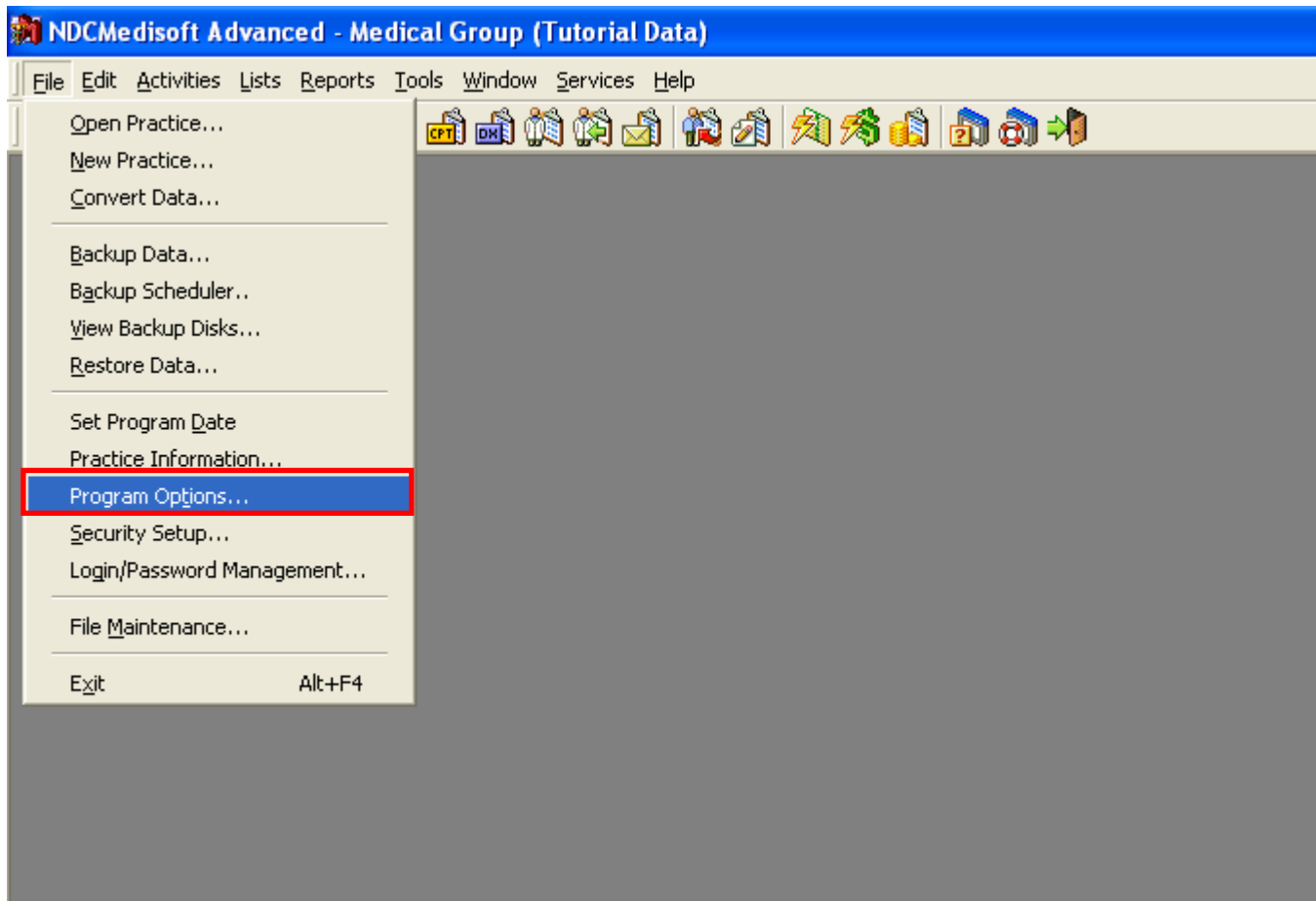## How do I use Cycle Billing?

NDCMedisoft Version 10 introduced a feature called Cycle Billing

The cycle billing feature lets you print statements every certain number of days. If you want to print statements every 30 days, you can set up a billing cycle of that length.

Follow these steps to set up a billing cycle:

1. Click on the File menu and Program Options.

2. Click on the Billing tab.

3. Place a check mark in the field labeled Use Cycle Billing.

4. In the field labeled Cycle Billing Days, enter the number of days you want to pass before each patient is sent another statement.

