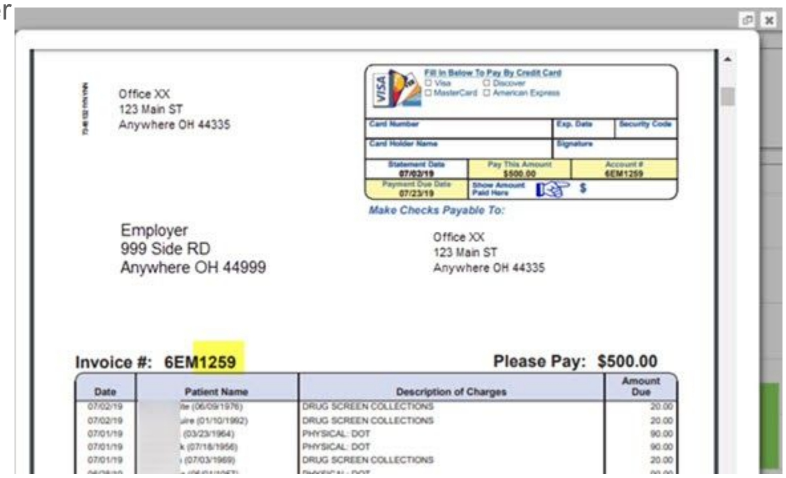
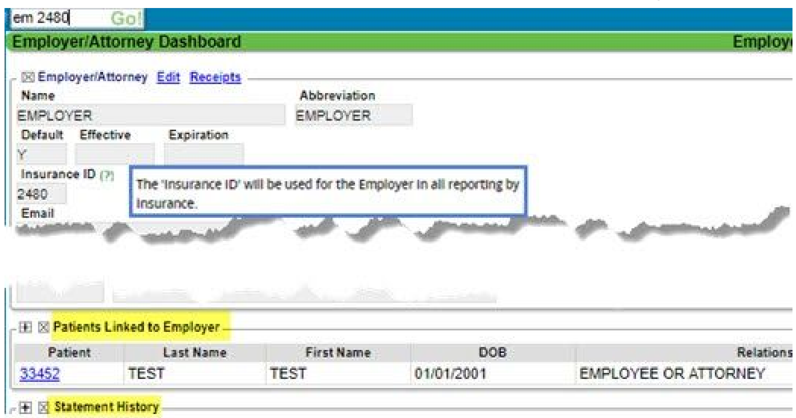
- The Invoice number is the Statement/Invoice Batch + the letters 'EM' + Attorney/Employer ID - if this claim was sent HCFA no Invoice number appears
    - Example: Statement batch # 6, Employer # EM1259



Go-box short-cuts:

- STB > Statement/Invoice * our example STB 6
- EM > Employer/ Attorney Dashboard * our example EM 2480

View all the employees and current balances > Patient Linked to Employer



'Statement History' section displays all batches, all Encounters in each batch. 'View' link to Invoice

To work A/R > Interactive Aging (IA from the go box) or Aging by Patient Report - use filters for statement type Invoice or setup reporting group on the Employer Library and filter by reporting group