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BILLING MODULE 2011 – HEALTH one Version 7.1

We have developed a completely new billing module for versions 7.x. You will be able to continue using the old billing module in version 7.x if you wish but we strongly encourage you to convert your old bills –see pages 6-7 "conversion from old billing.

The biggest changes in the new module are:

a) The bills (now called invoices) are saved in the patient file (HCR). Thus if you rebuild the patient indexes, you get all the bills back – if for example your database became corrupt
b) All payments are made against specific invoices –easier to track costs and payments
c) Billing and payments can be done directly from appointments screen – no need for secretary to open the HCR
d) Very easy and comprehensive analysis by patient and by family and by third party
e) Simple reporting on daily analysis – open bills – breakdown by doctor, by company etc.

1.1. Bills creation.

There are several possibilities to create a bill:

- From the patient file, a button + shortcut Shift+F9 ➔ *display the billing item editor*
- Insert the item from the item selector (new item = invoice) ➔ *display the billing item editor*
- Directly from the billing tab in the patient file.

Other possibilities (*without opening the patient file*) : List of invoices Shift+F9

- from the patient Right click – New invoice.
- from appointment screen - Right click + button ➔ New invoice.

=> from patient and appt => this displays the billing tab with all open bills for the patient
Today's bill is selected by default.

Two buttons on the billing tab:

- New invoice (*display the billing item editor*),
- New payment (*displays the payment editor*).

If there are no open bills – the new payment button is disabled.

1.2. New invoice

- The Billing searches for a transaction for the responsible doctor and the transaction date.
  The choice is displayed at the bottom of the dialog.
- Two options:
  - Create the invoice in existing transaction of today's date
    If the existing transaction does not exist, the choice is disabled.
  - Create in new transaction
    - name = billing
    - responsible is responsible of billing
    - author : logged in user

(We have an option to default to new transaction). Any new transaction has a specific transaction name = "invoicing"

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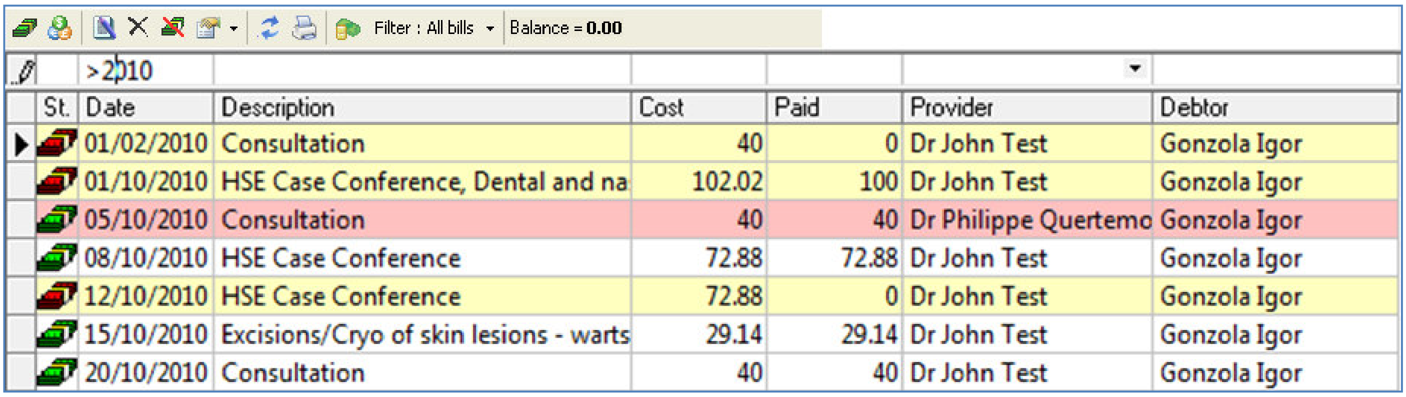
1.3. Billing tab filter and display.

