Atlas CRM
Billing Explanation/Tutorial
(revised 1/16)

I. Patient Billing ($) Section Overview:

The billing ($) page provides a lot of information and has a lot of functionality. Here is an overview of the layout and icons you will find.

A. Layout:

1. Subscriptions – Any patient who is being billed on a rotating basis, whether monthly, quarterly, bi-annually, or annually, will have their subscription status present in this section. If there is nothing listed, then a charge will not be generated automatically. You have the ability to edit the description of the charge, which is general descripton that is applicable each time the charge is created (i.e. medical services). You can also delete the charge too. I you want to switch someone from a monthly subscription to an annual subscription simply delete the monthly subscription and add (+) an annual subscription.

a. If you are extending a discounted rate for any person (i.e. corporate rate) that is different than the established pricing tiers, unselect the box "based on age" and add the appropriate rate. If the box is checked "based on age" than the subscription will always be billed based on the ages established in pricing tiers – fee would automatically be adjusted when their age places them in a different tier.

2. Credit Cards – Lists the credit cards on file. Multiple credit cards can be keep to choose from and you can assign the card that is can be set to auto-charge each month. Click on the + sign to add a new credit.

3. Invoices – Allows you to see all invoices that have existed on the account. Click on them for detailed information and the ability to email or download/print the invoice.

a. Notice to the right corner of the invoices section there is an option to "view yearly invoices". If a patient requests a YTD or a certain years invoice, choose this option to show a list of 2014, 2015, 2016 invoices that may exist for that patient. You can email or print these invoices too.

4. **Billing History – This is a line item history of all charges and payments existing on the account. If you need to delete a charge or refund a payment (part or whole), you can do this in the billing history. You also have to option to "move" a charge to a separate invoice (more explained later).**

5. **Communication Log – Any invoice that is emailed to a patient will be recorded in this log. This includes if you attach a custom note to a patient's invoice. This will be a record of your communication in that invoice. This also include a log of "Failed Payment" emails that are sent if a credit card is unable to process automatically.**

6. **Notes – Any billing notes that you want to keep on the account can be kept here. Click on the + sign to add a note.**

7. **Insurance Information (if any) – Can update insurance on record by clicking on the + sign.**

B. Icons

1. **Cogwheel (top right of page)**

a) ***Add credit/Write off* -** Allows you to post a credit to a patients account. This could be for referral bonuses, corrections made for billing errors, etc

b) **Auto-charge Settings – You can enable/disable an auto-charge setting and/or change the date a credit card is supposed to be charged automatically on.**

c) **Add to Collections – When you office wishes to submit an account to collections (either internal or external agency), this will effectively archive the patient's account and ensure that monthly fees do not occur anymore. You will be able to access the record of all patients in collections either by searching under archived patients or by viewing all patients in collections under the Billing and choosing the collections option.**

d) **Sell Inventory item – to be used if selling a "non-prescribable item. Medications or anything else that you want fully tracked in your patient's chart should be prescribed from the prescription module.**

e) Request credit card – this option is available if you need to send a targeted email to a patient to add or update a credit card on file. You can add a note if you prefer also. Side note: when you email an invoice, patients also have the opportunity to add a new form of credit card payment as well as pay their balance via a link in the invoice.

C. Add Misc Charge – Allows you to add a charge that is not already created by the software. An example of it's use is when a patient signs up during the course of the month and begins their membership immediately (instead of waiting until the beginning of the following month). You will want to add a misc charge for the current month. You have the option adding the charge to the current invoice by selecting the box (this will include the charge as a balance due this month). If you want the charge to show up on the next month's invoice and be included in the next month's balance, than do not select this box. Only if you want to process the payment at the same time as entering this misc charge do you want to select the box that states "add payment with this charge". Even if you do not choose to add the payment while entering the misc charge, you can still add the payment afterward the misc charge is successfully entered. This simply gives you the option to eliminate a step but is not essential.

D. Add Payment

1. Any payment that needs to be processed outside of the auto-charge options, whether check, cash, credit card, or money order. At the present, the software is not able to draft from a bank account (as of 1/2016) but will be able to in the future.

II. Family Membership (Family Group Name)

A. When a family enrolls, it is preferred (in general) to have all family members on one account. If a family enrolls online at the same time, the software will connect all families to the same billing account. If family members are enrolled separately, they will have different family group names. To ensure they are on the same account, you need to go to each member of that family account and edit their record (this is also the cogwheel icon in the patient profile section – i.e where it lists their DOB, account #).

1. Click on Edit Record, choose Edit patient profile

2. Find the section titled "FAMILY". This is the family group name. Every family member should have the exact same family name. When a family enrolls via online enrollment, the software sets this family name automatically and recognizes duplicate names in the system and will ensure that separate families are distinguished from each other. If you were entering information manually, I would recommend giving a family name of the LAST NAME_FIRST NAME (of the head of household – see note below).

3. After all families have the same family name, you can visualize all charges associated with a family in the billing section ($). The head of the household will be listed at the top of the page for the family account.

4. HEAD OF HOUSEHOLD -- The head of the household is the person who has placed their credit card on file, who will receive all invoices, and is ultimately responsible for the bill. You can change the Head of household by going to any family members account. Under the patient profile, you will see the last name of the family with a drop down box. If you click on this it will give you the option to choose a different head of household. Please note – if you change the HOH to a family member who did not previously have a credit card on file for billing purposes, then it will be necessary to obtain the billing information for this person. Credit cards on file are specific to the person they were entered under and listed as head of the household.