5. Click on Save.

Follow these steps to print statements in your billing cycle:

1. Set up your billing cycle according to the steps listed above.

2. Click on the Activities menu and Statement Management. (Cycle Billing ONLY functions through Statement Management. Any other method of sending statements WILL NOT function with Cycle Billing.)
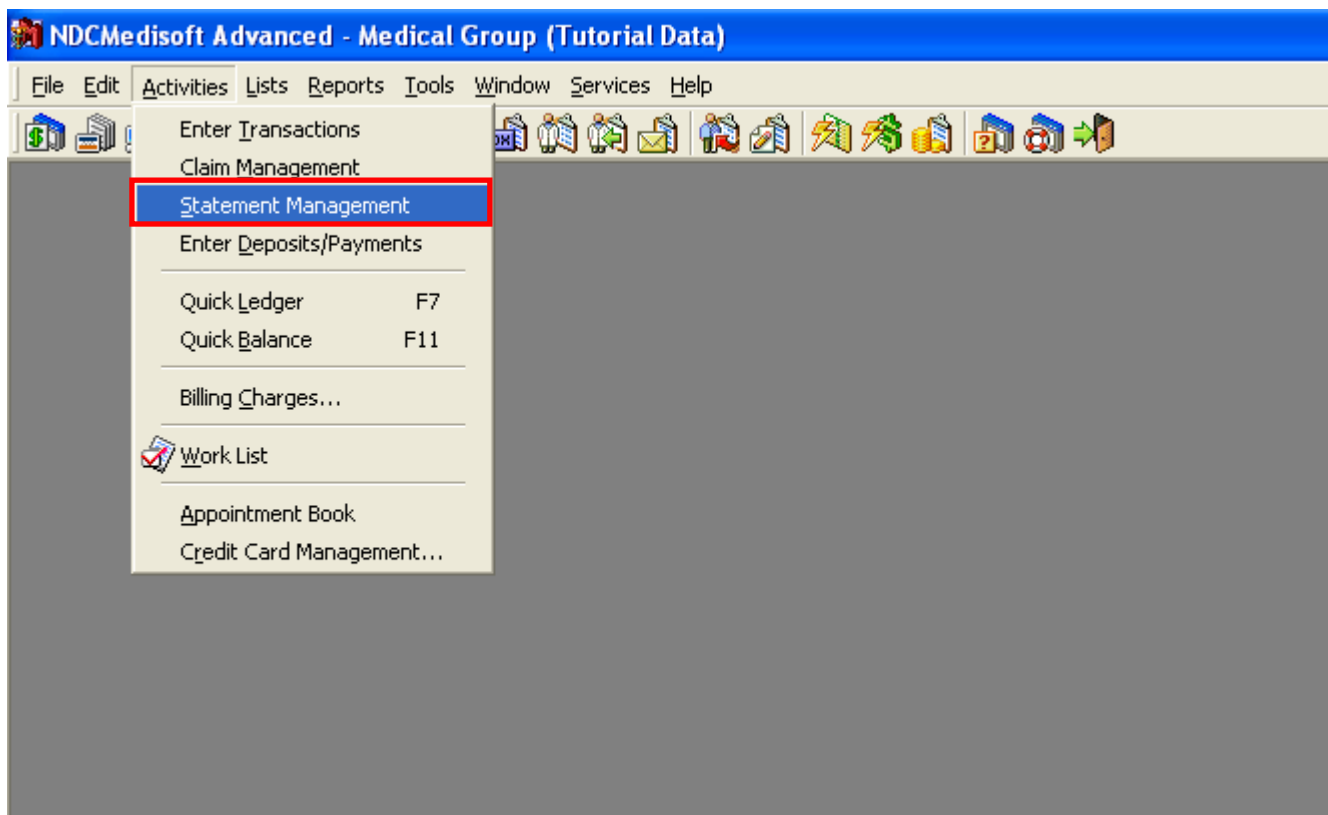