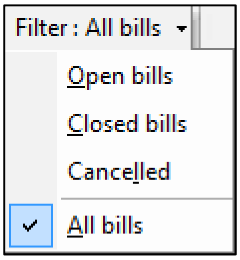
The list of bills contains several columns:



St.	Date	Description	Cost	Paid	Provider	Debtor
	01/02/2010	Consultation	40	0	Dr John Test	Gonzola Igor
	01/10/2010	HSE Case Conference, Dental and na	102.02	100	Dr John Test	Gonzola Igor
	05/10/2010	Consultation	40	40	Dr Philippe Quertemo	Gonzola Igor
	08/10/2010	HSE Case Conference	72.88	72.88	Dr John Test	Gonzola Igor
	12/10/2010	HSE Case Conference	72.88	0	Dr John Test	Gonzola Igor
	15/10/2010	Excisions/Cryo of skin lesions - warts	29.14	29.14	Dr John Test	Gonzola Igor
	20/10/2010	Consultation	40	40	Dr John Test	Gonzola Igor

1.3.1. Filter

- Displays open bills or all bills (A specific drop down menu filter allows us to filter the bills on several criteria: open, closed, cancelled or all bills.



- Several filters are available by column (*above the main grid*):
  - Filter by date (period of time are allowed (<01/10/2010, <2010, >06/2010, >2009 <2010, …)
  - Description
  - Cost & Paid *(expressions like >100, <10 are allowed)*
  - Filter by responsible. (List of users available in a drop down filter).
  - Debtor filter.

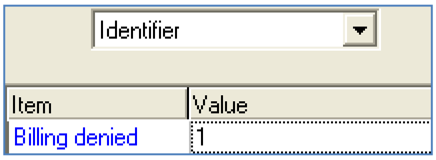
1.3.2. Display

- Open bills are highlighted in yellow
- Bills belonging to doctors other than the logged on user are displayed in red.

1.4. Billing item editor.

a. Date – initialized with the transaction date but can be modified.

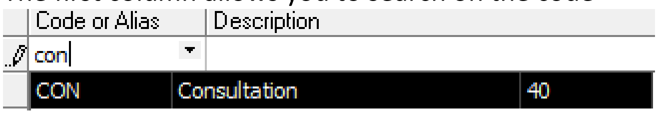
b. Responsible (combo that contains all users).
We have a tag in the userdb to exclude any user from the list:
(Highlight the user name – information tab – identifier view – billing denied (4th from bottom in the list) = 1.)
Initialized with the logged in user provided it is in the list. (otherwise remains blank and warning if not filled in)



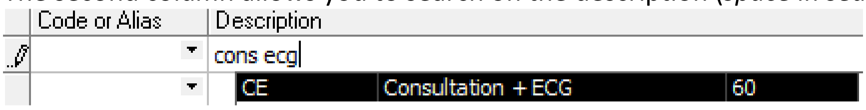
c. If initiated from the appts, the responsible will be the GP with whom the appt is made.

d. Invoice editor has three parts
"invoiced" input the invoice (bill) here. We have a grid with 3 columns "Code or Alias" | "Description" | "Price"
We have a selector from an external database. Costs are searched directly from the grid.

- The first column allows you to search on the code



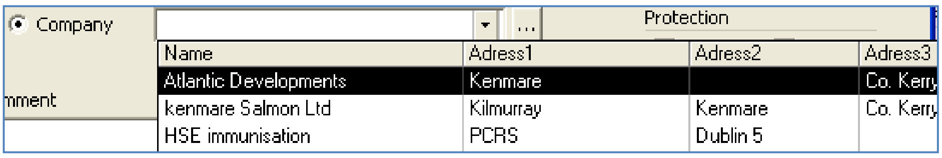
- The second column allows you to search on the description (*space in search criteria allowed*).



The doctor can change the list of billing items or debtors in the config.
The cost is freely modifiable – the doctor should be able to ask the price he wants.
Several costs can be added in the grid. The total is calculated automatically.
A full description of the invoice is generated and modifiable (this is the caption that will be put on the bills, printing etc.)
e.g. Consultation + ECG

e. A comment in free text

f. Debtor : 3 possibilities. This is initialized with last invoice for this patient in the HCR.
  a. Patient (default if no previous bills except for child <18 ➔ family.)
  b. Family : query with the family number to initialize a combo. We have a button to select a family headfrom the "mini" patient selector.
  NB: An asterix after the family number denotes family head
  c. Company : List initialized from an external database. (*CompanyName, Adress1, Adress2, Adress3, ContactPerson)*.

