



# BillingBuilder – Consumer Billing Dashboard

## AWARDS INSTRUCTION SHEET

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The AWARDS BillingBuilder feature (located in the Fiscal/Program module) enables users to bill payers for services provided to clients and recorded in AWARDS. Payers can include Medicaid, Medicare, private insurances, self-paying clients, or any other third-party payer that accepts the 837I or 837P electronic billing file, HCFA paper claim forms, or printed invoices.

The Consumer Billing Dashboard component of the AWARDS BillingBuilder enables users to create payment records for self-paying clients who make co-payments or full payments for services rendered. Once payment is recorded, a receipt for that payment can then be printed for the client. The Dashboard also provides users easy access to view demographics data, insurance/entitlements, diagnosis data, billing status, billing history report, payments/adjustments, and summary/statement information for the individual.

Note that the Consumer Billing Dashboard feature can be accessed within AWARDS from the Calendar, Consumer Lookup, or the BillingBuilder. This document focuses on accessing it from the BillingBuilder.

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### REQUIRED PERMISSIONS

The BillingBuilder, of which the Consumer Billing Dashboard feature is a part, is accessed from within the Fiscal/Program. Access to that module and feature are limited to users with these permissions:

- **DATA ENTRY / ACCESS** – Unless you are a member of the Fiscal Staff or Executive Officer user groups, you must have the “Display Executive Administration Buttons” and “Display Fiscal Buttons” permissions.

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### ABOUT THIS DOCUMENT

This document is intended to guide you through several Consumer Billing Dashboard tasks in the AWARDS BillingBuilder. Specific topics covered are:

- **Entering Co-Pay Amounts** – Learn to enter full or partial co-pay amounts step-by-step. Page **1**
- **Entering Self-Pay Amounts** – Learn to enter self pay records step-by-step. Page **4**
- **Printing a Payment Receipt** – Learn to print a receipt for a co-pay or self payment. Page **5**
- **Updating / Deleting a Payment** – Learn to correct or otherwise update existing payment records. Page **6**
- **Frequently Asked Questions** – Learn the answers to common Consumer Billing Dashboard questions. Page **8**

Prior to processing in person payments for self-paying clients using the steps discussed in this document, please ensure that the clients have entitlements records created for Self-Pay as an insurer, or a co-payment amount indicated in the client's entitlement records for another insurer.

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## ENTERING CO-PAY AMOUNTS

In person payments can be used to enter full or partial co-pay amounts. To do so, complete the following steps:

1. From the *AWARDS Opening Menu* page, click **Fiscal/Program**. The *Fiscal/Program Reports Menu* page is displayed.
2. Click **BillingBuilder**. The *BillingBuilder Menu* page is displayed.
3. Click **Consumer Billing Dashboard**. The *Consumer Billing Dashboard – Select Programs* page is displayed.
4. Click the **Program** drop-down arrow and select the program associated with the client for whom the co-pay is to be entered.
5. If the client for whom the co-pay is to be entered is for a former (discharged) client, click the **Roster Archives** check box.
6. Click **CONTINUE**. The *Consumer Billing Dashboard – Select Client* page is displayed.
7. Click the **Client** drop-down arrow and select the client for whom the co-pay is to be entered.
8. Click **CONTINUE**. The *Consumer Billing Dashboard* page is displayed.

This page contains a list of any previously entered in person payments for the selected client, as well as buttons to view additional client information, described below:

- **Appointments/Calendar** – Displays the Calendar for the selected consumer in the selected program. The calendar then shows a button to take you back to the billing dashboard.
- **Demographics Data** – Displays a read-only version of the Demographics section of the Face Sheet for the selected client with a button for data entry and a button to return to the billing dashboard.
- **Insurance/Entitlements** – Displays the Certified Entitlements for the selected client with a button to return to the billing dashboard.
- **Diagnoses Data** – Displays a read-only version of the Diagnoses section of the Face Sheet for the selected client with a button for data entry and a button to return to the billing dashboard.
- **Billing Status** - Displays the Billing Services Report, except that it is being run for the selected client in the selected client rather than a program census. If the billing type is fee for service or per diem, you can run the report for any date range needed. There is also a button to return to the billing dashboard.
- **Billing History** – Displays the Consumer Billing History Report for the selected consumer in the selected program. There is also a button to return to the billing dashboard as well as a button to return to payments/adjustments for the selected client.
- **Payments/Adjustments** – Displays the Payments and Adjustments of the selected consumer. There is also a button to return to the billing dashboard as well as a button to return to billing history for the selected client.

- **Summary/Statement** – Displays a summary/statement designed to be given to the consumer that is based on the information shown in the billing history report. Clicking this button displays the *Summary/Statement* settings page, allowing users to set date ranges and report variables. Once the desired date range has been selected, please ensure that the appropriate boxes have been checked for Client, Transaction Type, Type, Description, Program, Amount, Total Due, Posted Date, Employee, and Date of Service, as each checked box will produce a column of data in the report.

9. Click **Add New Payment**. The *Consumer Billing Dashboard – Add new payment* page is displayed. →

10. Configure the fields and options on this page as follows:

*Some of the options on this page are dynamic, meaning that the selections they make available to you are based on other options you've set earlier in the page. As a result, please configure the options in the order in which they are described here.*

- **Insurer** – Click this drop-down arrow and select an Insurer for which a co-pay amount has been entered in the client's entitlement records. If the appropriate insurer is not listed, select "Other" and enter the insurer's name in the **Other Type** field.
- **Billing Types** – Click this drop-down arrow and select the billing type. The types available here are based on the selected insurer.
- **Procedures** – Click this drop-down arrow and select the procedure. The procedures available here are those associated with the selected billing type.
- **Date Paid** – In this field, type the date on which the payment was made (using mm/dd/yyyy format).
- **Amount Paid** – In this field, type the amount paid. If this is a partial payment, the balance is added to the read-only Outstanding Balance on this page after the payment record is saved (in step 11).

11. Click **Save**. The *Payment Was Recorded Successfully!* page is displayed, confirming that the payment you entered was saved, and providing read-only details regarding that payment.

To print a receipt for the payment from this page, click **Printable Receipt**. To print a receipt at a later time, follow the steps under "Printing a Payment Receipt" on page 5.

When a co-payment is entered for a consumer, an invoice batch is automatically created with an invoice for that co-payment, so that the co-pay will have an associated invoice to be applied to for A/R purposes. The invoice batch will automatically be posted to the fiscal period of the date entered under Date Paid (*if the fiscal period is still open to entry, if not the current open fiscal period will be assigned*). Additionally, the invoice batch will be marked with the label **Copay** in the information heading and a **(Co-payment)** label will be inserted into the description column of the Consumer A/R History Report and the A/R Ledger Report for all invoices and payment ledger types that are created when a co-payment is entered within the Consumer Billing Dashboard > In Person Payments feature.

The process of entering a co-payment is now complete.


*When the payment is saved an invoice is created for the client for the amount owed. This invoice can be accessed using the BillingBuilder Menu, Edit Invoices component. For more information on using Edit Invoices, please refer to the "BillingBuilder Processing" instruction sheet available online.*

## ENTERING SELF-PAY AMOUNTS

The Consumer Billing Dashboard feature can be used to enter self payments. To do so, complete the following steps:

1. From the *AWARDS Opening Menu* page, click **Fiscal/Program**. The *Fiscal/Program Reports Menu* page is displayed.
2. Click **BillingBuilder**. The *BillingBuilder Menu* page is displayed.
3. Click **Consumer Billing Dashboard**. The *Consumer Billing Dashboard – Select Programs* page is displayed.
4. Click the **Program** drop-down arrow and select the program associated with the client for whom the self pay is to be entered.
5. If the client for whom the self pay is to be entered is for a former (discharged) client, click the **Roster Archives** check box.
6. Click **CONTINUE**. The *Consumer Billing Dashboard – Select Client* page is displayed.
7. Click the **Client** drop-down arrow and select the client for whom the self pay is to be entered.
8. Click **CONTINUE**. The *Consumer Billing Dashboard* page is displayed.