3. Verify that the statements you wish to send are listed in Statement Management. If they are not, click on Create Statements.
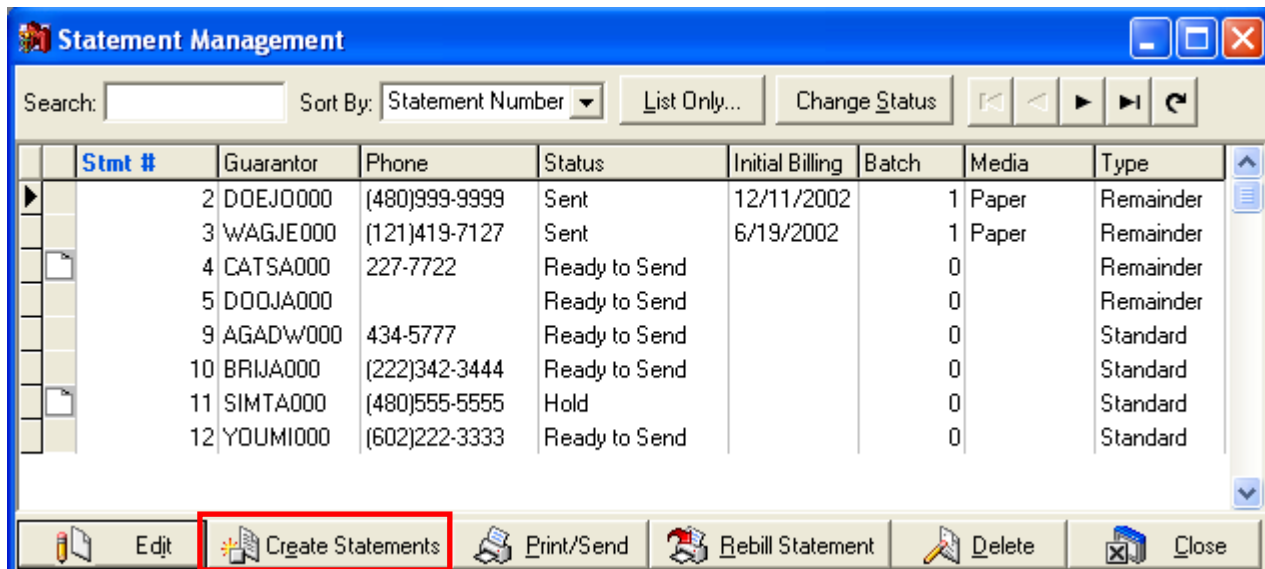
4. If the desired statements do appear, you will want to make sure the statements are eligible to be sent under the set up billing cycle. The statements print according to the *Next Statement Date* of each statement. If the *Next Statement Date* is on or before the current date, the statement prints.