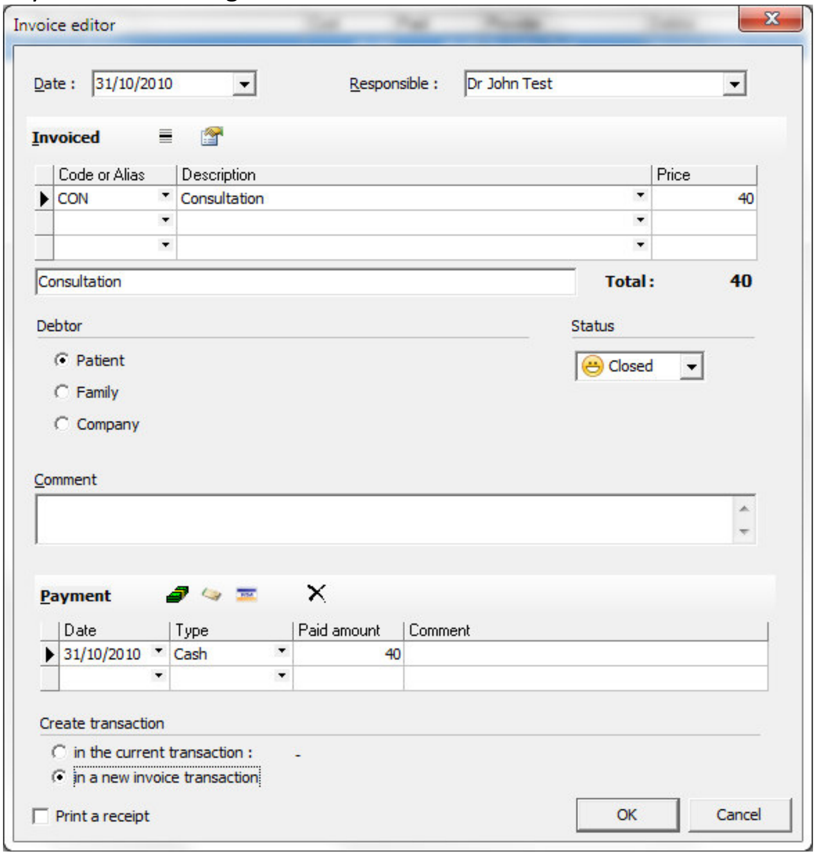


g. Payments : List of payment (grid) – Amount paid, payment type (cash, cheque, credit card, other…), comment.
To mark a bill as paid directly, we have buttons - cash, cheque, credit card to initialize the payment with the total cost.
Status – closed bill. This is editable.
Receipt – a check box is added to print a receipt when you validate the dialog.

Notes:

- *only one debtor is possible for one invoice - If multiple create multiple bills.*
- *the address of the debtor (company) is saved in the database to be able to print.*

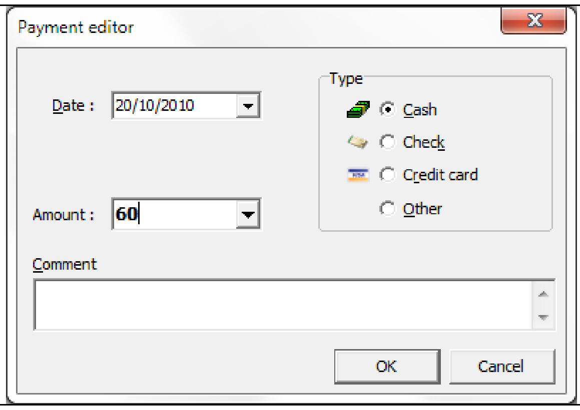
Layout of the billing editor.

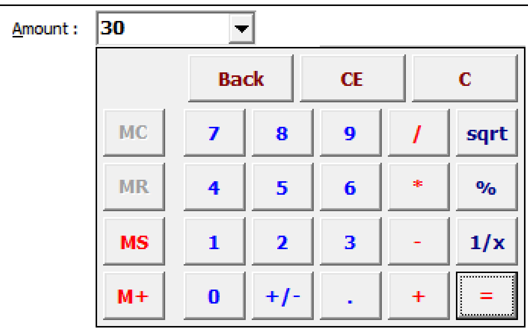


1.5. Payment dialog.

a. Date (today's date)
b. Amount: initialized with the selected open bills total. Focus on the amount.
   We take care of any negative balance to reduce the amount to pay. In this case, add a comment.
c. Type of payment : cash, cheque, credit card, or other
d. Comment

=> The payment is split between all open bill starting with the selected ones and then with the latest invoices.



