

Batching invoices and receipts

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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.

Create Batches for 3rd Party Payers

Payer
Transport Accident Commission

Branch
Branch 1

Doctor
Fuller, Igor

04/05/2022
03/06/2022

☐ Exclude Unbatched Invoices
☒ Standard Header
☐ Customised Header

Claim ID
Order
Invoice Number

New Manual Claim

Created On
New Claim
First Paid On
No Payments

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	C18	Bates, Ferdinand	MED	IF	CU	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	C67	Abbott, Gabriel	MED	IF	CU	96.07		96.07
Inv (O)	i	13 02/06/2022	A34	Carey, Bernard	MED	IF	CU	138.76		138.76

Print
Include
Exclude
Batch
New Batch
Close

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.

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

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

- Select **Batch**.
- 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:

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

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

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

The batches for the selected criteria will be displayed.

Status	Claim #	Type	Date	Transmission	Pay Date	Br	Dr	Total Value	Outstanding	Deposit
☐	56465	MAN	3/06/2022			MED	IF	356.60	356.60	0.00
☐	345FA	MAN	3/06/2022			MED	IF	284.57	284.57	0.00

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

- 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 Adjustment

Payer: Transport Accident Commission Batch Total: **336.75** Batch Outstanding: **336.75** ☒ Invoice Only
☐ Full Details

Invoice		Date	Description	Tx	Stf	Value	Outstanding
▼	I	5	01/06/2022 JONES, HAPPY	45FAD	MED IF	52.18	52.18
	S		01/06/2022 23 Level B Surgery Consultation		PD	52.18	52.18
▼	I	3	01/06/2022 GILES, ELAINA	45FAD	MED IF	69.59	69.59
	S		01/06/2022 105 Professional attendance by a spe		PD	69.59	69.59
▼	I	1	01/06/2022 GREGORY, ISABELLE	45FAD	MED IF	214.98	214.98
	S		01/06/2022 110 Professional attendance at consu		PD	214.98	214.98

Select Invoice: MA Same Day Delete Select Service: Change Analysis Group Bad Debt Discount **Increase** Void Remove Void

Close Cancel

Branch 1 PDAVIS

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.

Batch Receipt

Payer: Transport Accident Commission Due: 1338.09 Deferred: 0.00 Credits: 0.00

Payments

Format	Name	Bank	Branch	Number	Banklist	Amount
Direct Deposit					BNK	356.61

1. Cash 2. Cheque 3. MC Cheque Tyro Eftpos Add Change

4. Card 5. Eftpos 6. Direct Deposit 7. Credits Tyro EasyClaim

Payment Total	356.61
Amount Due	356.60
Balance	-0.01

Combo Inv. Email Allocate Cancel

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