If you have never printed statements with the billing cycle turned on, statements are printed according to the *Last Statement Date* stored in the statement record. If the *Last Billing Date* plus the billing cycle interval is on or before the current date, the statement prints. (For example: If your billing cycle is 30 days, the statement will print if today's date is at least 30 days AFTER the Last Billing Date.)

If both of these dates are blank, a statement WILL print.

These fields do not default to appear in the Statement Management Grid. For information on how to add them to the grid, refer to the article linked on the right side of this screen.

5. Click on Print/Send in order to print or transmit the eligible Statements.
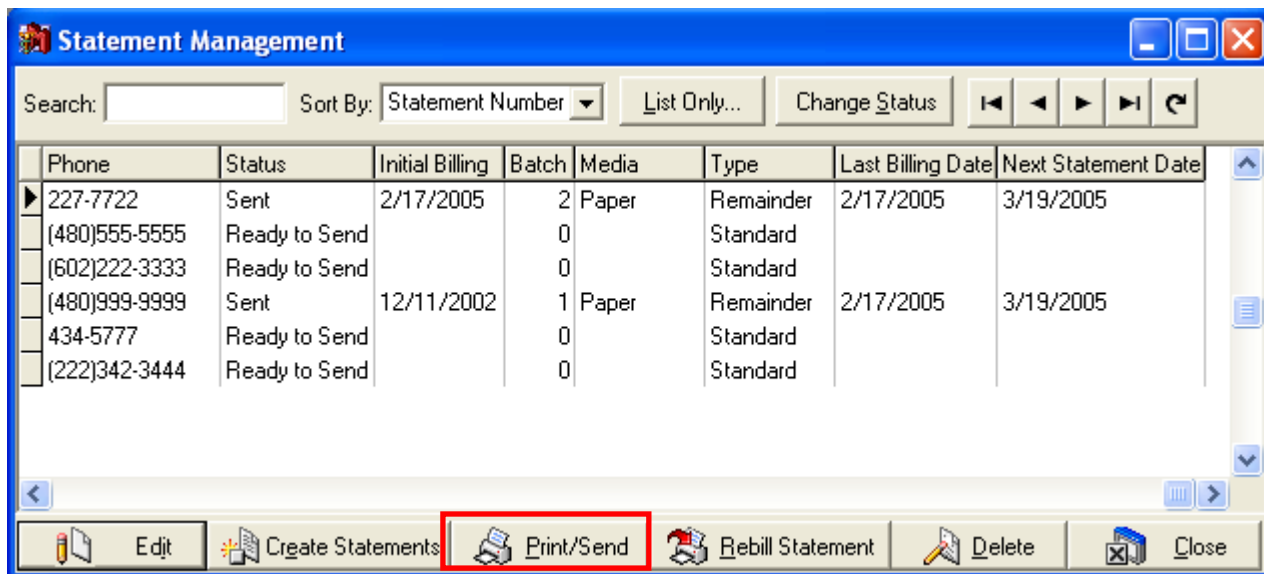
6. Select the billing method, and click on OK.
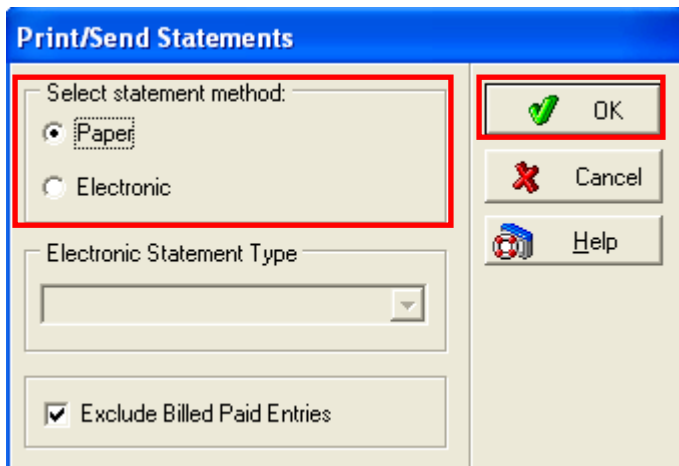
7. Select the Statement report you wish to print. Remember, there are two general types of statements, Standard and Remainder. The type of report you choose will determine which statements from Statement Management will print. If you have both Standard and Remainder statements listed, the only statements that will print will be the ones with the type that matches your selected report. If you don't have any statements listed with the type that matches your selected report, no statements will print. Click on OK.

Open Report

Report Title
NEW Pat. Stmt. (Comments 30,60,90 Color)
NEW Pat. Stmt. (Comments 30,60,90)
NEW Pat. Stmt. (Comments)
NEW Pat. Stmt. (Guar/Ins Est. Balance)
NEW Pat. Stmt. (Last Patient Pmt.&Amt)
NEW Patient Statement
NEW Patient Statement (30,60,90 Color)
NEW Patient Statement (30,60,90)
NEW Patient Statement (Color)
Patient Statement (All Payments)
Patient Statement (All Pmts/Deduct)
Patient Statement (Combined Payments)
Remainder Statement (All Payments)
Remainder Statement (All Pmts/Deduct)
Remainder Statement (Combined Payments)

- ✔ OK
- ✖ Cancel
- Help

☐ Show File Names

Statement Management

Search: [   ] Sort By: Statement Number ▾   List Only...   Change Status   ◄◄ ◄ ► ►◄ ⟳

	Phone	Status	Initial Billing	Batch	Media	Type	Last Billing Date	Next Statement Date
►	227-7722	Sent	2/17/2005	2	Paper	Remainder	2/17/2005	3/19/2005
	(480)555-5555	Ready to Send		0		Standard		
	(602)222-3333	Ready to Send		0		Standard		
	(480)999-9999	Sent	12/11/2002	1	Paper	Remainder	2/17/2005	3/19/2005
	434-5777	Ready to Send		0		Standard		
	(222)342-3444	Ready to Send		0		Standard		

Edit   Create Statements   Print/Send   Rebill Statement   Delete   Close

8. Select the type of output you wish to use, and click on Start.

Print Report Where?

Print Selection
- ○ Preview the report on the screen
- ● Print the report on the printer
- ○ Export the report to a file

NOTE: Reports can be printed from the Preview window.