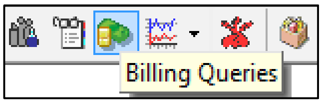


Note: A small calculator is available in the amount field

1.6. Population Analyis (Billing Queries)

1.6.1. Execute the analysis

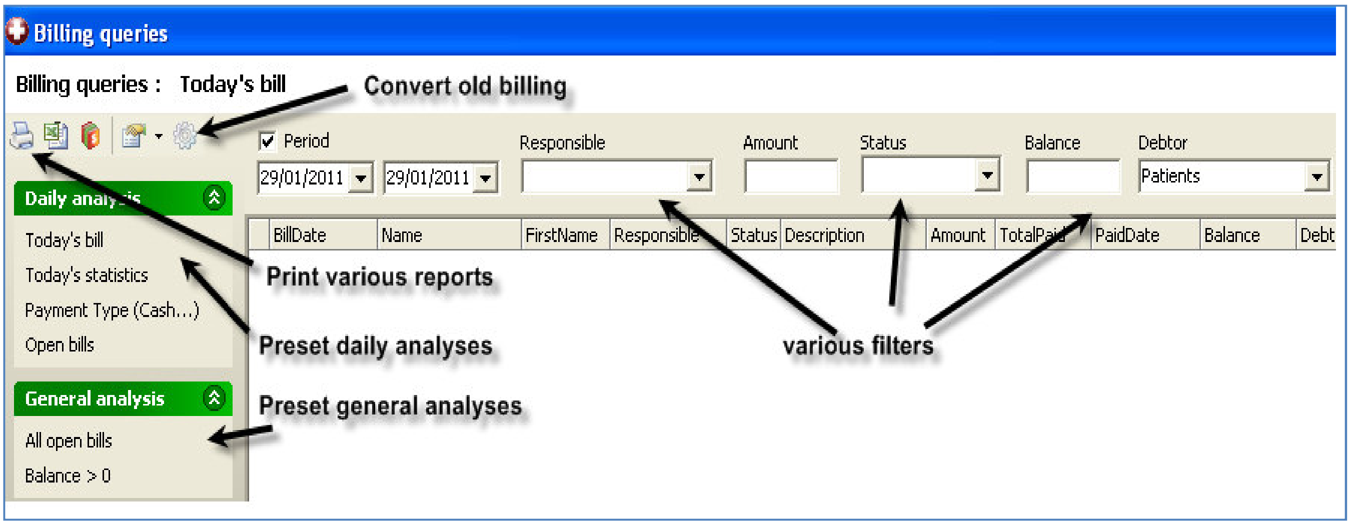
This is different from the old billing. It is not accessed from the normal population analysis button. We have a separate "billing queries" button on the main Health One ™ toolbar



But also directly from the invoice list in the billing tab or elsewhere

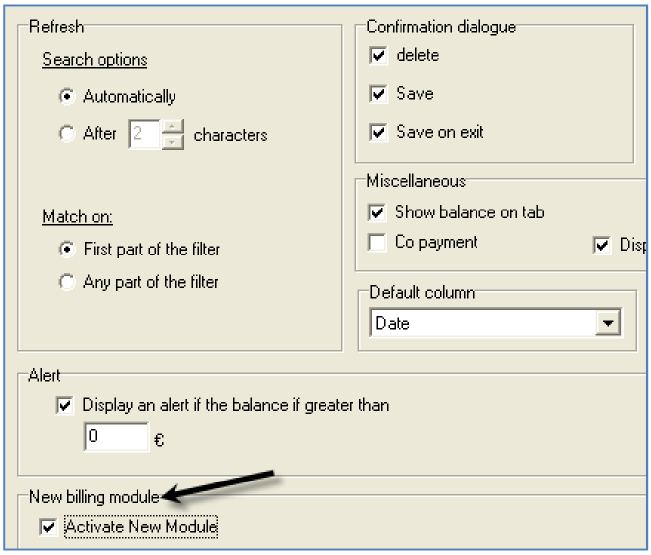
1.6.2. Analysis content

- End of day analysis. Shows the total invoiced and the total paid + open bills for the day.
  (*Day is the default, can be done for any period*)
  You should be able to print invoices for the day.
- List of invoices for today, list of open bills of today, list of income.
- Presents some cube analyses.

