Open, Close, Attach, Detach Reference Batch

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

	• /	۹ Refe	erence	Batch remains 'C	peneo	d' unti	l the us	er click	s th	ne Stat	tus k	outton to C	lose	
Batch Items	Status	Attach	Date	Description	Charges	Receipts	Payments	😹 🛛 Bi	illing	Referring	DOS	Open/Clos	sed	Note
<u>2751</u> 0			03/06/2018	FRONT DESK POSTING	0.00	0.00	0.00					03/06/2018 • 10:2	26PM	
_	Click to C	llose		Is Status Attac CLOSED Click to Open					-					
 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' 														
	Batch	Deta	ils	Batch: 2817	FD CHE	CK IN/O	υт 🗹	Status	s: (OPE	INE	D		

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 '<u>Reference Batch</u>' link
 - 1. Use filters to find the batch to review
 - 2. Click the Items **number** link

_			_		7					eference Batch: 21
		Batch Lis	-			- 2 <u>1</u>				
Fi	ter Criteria	<u>C</u> lear	<u>`</u>							
B	atch	Status	LECT -	Date From	m 🔤					
E	acility	Rende		Billing		Use		tch Func	ion	
	ic <u>i</u> nty				- P .			SELECT		•
S	earch				— ¶.					
Ad	d					3		123	54 55	56 Next Page Si
Bat	ch Items	Status	Attach	Date	Dest	ayments	Reference Total	Facility F	lendering E	Billing Referring DO
274	8 8 🧹	3 PENED	<u>~</u> _	02/09/2018	WORKLIN	161.13	0.00			
				-	FRONT P	-				
275	1 ! Click	to View Batc	h Details	3/06/2018	POSTIN	0.00	0.00			
275	n Rece	eipts :	5	2/13/2017	FRONT	₹,796.69	0.00			
				2/13/2017		2,130.03	0.00			
2/3	Cha	race '	3							

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

Reference Method	Amount
	Anount
Reference Batch Details:	1
	Reference Batch Details: 2 Receipts • Charges •

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

Receipt Received 109218 01/31/2018 1/201/2019 01/21/2019				Reference	e Batch Details Receipts
Batch 2750 Breakdown		Patient Recei	pts	Insurance Re	eceipts
Receipts 🤨	3.524.99	Cash:	575.00	Check:	45.00
Disbursed Receipts	450.00	Check:	0.00	EFT:	2,904.99
	2.796.69	Card:	0.00	Card:	0.00
Payments 🥬		Refunds:	0.00	Refunds:	0.00
Payments Applied Outside of this Batch 🥬	0.00	Total:	575.00	Total:	2.949.99
Escrow 🥬	278.30	Total.	515.00	Total.	2,040.00
Payments from Receipts Outside of this Batch	0.00				
Patient or Insurance	9				

From within the Reference batch > Click to Close

Batch: 2817 FD CHECK IN/OUT C Status:	OPENED	<u>~</u>
@CLOSED	Click to Close	l

From the 'Reference Batch List' page

- 1. Click 'Reference Batch' link
- 2. Click green Status icon to Close

