Batch and Upload Statements Manually

Job Scheduler > Batch Statements

Review Statement Batch Items and Remove Individual Statements

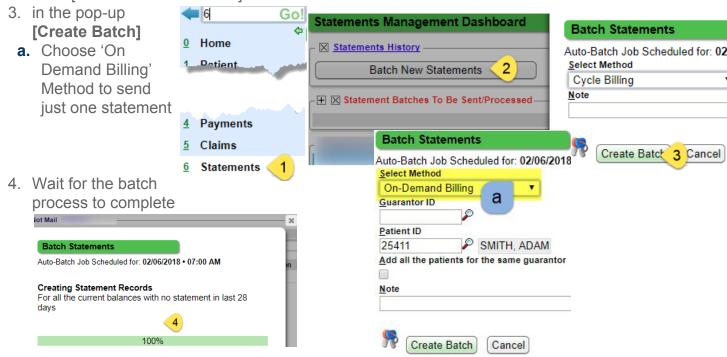
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How do I delete a Statement Batch?

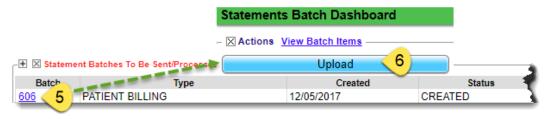
Statements can be batched and sent at any time and as often as desired. We recommend statements be reviewed for accuracy before uploading.

Batch and Upload Statements Manually

- 1. Click 'Statements' in the left menu or enter '6' in the 'Go' box
- 2. Click [Batch New Statements]



5. Click the Batch ID in the 'Statements Batches To Be Sent/Processed' section



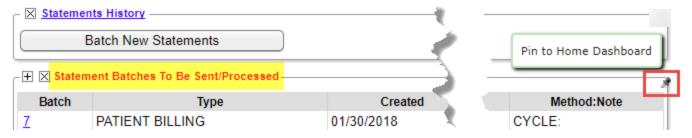
6. in the pop-up, Click [Upload] *This popup can be closed at any time. The upload will continue in the background until complete."

We recommend using the Job Scheduler to regularly gather statements for review and upload.

Job Scheduler > Batch Statements

- 1. Go to Admin > Job Scheduler
- 2. Click [Add] > Select 'Batch Statements'
- 3. Un-check 'Upload after Batching' to review the statements before they are uploaded
- 4. Pattern choose at least once a week, before Noon Eastern
 - We do not recommend sending on Fridays as statements are not processed over the weekend
- 5. Range: choose 'No End Date'
- 6. Save

Pin the 'Statement Batches To Be Sent/Processed' section to the Home Dashboard of the person(s) who will be reviewing.



If you do not have time to review the statement batch within the day, delete the batch so it may be regathered with the most recent payments and amount due.

- 1. Go to ADMIN > [Delete Statement Batch]
- 2. Choose the batch number > SAVE

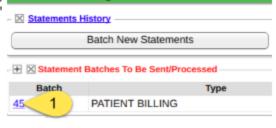


Review Statement Batch Items and Remove Individual Statements

We recommend a review of statements *prior* to uploading Statements Management Dashboard

- 1. Click Batch # on the 'Statements Batch Dashboard' Statements History
- 2. Click 'View Batch Items'





3. Use the filters to view 'Unapplied'

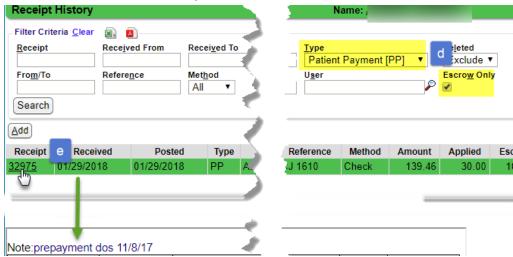


View all Escrow and apply it to the account where appropriate



- b. Hold down the Ctrl key and click on the Patient ID this will open a new tab
- c. On the Patient Dashboard, look to the Balance Section, take note of the DOS and Click on the Receipts link
- d. Filters for patient payment, Escrow only
- e. Highlight the Receipt, read the note, if applicable > click the Receipt to post
 - Close the tab you are working in and return to the list to work any additional Escrow





 Use Click to Sort feature to review high insurance or patient due items. Filter criteria is available for Patients, Guarantors, and Encounters



To remove statements from the batch

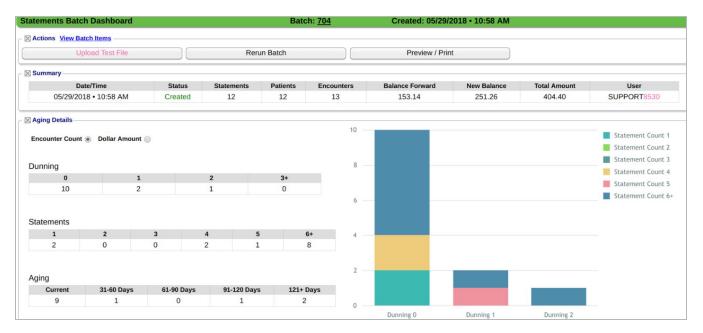
- 1. Check box(s) to select the statement
- 2. Click [Remove Selected Statements]
- 3. Click OK

These items will be re-queued in the next statement batch. No dunning or statement counts are affected.



The Statement Batch Dashboard provides table and graphical

breakdowns of the counts and dollar value of the statements in the batch.



How do I delete a Statement Batch?

If you do not have time to review the statement batch within the day, delete the batch so it may be regathered with the most recent payments and amount due. You may not delete a batch that has already been uploaded.

- 1. Go to ADMIN > [Delete Statement Batch]
- 2. Choose the batch number > SAVE

