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.

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2. Click on the Billing tab.

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

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

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5. Click on Save.

Program	Options								
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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.

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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.

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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.

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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.

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6. Select the billing method, and click on OK.

Print/Send Statements							
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Electronic Statement Type	<u>фр</u> Неlp						
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Exclude Billed Paid Entries							

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



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 in	ncluded.						
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Insurance Carrier #1 Range: 📃 💌 🗩 to							
Statement Total Range: 0.01 to 99	999 🕅 Help						
Guarantor Billing Code Range:	▼ Ø						
Patient Indicator Match:							
Statement Number Range: 1 to 12							
Batch Number Match:							
Statements Older Than (Days):							
In Collections Match:							

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			Statement Date 02/17/2005	Char AG,		
Dwigh 1742 Phoe	nt Again N. 83rd Ave. nix, AZ 85021				Make Checks Payal Happy Valley Medi 5222 E. Baseline Rd Gilbert, AZ 85234 (800)333-4747	ole To: cal Clinic
Date of	f Last Paymer	it: 12/4/2002	2 Amoun	t: -8.00		Pre
Patient:	Dwight Again	l	Ch	art Number.	AGADW000	Case:
Dates 09/03/02 09/03/02	Procedure 73130 99213	Charge 45.00 60.00	Paid by Primary 0.00 0.00			Paic Guai
Patient:	Dwight Again		Ch	art 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.

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	(480)555-5555	Sent	2/17/2005	3 Pape	r Standard	2/17/2005	3/19/2005		
	(602)222-3333	Sent	2/17/2005	3 Pape	r Standard	2/17/2005	3/19/2005		
	(480)999-9999	Sent	12/11/2002	1 Pape	r Remainder	2/17/2005	3/19/2005		
	434-5777	Sent	2/17/2005	3 Pape	r Standard	2/17/2005	3/19/2005	-	
	(222)342-3444	Sent	2/17/2005	3 Pape	r Standard	2/17/2005	3/19/2005		
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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.)