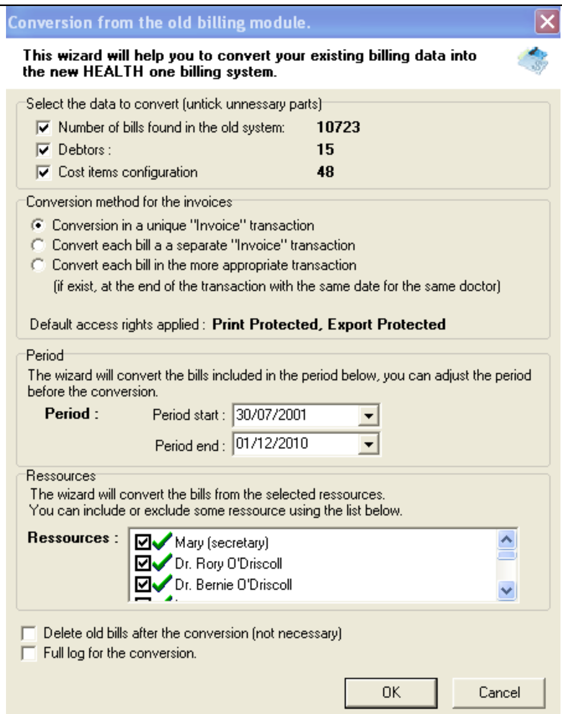


1.7. Conversion from old billing

When you upgrade, you can continue to use the old billing. To convert you must first initialise the new billing
Click Menu item Tools ➔ options ➔ billing ➔Activate new Module



Whe the new billing is activated the conversion is **not** done automatically. You have click on the convert icon eithr in the billing tab or in the billing queries screen.



We strongly suggest you leave the default options ticked as opposite.

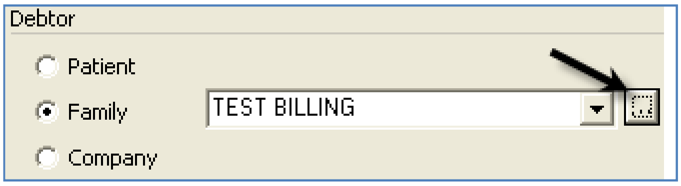
Conversion into a unique invoice transaction will take about 15 mins. for 50,000 billing records. This will create one transaction at the beginning of the medical chapter with all old bills converted. However each bill will still have the same date as in the old module.

Conversion in a separate invoice transaction will create a new transaction for every old bill. This is much slower and may take over an hour for 50,000 billing records

Conversion of each bill to the most appropriate transaction is slower still and may take several hours for 50,000 billing records

Family Billing

It is possible to make the head of family the “Debtor” for an invoice e.g. for children.
In the invoice editor this is assigned with the “family” entry box



You can use the little box next to the drop down list to select the head of family.
However, if you have already assigned the same family number to all members of the family, the drop down list will display these family members. You cna then select the appropriate family member as “head of family”. Bills can then be sent for all members to the family head.

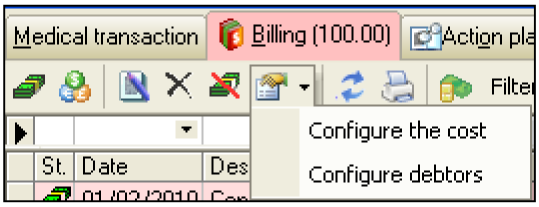
Once you have selected the “family head” for this patient, Health one will remember it and it will appear in the drop down list the next time you invoice this patient.

If you use family numbers to identify several patients of the same family, you can define the family head in the patient file (in the administrative transaction) by adding an asterix * after the family number in the file of the family head. If you use this system Health one will immediately find the family head for, say a child, and present you with this name when you create an invoice for the child.

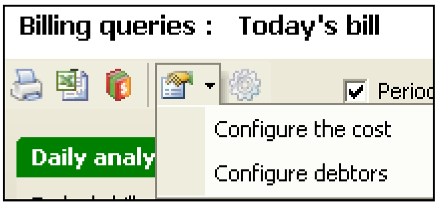
Configuring the cost items and Debtors

Normally the cost items and Debtors will be converted from the old module.
You can create new billing items at several places in the billing module

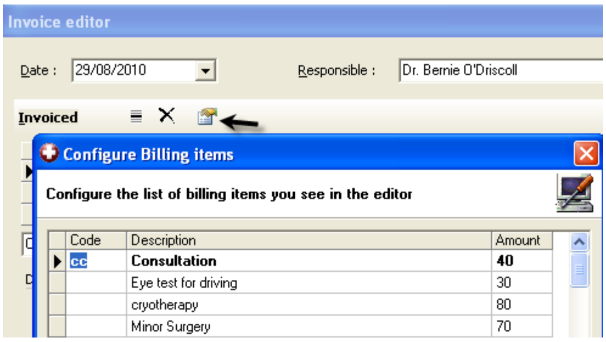
Configure cost items or debtors from **billing tab**



