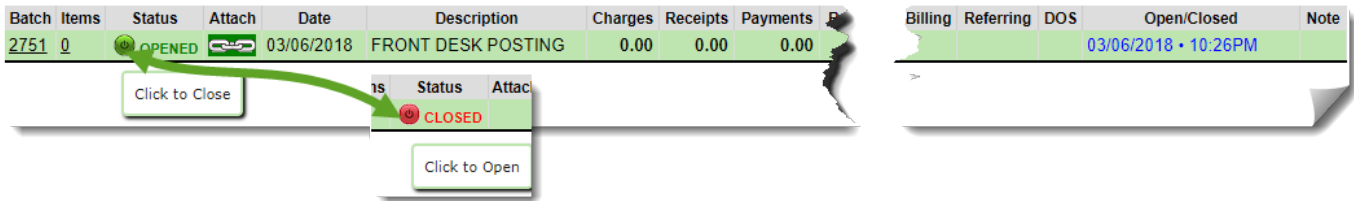# Open, Close, Attach, Detach Reference Batch

Depending on the user's permissions they may see just their Batch or all Batches

- A Reference Batch remains 'Opened' until the user clicks the Status button to Close

- Chain icon displays 'linked' with green highlight to indicate you are attached to this batch
- Chain displays 'unlinked' (no highlight) if the Batch is Open but you are not attached to it
- Chain disappears when the batch is closed
 - These buttons are also available from 'Batch Details'
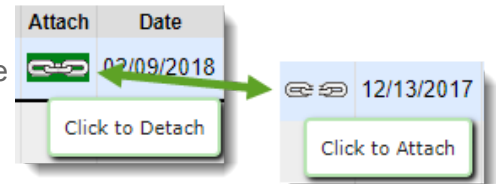
How to review a Reference Batch

- To review items in your *current* Batch, go to the Reference Details page where all batch items are listed, by clicking on the reference batch <u>number</u> at the top right of the screen

- To review *any* Reference Batch, click the 'Reference Batch' link

  1. Use filters to find the batch to review
  2. Click the Items **number** link
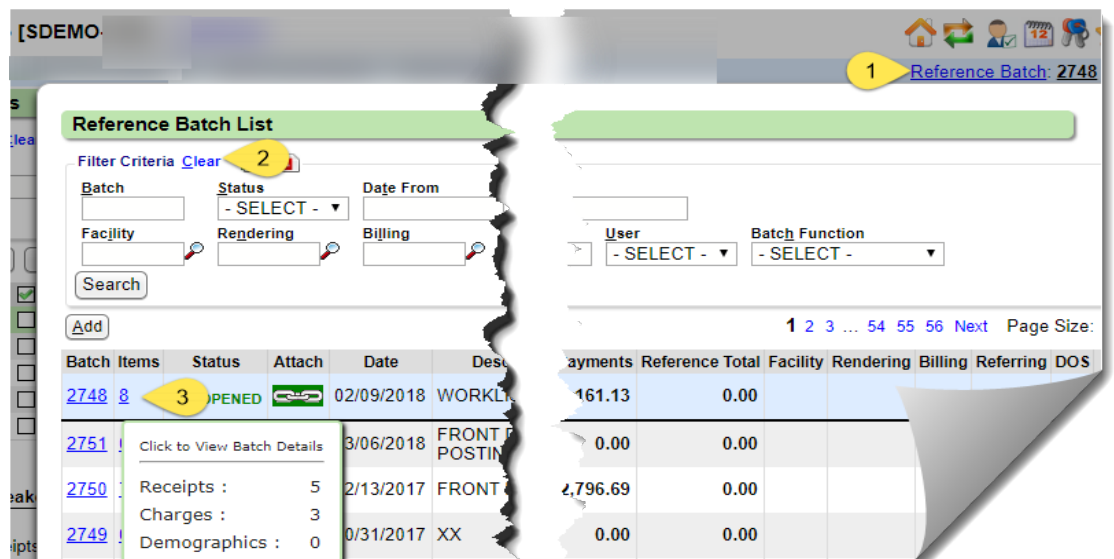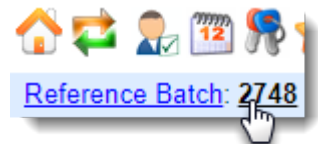
Reference Batch Details

1. [Report] creates a PDF of the details of Receipts or Charges
2. Use Radio buttons to toggle view of Receipts, Charges or Demographics in this batch

3. Use Filters to search for specific items in the batch

- **Receipts**
  - If Receipts exist in a batch, the Receipt Breakdown will be the default view
  - All Receipts listed with subtotals by Cash/Check/Card/EFT/Refunds by

Patient or Insurance

From within the Reference batch > Click to Close

From the 'Reference Batch List' page
1. Click 'Reference Batch' link
2. Click green Status icon to Close