

## Batching invoices and receipts

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

The batch feature allows suppressed invoices to be batched together <u>for 3rd party payers</u> 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.

Create Batch	nes for	3rd Party Pay	ers								
Payer	Transp	ort Accident C	Commission	$\bigcirc$		Claim ID			Order Invoi	ce Number	~
Branch	Branch	11		~							
Doctor	Fuller,	Igor		~		New Manual Cla	im				
	04/05/	2022 🖨	03/06/2022	:		Created On	Mauri	Claim			
	Exd	ude Unbatche	d Invoices			First Paid On	No P	ayment	ts		
	Star	ndard Header	Custo	mised Header							
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	<del>C18</del>	Bates, Ferdinand	MEC	₽	<del>CU</del>	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	<del>C67</del>	Abbott, Gabriel	MED	Ŧ	€₩	<del>96.07</del>		96.07
Inv (O)	i	13	02/06/2022	A34	Carey, Bernard	MED	IF	CU	138.76		138.76
Inv (O)	1	13	02/06/2022	A34	Carey, Bernard	MEC	IF	CU	138.76		138
Dent		Tender				New Date					dee

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.

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

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

- 11. Select Batch.
- 12. 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:

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

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

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

The batches for the selected criteria will be displayed.

Batch En	quiry for 3rd Pa	rty Payers									2
Payer	Transport Accide	ent Commissio	n	Q		Batches	Outsta	nding MANual		~	
Branch	Branch 1			~		Selected	Batch(e	s)		0	
Doctor	Fuller, Igor			~		Selected	Batch T	otal		0.00	
	04/05/2022		03/06/2022	]		Clear	r Selectio	n			
Stat	tus Claim #	Туре	Date	Transmission	Pay Date	Br	Dr	Total Value	Outstanding	Deposit	
	56465	MAN	3/06/2022			MED	IF	356.60	356.60	)	0.00
3	345FA	MAN	3/06/2022			MED	IF	284.57	284.57		0.00

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

9. 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.** 

Use Include/Exclude to add and remove invoices from the batch.

Batch A Payer	djustment Transport Accider	nt Commission		Batch Total	336.75	Batch Outstandin	g		336.75 O Inv	roice Only	
Invoid	e	Date	Description				Tx	Stf	Value	Outstanding	
- I - I - I - I	S S S	01/06/2022 01/06/2022 01/06/2022 01/06/2022 01/06/2022 01/06/2022	JONES, 23 Leve GILES, 105 Pro GREGORY 110 Pro	HAPPY 1 B Surger ELAINA fessional , ISABELLE fessional	y Consultat attendance attendance	45FAD ion 45FAD by a spe 45FAD at consu	MED MED MED	IF PD IF PD IF PD	52.18 52.18 69.59 69.59 214.98 214.98	52.18 52.18 69.59 69.59 214.98 214.98	
Select Invoice	MA Same Da	iy Delete	Select Service	Change Anal	ysis Group	В	ad Deb	ot	Discount	ase Void	Remove Void
	Branch 1		PDAVIS							Close	Cancel

- 10. When the batch total is the same as the payment received, tick the batch you want to receipt.
- 11. Select Receipt.

The **Batch Receipt** screen will open, and default to the value of the batch.

The amount shown must be the same value as the batch before you can receipt it.

		1550.05 Deleli	red 0.00 Credits	0.00		
Name	Bank	Branch	Number	Banklist Am	ount	
		~		BNK 🗸	356.61	
2. Cheque	3. MC Cheque	Tyro Eftpos			5	Add Chang
5. Eftpos	6. Direct Deposit	Z. Credits	Tyro EasyClaim			
			Pi	ayment Total	356.61	
			A	mount Due	356.60	
	Name 2. Cheque 5. Eftpos	Name Bank 2. Cheque <u>3.</u> MC Cheque 5. Eftpos <u>6</u> . Direct Deposit	Name Bank Branch	Name         Bank         Branch         Number           2. Cheque         3. MC Cheque         Tyro Eftpos         5. Eftpos         6. Direct Deposit         Z. Credits         Tyro EasyClaim	Name     Bank     Branch     Number     Banklist     Amm       2. Cheque     3. MC Cheque     Tyro Eftpos     BNK     Image: Cheque     BNK     Image: Cheque     Image: Ch	Name     Bank     Branch     Number     Banklist     Amount       2. Cheque     3. MC Cheque     Tyro Eftpos     Image: Credits     Tyro EasyClaim       5. Eftpos     6. Direct Deposit     Z. Credits     Tyro EasyClaim

- 12. Select Add.
- 13. Select Allocate.

A confirmation message will appear, and a prompt will allow you to print out a receipt.

If you want to see a batch after it has been receipted, select Paid from the Batches field.

A paid batch will have a green tick and the **Outstanding** field will show \$0.

Payer	Transport Accident	Commis	sion	Q		Batches	Outsta	nding MANual		~	
Branch	Branch 1			~		Selected	Batch(e	s)		0	
Ooctor	Fuller, Igor			~		Selected	Batch T	otal		0.00	
	04/05/2022		03/06/2022			Clear	Selection	on			
] Staf	tus Claim #	Туре	Date	Transmission	Pay Date	Br	Dr	Total Value	Outstanding	Deposit	
	345FA	MAN	3/06/2022			MED	IF	284.5	7 284.5		0.00
			Informat	tion				×			
			Informat	tion Receipt allocatior	n to batch(es)	has been	n succe	X ssful!			
			Informat	tion Receipt allocation	n to batch(es)	has been	n succes	X ssful! OK			