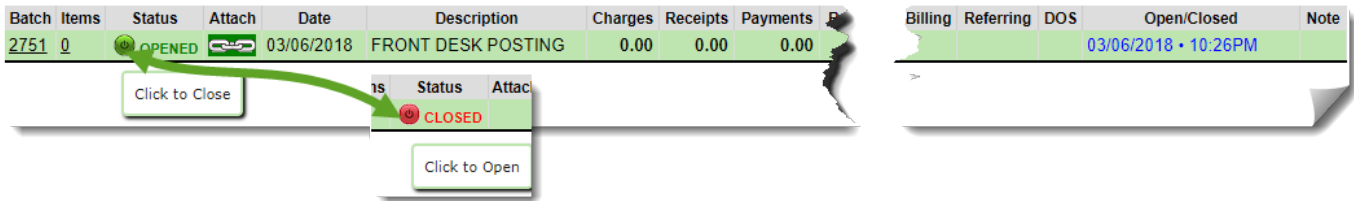


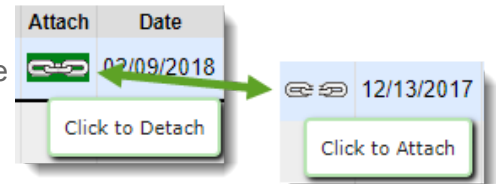
## Open, Close, Attach, Detach Reference Batch

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'

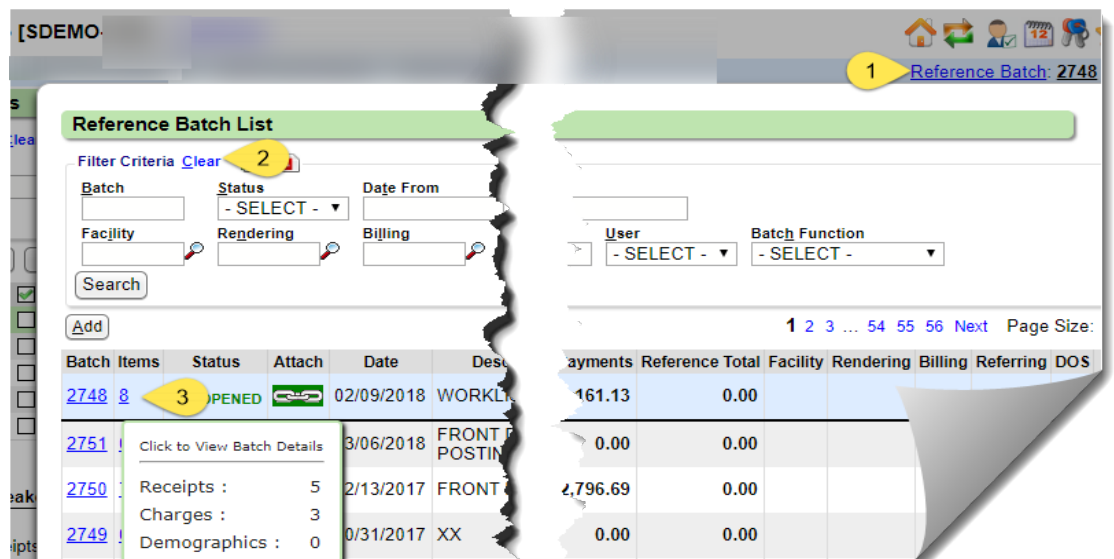
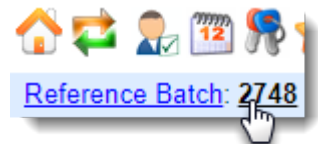


### Batch Details

Batch: 2817 FD CHECK IN/OUT Status: **OPENED**

## 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 number 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

**Batch Details** Batch ID: 2748 Details: Status: OPENED

Filter Criteria [Clear](#)

Receipt	Received/Date	Posted/Date	Type	From/To	Reference	Method	Amount
3			All			All	

Search

1 Report Select All Change Batch

Reference Batch Details: 2 Receipts Charges Demographics

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
09218	01/31/2018

Batch 2750 Breakdown	
Receipts	3,524.99
Disbursed Receipts	450.00
Payments	2,796.69
Payments Applied Outside of this Batch	0.00
Escrow	278.30
Payments from Receipts Outside of this Batch	0.00

Patient Receipts	
Cash:	575.00
Check:	0.00
Card:	0.00
Refunds:	0.00
<b>Total:</b>	<b>575.00</b>

Insurance Receipts	
Check:	45.00
EFT:	2,904.99
Card:	0.00
Refunds:	0.00
<b>Total:</b>	<b>2,949.99</b>

From within the Reference batch > Click to Close

**Batch: 2817** FD CHECK IN/OUT Status: **OPENED**

**CLOSED** Click to Close

From the 'Reference Batch List' page

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

1 Reference Batch:

**Batch Details**

**Reference Batch List**

Filter Criteria [Clear](#)

Batch	Status
	- SELE

Facility  Search

Search

Add

Batch	Items	Status
2751	0	<b>CLOSED</b>

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