III. Corporate Group Names

A. This applies only to businesses that have enrolled their employees with your clinic and who will receive a monthly invoice for membership fees. Like with family group names, all employees of a business must have the exact same corporate group name to effectively be linked to the proper account.

B. Corporate accounts can be set up under BILLING → COMPANIES. You will need to add (+) a company and enter all information to set the company up. After this is set up you can view the company billing page and select MANAGE. This will allow you to choose what charges will billed to the business and the percentage. In the majority of cases, the business will be billed for 100% of monthly charges and 0% of any labs, medications, or misc charges.

1. Due to likelihood that 0% of misc charges will be added to employer's account, if an employee is added after first of month, it will be necessary to add the misc charge under the company billing page. If you only add the misc charge to the employee/family page, the employee's family will be billed for the 1st month. For record keeping purposes you may choose to enter a misc charge under the employee's billing page also, but you will want to post a credit for the total of the misc charges that were also added under the companies billing page so that the patient's credit card is not charged for membership fees that were also charged to the employer. Here is an example of how you might post the description of the credit. Example: *Credit – Membership fees transferred to employer per agreement*

IV. Payments and receipts

A. When a payment is processed, either manually or by auto-charge, a patient who has an email on file will be emailed a confirmation of payment receipt and have access to the current invoice.

B. Moving charges: In the billing history to the right of each line item charge, there are options to delete or move. You are able to "move" a charge from one invoice to a previous invoice if necessary. A situation that you may choose to do this is when a patient wishes to pay for medications or labs at the time of service. As you may recall, medications dispensed or labs ordered will appear on the following month's invoice since invoices are only generated on the 1st of the month. You may choose to "move" the medication or lab charge to the current month's invoice so it is included in the balance owed. This way, the payment made will be applied to the balance of charges the patient wants due for the month. If the patient has a balance due (for example their auto-charge has not processed yet) and a payment is applied for the meds or labs from the current month but the charge is not "moved" than the payment will be applied to the existing balance, thus reducing the auto-charge payment. The medications and/or labs will still be part of the balance due next month if the charge(s) is (are) not moved.

V. Invoice – generation

A. Invoices are generated on the 1st of every month after midnight. The invoice will include the monthly charges and all charges that were entered the previous month.

B. Although invoices are generated each month, they are not automatically emailed or printed for patients. This allows you to review the invoice if necessary and have the most control.

VI. Emailing/Printing Invoices

A. After invoices have generated, you have the opportunity to BATCH invoices to be printed or be emailed.

B. Go to BILLING→PATIENTS page.

C. Click on Cogwheel in right corner. This gives you various options – including to batch print or batch email invoices.

1. Any patient that has an email listed in the primary email spot will have their invoice loaded into the queue to "Email batch of invoices"

2. Any patient that does not have an email on file will have their invoice loaded into the "Print batch of invoices".

3. What to do about those patients who have an email but prefer to have an invoice mailed to them versus receive electronically? You can keep their email on file, but move to the secondary email field (you can do this under edit record → edit contact details).

D. The List (either email or print list) will populate. You will have the option to send/print all at once OR you can choose to only check the boxes you wish to send/print. For example, you may choose to process smaller batches or uncheck a select few people who you wish to review their invoice before sending. (Note: You can see the balance due on their account on the right side. This give you the opportunity to catch any glaring errors or possibly an account that appears to be outstanding and you wan tot call their attention to their invoice).

1. Once you have the boxes checked that you wish to print or email, scroll to bottom of page. There will be a button to click to either send the invoices or download pdf's of the printable invoices. For invoices downloaded, there will be once more step to finalize the printing.

E. REVIEWING INVOICE (if you choose) PRIOR TO EMAILING/PRINTING IN BATCH

1. Any account that is in your batch print view can be viewed individually. Just click on the name and it will take you to their billing page where you can select their current month's invoice.

2. After you have reviewed the invoice, you can print (download) or email the invoice from the account's billing page. With the invoice open, click on the cogwheel in the right corner and make your choice to print or email.

   a) DOWNLOAD VS PRINT? – It is my preference to download and then print, but you may you may simply print too.

   b) EMAIL with CUSTOM NOTE – For those patients who you wish to include a note specific to their account, whether to draw attention to a past due balance from previous month or a charge on their invoice, you can check the box when emailing to include a custom note. Add your custom note and send. This note will be present (mentioned before) under communication log at the bottom of the billing page.

Enrollment Checklist:

- ○ With manual enrollment – do family members have the same "FAMILY" name? This ensures that all family members that are supposed to be on same billing account are together. Recommend Last Name_First Name (or anything that limits overlap of families that shouldn't be together). If your clinic is set up for online enrollment than this family name is automatically assigned when a family enrolls during same enrollment process. (See further information under Section III)
- ○ Head of Household? For families - who will be the person receiving the invoice or who has the credit card on file? The person whose credit card is on file should be listed as name at very top of page on the billing ($) page. (See further explanation under Section III)
- ○ Check that "subscriptions" are accurate and inclusive of all family members on the account in the billing section ($).
- ○ For patients enrolling after 1st of the month, it will be necessary to assign a MISC CHARGE. You may choose to charge full monthly fee or pro-rate the month. Again, choose if you wish to add to current month (will create an invoice) or to have charge show up on the following month's invoice). Invoices are automatically generated on the 1st.
- ○ Auto-Charge Settings Enabled? What date has patient chosen to have their credit card on file charged? A credit card will not automatically charge if this is not enabled with a date chosen. If patient is paying by check, you will need to disable the auto-charge setting if a credit card was placed on file.