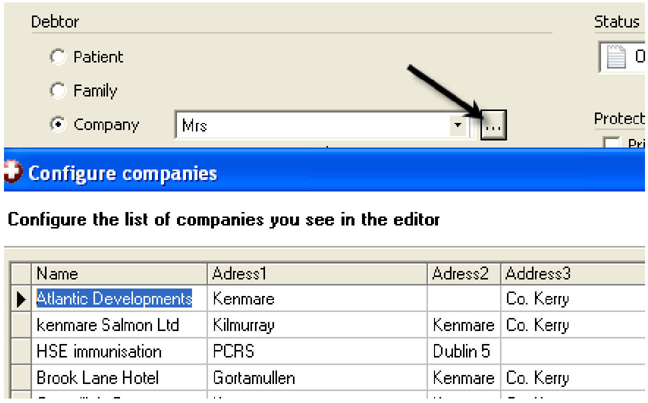
Configure cost items or debtors from **Queries screen**



Configure cost items from **invoice editor**



Configure debtors (companies) from **Invoice editor**



The configuration database for the billing module (billing.mdb) is stored in the dbf folder.
Health one will look for this database in the DBF folder using the following order
Shared config/CONFIG/SET1/DBF
Shared config\DBF
C:\Honewin\DBF

The specific editor allows you to:

- Add, edit, delete a cost item
- Review the sort order of the items
- Define a default cost item. (e.g. consultation)

ecific editor allows to

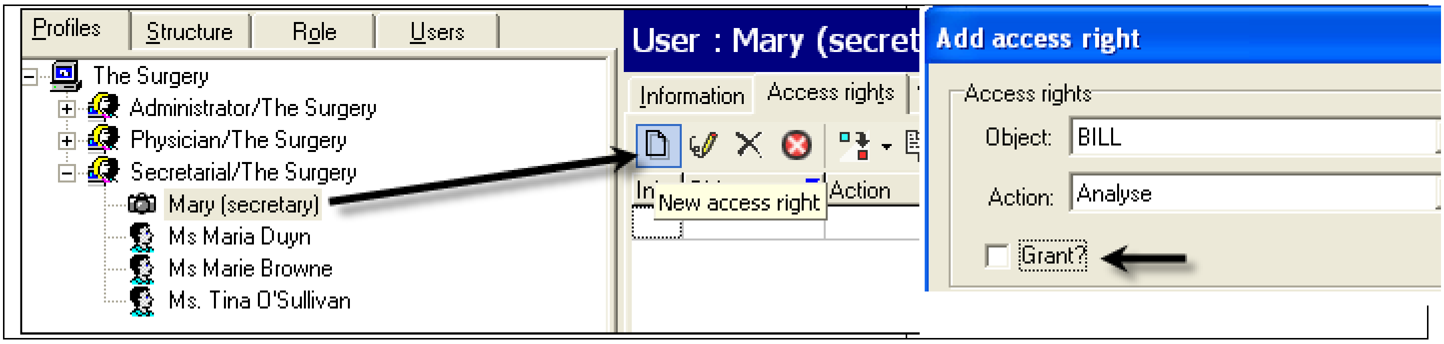
- Add, edit, delete a company
- Review the sort order of the companies

Configuring User Access to the billing module - User editor

It is possible to allow or deny the following access rights to the billing module for different users. This is important because the analyses are very powerful and easy to view from within Health one for any user.

You have to open the "User editor" or UserDB to assign these access rights. Only administrators have access to the user editor itself.

1. Disallow some users the right to view the billing analysis – disable the analysis icon
   In this case the highlighted user will not be able to see the analysis icon in the main Health one toolbar
   In the user editor, click on the relevant user – Click on the "access rights" tab on the right – click the "new" button – choose the object = Bill – choose the Action – Analyses – un tick the box = "Grant".
   There are several other access rights available in the "Object" section



2. Disallow some users the right to create an invoice in their own name. For example, usually the reception staff/secretaries should not create an invoice or payment in their own name
   In the user editor, click on the relevant user – Click on the "Information" tab on the right – click the "views" drop down list and change the view from "defined" to "identifier". At the bottom (4th from last) of this list is the field called "billing denied". Put the number one – 1 – in the box next door. This user's name will not now appear in the list of users when creating a new invoice/payment