

Batching invoices and receipts

Last Modified on 03/06/2024 9:40 am AEST

The batch feature allows suppressed invoices to be batched together for 3rd party payers like the TAC and is commonly used in hospitals. The feature can create a batch statement and receipt a batch of invoices when payment from a 3rd party is received.

Create a 3rd party batch

Batch together suppressed invoices and create a statement that can be used for billing a 3rd party payer.

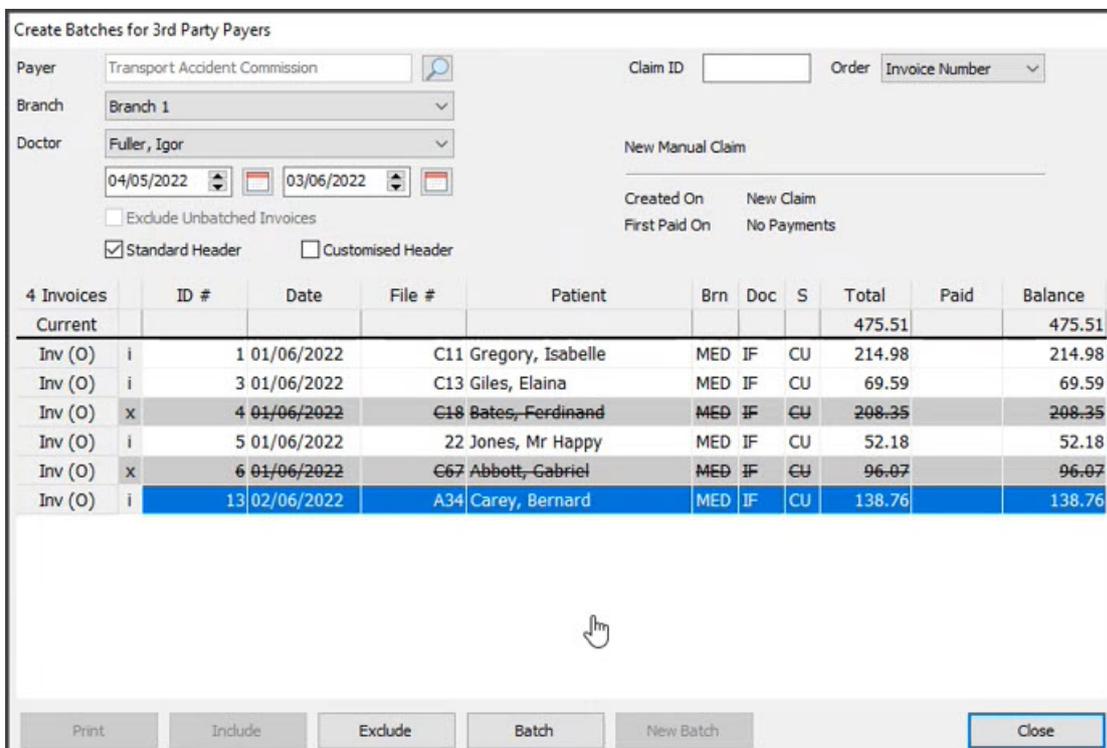
To create a batch:

1. Select Zedmed's **Management Tab**.
2. Select **3rd Party Batch > Select Create Batches for 3rd Party Payers**.

The **Create Batches for 3rd Party Payers** screen will open.

3. Select the search icon on the **Payer** field.
4. Use the **Find Account Payer** pop-up to enter the name of the payer and select **Find**.
5. Select the payer from the list.
6. Select the **Branch**.
7. In the **Doctor** field, select **ALL** or a specific doctor.

The invoices for the selected criteria will appear, and these invoices can be batched together.



4 Invoices	ID #	Date	File #	Patient	Brn	Doc	S	Total	Paid	Balance
Current								475.51		475.51
Inv (O)	i	1 01/06/2022		C11 Gregory, Isabelle	MED	IF	CU	214.98		214.98
Inv (O)	i	3 01/06/2022		C13 Giles, Elaina	MED	IF	CU	69.59		69.59
Inv (O)	x	4 01/06/2022		C18 Bates, Ferdinand	MED	IF	CU	208.35		208.35
Inv (O)	i	5 01/06/2022		22 Jones, Mr Happy	MED	IF	CU	52.18		52.18
Inv (O)	x	6 01/06/2022		C67 Abbott, Gabriel	MED	IF	CU	96.07		96.07
Inv (O)	i	13 02/06/2022	A34	Carey, Bernard	MED	IF	CU	138.76		138.76

8. Select the invoices to be included in the batch.

- Use the **Exclude** button to exclude an invoice from the batch.
- Use the **Include** button to add back an excluded invoice.

Excluded invoices will be grey with a line through them.

- If a doctor has their own header, and all invoices are for the same doctor, use **Customised Header**.
- Enter a claim number into the **Claim ID** field.

This is a text field for the practice's own numbering system.

- Select **Batch**.
- The printer screen will open and you can print out the statement or select PDF to save a local copy.

The statement includes a TO field for the payer, the total for each invoice and the total value of all invoices in the batch.

The **New Batch** button is used to create another batch from the remaining unbatched invoices.

Receipt a 3rd party batch

Manually receipt a batch of invoices when payment is received by a third-party payer.

To receipt a batch:

- Select Zedmed's **Management Tab**.
- Select **3rd Party Batch**.
- Select **Batch Enquiry for 3rd Party Payers**.

The **Batch Enquiry for 3rd Party Payers** screen will open.

- Select the search icon on the **Payer** field.
- Use the **Find Account Payer** pop-up to enter the name of the payer and select **Find**.
- Select the payer from the list.
- Select the **Branch**.
- In the doctor field, select **ALL** or a specific doctor.

The batches for the selected criteria will be displayed.

Status	Claim #	Type	Date	Transmission	Pay Date	Br	Dr	Total Value	Outstanding	Deposit
<input checked="" type="checkbox"/>	56465	MAN	3/06/2022			MED	IF	356.60	356.60	0.00
<input type="checkbox"/>	345FA	MAN	3/06/2022			MED	IF	284.57	284.57	0.00

Before receipting, the batch's total must match the payment received.

- Make any required adjustments by selecting the batch then **Details/Adjustment**.

Use Bad Debt, Discount, Increase or Void to adjust or remove items. Adjustments take effect when you select **Close**.

Batch Enquiry for 3rd Party Payers

Payer: Transport Accident Commission
Branch: Branch 1
Doctor: Fuller, Igor
04/05/2022 03/06/2022

Batches: Outstanding MANUAL
Selected Batch(es): 0
Selected Batch Total: 0.00
Clear Selection

Status	Claim #	Type	Date	Transmission	Pay Date	Br	Dr	Total Value	Outstanding	Deposit
<input type="checkbox"/>	345FA	MAN	3/06/2022			MED	IF	284.57	284.57	0.00

Information

 Receipt allocation to batch(es) has been successful!

OK

Detail/Adjustment ... Include/Exclude Receipt Payments Print Close