

CATEGORY: STATEMENT BATCH CREATION, REVIEW, UPLOAD

Batch and Upload Statements Manually

1

Job Scheduler > Batch Statements

2

Review Statement Batch Items and Remove Individual Statements

2

How do I delete a Statement Batch?

4

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]
3. in the pop-up

[Create Batch]

- a. Choose 'On Demand Billing' Method to send just one statement

Statements Management Dashboard

Batch New Statements

Batch Statements

Auto-Batch Job Scheduled for: 02/06/2018

Select Method: On-Demand Billing

Guarantor ID

Patient ID: 25411 SMITH, ADAM

Add all the patients for the same guarantor

Note

Create Batch

Create Batch

Cancel

100%

4. Wait for the batch process to complete

Batch Statements

Auto-Batch Job Scheduled for: 02/06/2018 • 07:00 AM

Creating Statement Records

For all the current balances with no statement in last 28 days

100%

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

Statements Batch Dashboard

Upload

Batch	Type	Created	Status
606	PATIENT BILLING	12/05/2017	CREATED

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.

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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.

The screenshot shows two side-by-side panels. The left panel is titled 'Statements History' and contains a 'Batch New Statements' button. Below it is a section titled 'Statement Batches To Be Sent/Processed' with a yellow highlight. This section contains a table with the following data:

Batch	Type	Created
7	PATIENT BILLING	01/30/2018

The right panel shows a 'Pin to Home Dashboard' button with a red box around its pin icon.

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

The screenshot shows the 'Admin' menu with 'Admin Functions' expanded. A 'Delete Statement Batch' button is highlighted with a blue circle and the number '1'. A modal dialog box titled 'Delete Statement Batch' is open, showing a 'Statement Batch ID' field with the value '7' and a search icon. The 'Save [F2]' button is highlighted with a blue circle and the number '2'. There is also a 'Cancel' button.

Review Statement Batch Items and Remove Individual Statements

We recommend a review of statements *prior* to uploading

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

The screenshot shows the 'Statements Batch Dashboard' with a green header. Under the 'Actions' section, the 'View Batch Items' button is highlighted with a yellow circle and the number '2'. There is also an 'Upload' button.

The screenshot shows the 'Statements Management Dashboard' with a green header. It contains a 'Batch New Statements' button and a section titled 'Statement Batches To Be Sent/Processed' with a yellow highlight. This section contains a table with the following data:

Batch	Type
45	PATIENT BILLING

The 'Batch' cell containing '45' is highlighted with a yellow circle and the number '1'.

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3. Use the filters to view 'Unapplied'

a. View all Escrow and apply it to the account where appropriate

Guarantor	Patient	Name	Encounter	Ins Due	Pat Due	Unapplied
50836	<input type="checkbox"/> 191791		16321	0.00	30.00	109.46
59456	<input type="checkbox"/> 202198		18485 + 2	3481.00	13.55	27.21
59520	<input type="checkbox"/> 202258		11425 + 1	0.00	61.27	25.00
58423	<input type="checkbox"/> 201350		19440	0.00	28.20	7.00

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

Encounter	DOS	Lines	Insurance
16321	11/08/2017	1	UNITED HEA [UHC]
9862	09/13/2017	3	UNITED HEA [UHC]

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

Receipt	Received	Posted	Type
32975	01/29/2018	01/29/2018	PP

Reference	Method	Amount	Applied	Esc
J 1610	Check	139.46	30.00	1

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

Ins Due	Due
39	50
17191.00	390.73
14278.00	240.00
10831.14	59.00

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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.

Statements Batch Dashboard Batch: 704 Created: 05/29/2018 • 10:58 AM

Actions: [View Batch Items](#)

Buttons: [Upload Test File](#) [Rerun Batch](#) [Preview / Print](#)

Summary

Date/Time	Status	Statements	Patients	Encounters	Balance Forward	New Balance	Total Amount	User
05/29/2018 • 10:58 AM	Created	12	12	13	153.14	251.26	404.40	SUPPORT8530

Aging Details

Encounter Count Dollar Amount

Dunning

0	1	2	3+
10	2	1	0

Statements

1	2	3	4	5	6+
2	0	0	2	1	8

Aging

Current	31-60 Days	61-90 Days	91-120 Days	121+ Days
9	1	0	1	2

Bar Chart Data:

Dunning Level	Statement Count 1	Statement Count 2	Statement Count 3	Statement Count 4	Statement Count 5	Statement Count 6+
Dunning 0	2	0	0	2	0	8
Dunning 1	0	0	0	0	1	1
Dunning 2	0	0	0	0	0	1

How do I delete a Statement Batch?

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1. Go to ADMIN > [Delete Statement Batch]
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