- 🖨 Start
- ✖ Cancel
- Help
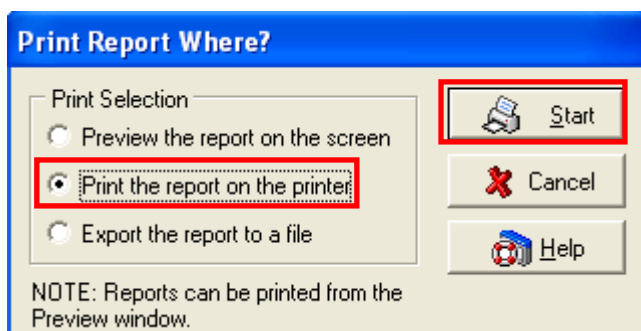
9. If you wish to filter the eligible statements to only include selected ones, use the Data

Selection Questions to do so. Click on OK. (Note: If you filter out statements that would have been eligible to print, those statements will print the next time you run your statements, if they are not excluded using filters again. In general, when doing cycle billing, it is best to leave the filters blank, in order to print ALL of the eligible statements.)

Patient Statement (All Payments) : Data Selection Questions

NOTE: A blank field indicates no limitation, all records will be included.

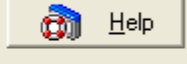|		
Chart Number Range:	to	
Date From Range:	to	
Insurance Carrier #1 Range:	to	
Statement Total Range: 0.01	to 99999	
Guarantor Billing Code Range:	to	
Patient Indicator Match:		
Statement Number Range: 1	to 12	
Batch Number Match:		
Statements Older Than (Days):		
In Collections Match:		
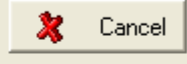
OK

Cancel

Help

10. Eligible statements that were not excluded with the Data Selection Questions will now print.

Happy Valley Medical Clinic

5222 E. Baseline Rd.
Gilbert, AZ 85234
(800)333-4747

Dwight Again
1742 N. 83rd Ave.
Phoenix, AZ 85021

Statement Date	Char
02/17/2005	AG/

Make Checks Payable To:

Happy Valley Medical Clinic
5222 E. Baseline Rd.
Gilbert, AZ 85234
(800)333-4747

Date of Last Payment: 12/4/2002   Amount: -8.00   Pre

Patient: Dwight Again   Chart Number: AGADW000   Case:

Dates	Procedure	Charge	Paid by Primary		Paid Gua
09/03/02	73130	45.00	0.00		
09/03/02	99213	60.00	0.00		

Patient: Dwight Again   Chart Number: AGADW000   Case:

---

11. The Last Billing Date and Next Statement Date fields will now update to reflect the date the statements were printed, and the next date a statement will go out to this patient for these charges.

Statement Management

Search: | Sort By: Statement Number ▼   List Only...   Change Status |◄ ◄ ► ►| ↻

Phone	Status	Initial Billing	Batch	Media	Type	Last Billing Date	Next Statement Date
▶ 227-7722	Sent	2/17/2005	2	Paper	Remainder	2/17/2005	3/19/2005
(480)555-5555	Sent	2/17/2005	3	Paper	Standard	2/17/2005	3/19/2005
(602)222-3333	Sent	2/17/2005	3	Paper	Standard	2/17/2005	3/19/2005
(480)999-9999	Sent	12/11/2002	1	Paper	Remainder	2/17/2005	3/19/2005
434-5777	Sent	2/17/2005	3	Paper	Standard	2/17/2005	3/19/2005
(222)342-3444	Sent	2/17/2005	3	Paper	Standard	2/17/2005	3/19/2005

Edit   Create Statements   Print/Send   Rebill Statement   Delete   Close

What causes patients to receive statements prior to the Next Statement Date?

There are a few things that can cause patients to receive statements prior to the expected Next Statement Date.

1. If you print statements from outside Statement Management, Cycle Billing will not be considered.

2. If the patient has NEW charges and a new statement is created prior to the Next Statement Date.

3. If the patient has any other statements with a Next Statement Date prior to the Next Statement Date on the Statement you are looking at.

4. If your data does not reflect any dates in the Last Billing Date field, or the Next Statement Date field, a statement WILL print.

What causes eligible statements not to print?

There are also a few things that would cause an eligible statement not to print.

1. The type of statement you selected does not match the type of statement listed in Statement Management.

2. The filters you have entered exclude the statement you are trying to print.

3. The balance on the statement is now zero. (This is an extension of item 2, because there is an automatic filter that filters out any statement balances under $0.01.)