Batching invoices and receipts

Last Modified on 23/01/2024 7:49 am AEDT

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

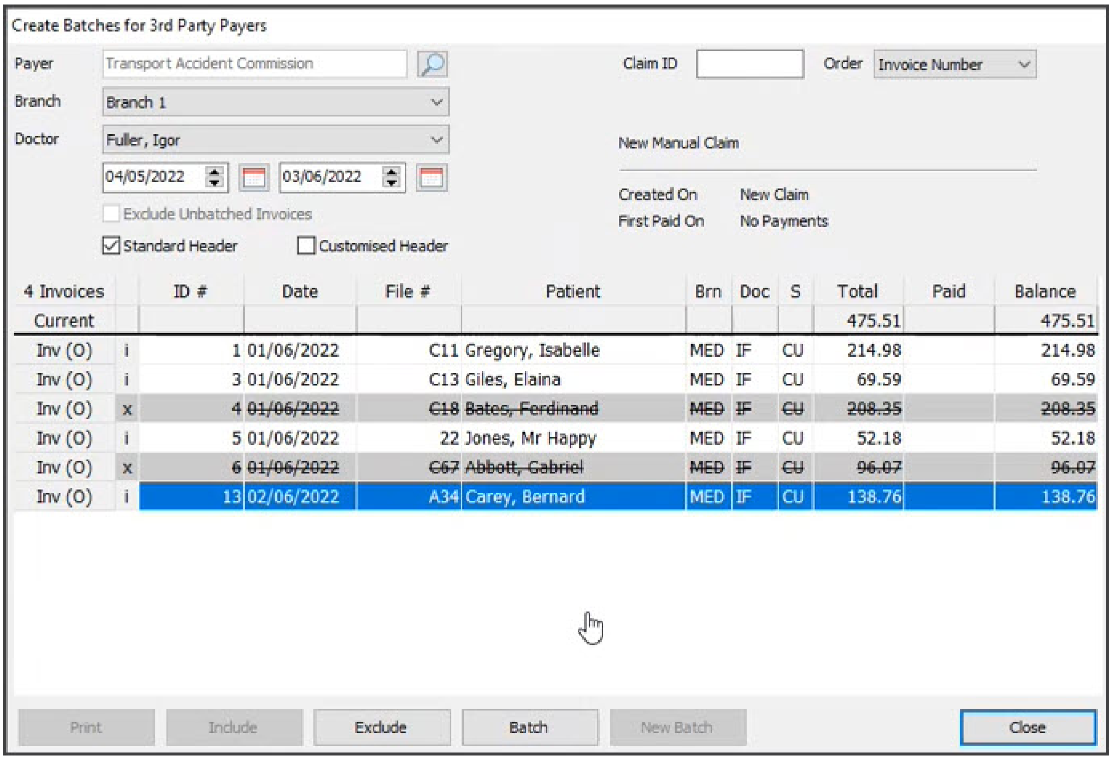
Batch together suppressed invoices and create a statement that can be used for billing a 3rd party payer.

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.



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

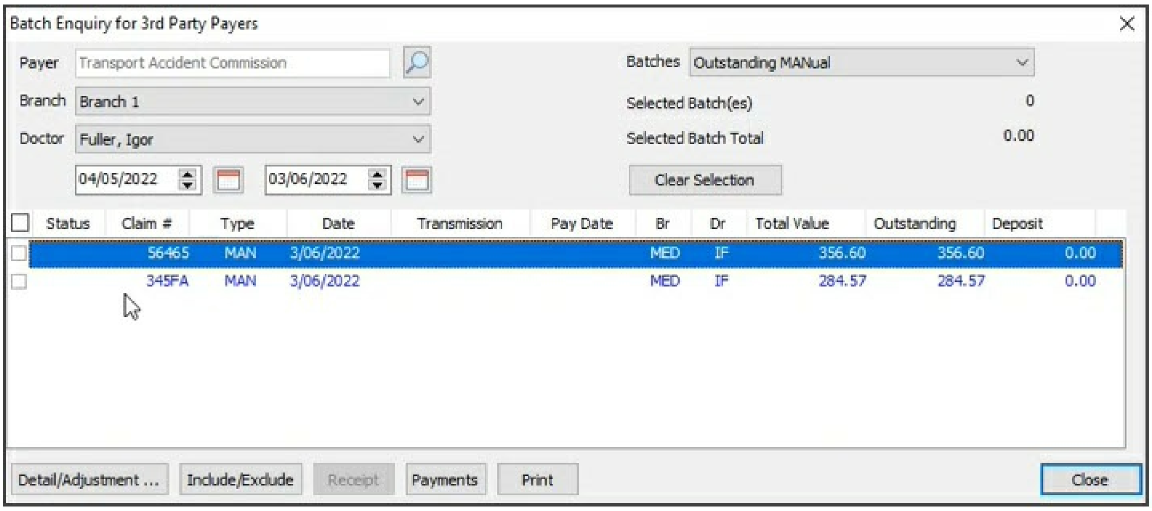
Manually receipt a batch of invoices when payment is received by a third-party payer.

