Viewing the Billing Status on the Schedule

Last Modified on 07/26/2023 1:55 pm EDT

Version 21.1

Overview

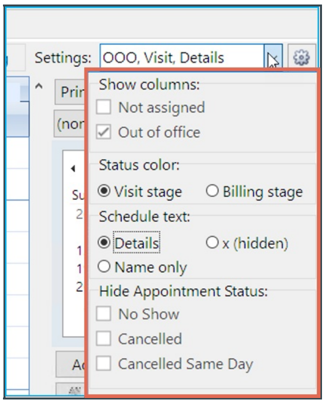
Users have the option to view appointments on the Calendar and Tracking Schedules by their Billing Status. This status displays appointments depending on what Billing Status the appointment is in as opposed to the Visit Status the appointment is in. If an appointment does not have a Billing Status, the field remains blank. The statuses and their display colors are:

- Superbill Exists - Appointment is displayed inlight blue.
- Ready to Bill - Appointment is displayed inbright green.
- Completed - Appointment is displayed ingray.
- No Show - Appointment is displayed inred.
- No Show*- Appointment is displayed inred.
- Cancelled - Appointment is displayed indark gray.
- Cancelled Same Day - Appointment is displayed indark gray.

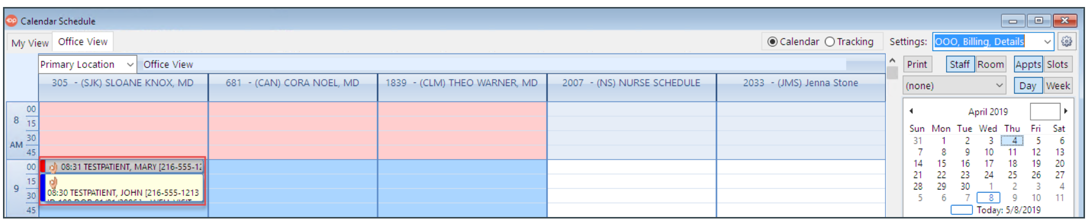
From the Calendar Schedule

Path: Clinical, Practice Management, or Billing tab > Schedule button > Calendar radio button

1. Navigate to the Calendar Schedule window by following the path above.
2. Click the **Settings** drop-down menu located on the right side of the window.



3. In the Status color section, select the**Billing Stage** radio button. The appointments on the Calendar Schedule are now displayed in the Billing Status colors.

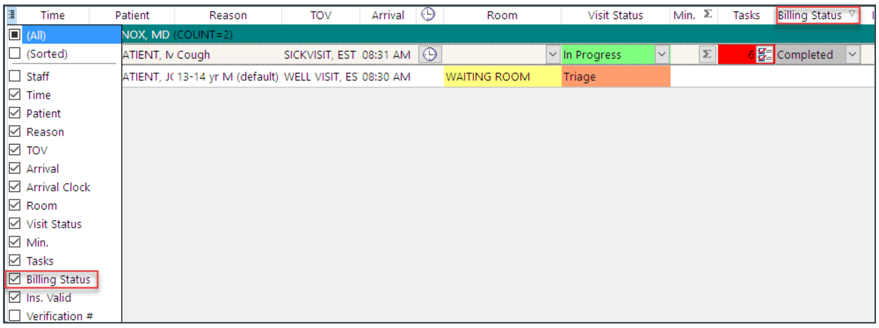


From the Tracking Schedule

Path: Clinical, Practice Management, or Billing tab > Schedule button > Tracking radio button

1. Navigate to the Tracking Schedule window by following the path above.
2. Locate the **Billing Status** column. The Billing Status for the appointment is displayed.

Tip: If the Billing Status column is not displayed, click the Show/Hide/Move columns button located to the left of the first column in the grid, and select the Billing Status checkbox.



Version 21.0

Overview

Users have the option to view appointments on the Calendar and Tracking Schedules by their Billing Status. This status displays appointments depending on what Billing Status the appointment is in as opposed to the Visit Status the appointment is in. If an appointment does not have a Billing Status, the field remains blank. The statuses and their display colors are:

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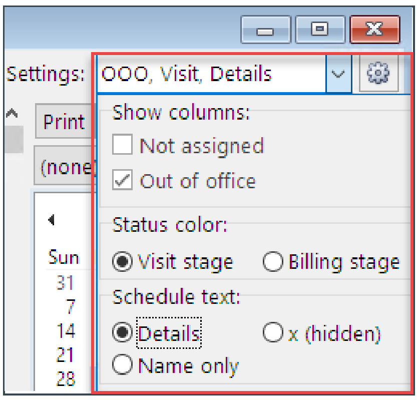
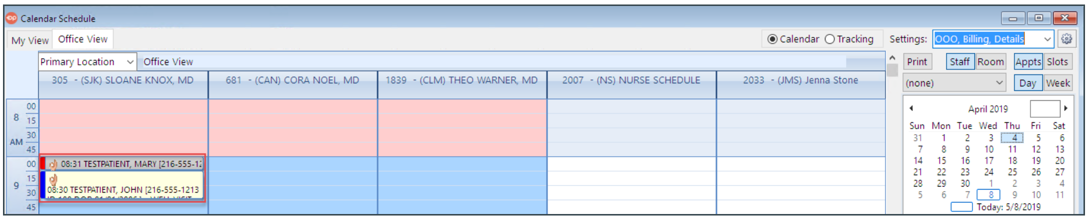
From the Calendar Schedule

Path: Clinical, Practice Management, or Billing tab > Schedule button > Calendar radio button

1. Navigate to the Calendar Schedule window by following the path above.
2. Click the **Settings** drop-down menu located on the right side of the window.



3. In the Status color section, select the**Billing Stage** radio button. The appointments on the Calendar Schedule are now displayed in the Billing Status colors.



From the Tracking Schedule

Path: Clinical, Practice Management, or Billing tab > Schedule button > Tracking radio button

1. Navigate to the Tracking Schedule window by following the path above.
2. Locate the **Billing Status** column. The Billing Status for the appointment is displayed.

Tip: If the Billing Status column is not displayed, click the Show/Hide/Move columns button located to the left of the first column in the grid, and select the Billing Status checkbox.