

NOTES


Chapter 5

.....

Patient Billing

In version 9 of Medisoft, there is a new feature called **Statement Management**. It is very similar to Claim Management, providing a central location for you to manage all of your statements. **Statement Management** is an **Advanced** or **Higher only** feature. In previous versions of the software, you would print statements through the **Reports** menu. We will go over how to print patient statements from the Reports menu for the basic Medisoft users. Patient statements can be sent on paper or electronically, and we will go over both options.

Statement Management

Statement Management can be accessed by clicking on the **Activities** menu and choosing Statement Management or by clicking on this icon  on the Medisoft Speed bar. *Figure 3.13.*

NOTES

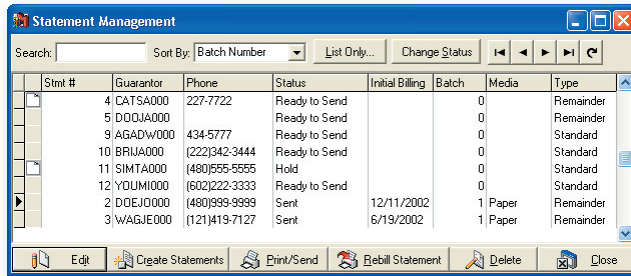


Figure 3.13

The Statement Management window is set up exactly like Claim Management. You can sort the statements by *Batch number*, *Chart number*, *Date Created*, *Initial Billing Date*, *Last Billing Date*, and *Statement number*.

There is another sort option when you click on the *List Only* button. This will allow you to filter by *Billing Method*, *Status*, *Chart Number*, or *Statement Date*.

The graphic of a sheet of paper to the left of the statement line indicates a note associated with this statement; you can view the note by editing the statement.

The *Statement number* works the same as Claim Management, and is created automatically. The first statement will be statement number 1. It will number chronologically as you create statements.

The *Guarantor* is the person to whom the statement is to be sent. The phone number is in the next field.

All of the same statuses from Claim Management apply in Statement Management. The statement must have a status of *Ready to Send* to print.

The *Initial Billing* date displays the first time this statement was ever billed.

As previously mentioned, statements can be sent either on paper or electronically. The next field displays whether this claim is being sent on paper or electronically. However, unlike Claim Management, the media type is not selected until you bill the statement.

Medisoft has two types of statements: *remainder* and *standard*. The last field displays which type of statement it is.

The buttons at the bottom of the screen are also the same as Claim Management: *Edit*, *Create Statements*, *Print/Send*, *Rebill Statement*, *Delete*, and *Close*.

Standard Statements

Standard statements include *ALL* transactions for the patient. This means that the patient will receive a bill for the full account balance; even those charges that are pending insurance responsibility. Standard statements can sometimes lead to confusion by the patient. If you submit a standard statement and they see their entire account balance, they will probably call the office to ask why their insurance company has not paid.

Remainder Statements

Unlike Standard statements, Remainder statements will only bill the patient the balance that is outstanding—after any insurance companies have responded. If all of the patient's charges are pending a response from the insurance company, a statement will not be printed. This statement will show a true patient balance and should help to alleviate as many calls to your billing department.

Creating Statements

To create statements click the *Create Statements* buttons. The **Create Statements** window will be displayed as seen in *figure 3.14*.

NOTES