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.

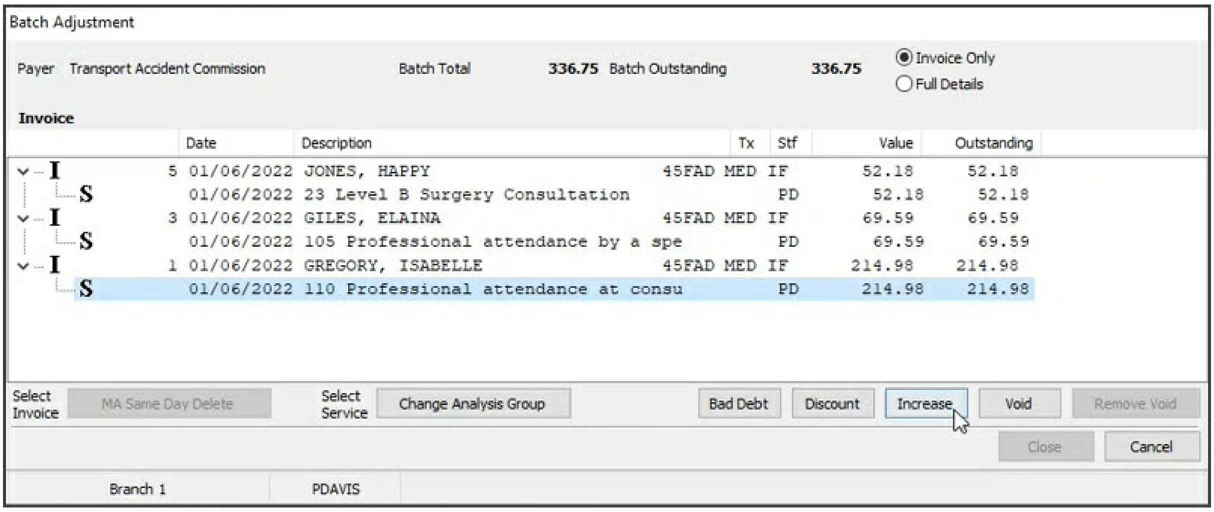
   The batches for the selected criteria will be displayed.



   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.**

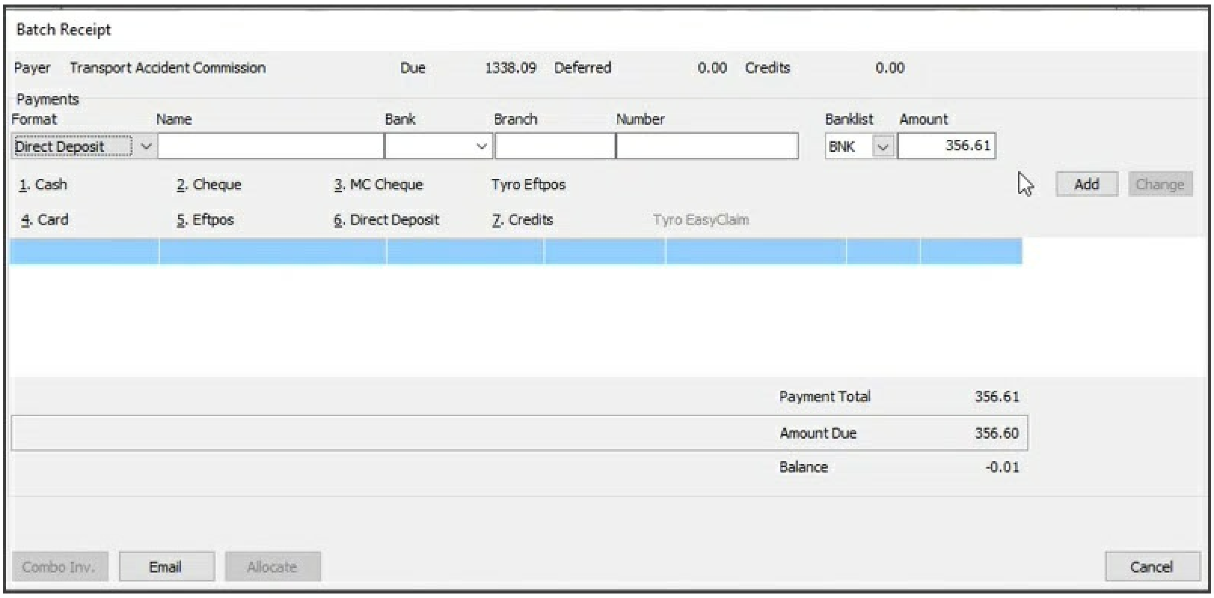
Use Include/Exclude to add and remove invoices from the batch.



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.

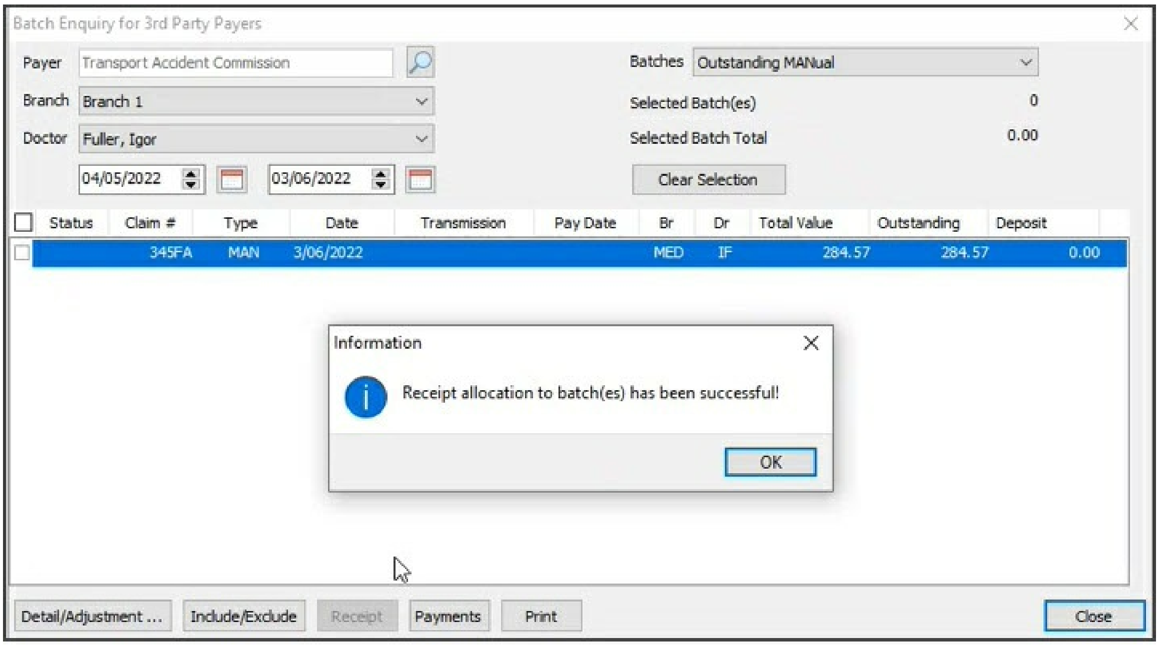


12. Select **Add**.
13. Select **Allocate**.

    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.


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
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