This page contains a list of any previously entered in person payments for the selected client, as well as buttons to view additional client information.

9. Click **Add New Payment**. The *Consumer Billing Dashboard – Add new payment* page is displayed. 
10. Configure the fields and options on this page as follows:

*Some of the options on this page are dynamic, meaning that the selections they make available to you are based on other options you've set earlier in the page. As a result, please configure the options in the order in which they are described here.*

- **Insurer** – Click this drop-down arrow and select “Self-Pay.”

- **Billing Types** – Click this drop-down arrow and select the billing type. The types available here are based on the selected insurer.
- **Procedures** – Click this drop-down arrow and select the procedure. The procedures available here are those associated with the selected billing type.
- **Date Paid** – In this field, type the date on which the payment was made (using mm/dd/yyyy format).
- **Amount Paid** – In this field, type the amount paid. If this is a partial payment, the balance is added to the read-only Outstanding Balance on this page after the payment record is saved (in step 11).

11. Click **Save**. The *Payment Was Recorded Successfully!* page is displayed, confirming that the payment you entered was saved, and providing read-only details regarding that payment.

To print a receipt for the payment from this page, click **Printable Receipt**. To print a receipt at a later time, follow the steps under "Printing a Payment Receipt" on page 5.

The process of entering a self payment is now complete.

*When the payment is saved an invoice is created for the client for the amount owed. This invoice can be accessed using the BillingBuilder Menu, Edit Invoices component. For more information on using Edit Invoices, please refer to the "BillingBuilder Processing" instruction sheet available online.*

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## PRINTING A PAYMENT RECEIPT

To print a payment receipt for a co-pay or self payment, complete the following steps:

1. From the *AWARDS Opening Menu* page, click **Fiscal/Program**. The *Fiscal/Program Reports Menu* page is displayed.
2. Click **BillingBuilder**. The *BillingBuilder Menu* page is displayed.
3. Click **Consumer Billing Dashboard**. The *Consumer Billing Dashboard – Select Programs* page is displayed.
4. Click the **Program** drop-down arrow and select the program associated with the client for whom the receipt is to be printed.
5. If the client for whom the receipt is needed is a former (discharged) client, click the **Roster Archives** check box.
6. Click **CONTINUE**. The *Consumer Billing Dashboard – Select Client* page is displayed.
7. Click the **Client** drop-down arrow and select the client for whom the receipt is to be printed.

8. Click **CONTINUE**. The *Consumer Billing Dashboard* page is displayed.

This page contains a list of any previously entered in person payments for the selected client, as well as buttons to view additional client information.

9. Click the **Action** radio button next to the payment for which the receipt is needed.
10. Click **Printable Receipt**. The *Print* dialog box is displayed.
11. Configure the printer options as necessary, and then click **OK** to print the receipt.

The process of printing a payment receipt is now complete.

## UPDATING / DELETING A PAYMENT

Once payment records are in the system, you can correct them if they contain an error, or you can add a payment to them or make a payment toward an outstanding balance. Each of these data entry tasks are detailed in the pages that follow:

- [Correcting an Error in a Payment Record – Page 6](#)
- [Adding a Payment or Making a Payment Toward an Outstanding Balance – Page 7](#)

## CORRECTING AN ERROR IN A PAYMENT RECORD

If an error was made when entering a payment record, that record must be zeroed out and the associated invoice must be voided. A new payment record must then be entered using the steps outlined earlier in this document.

To carry out the portions of this process for zeroing out the payment record and voiding the invoice, complete the following steps:

1. From the *AWARDS Opening Menu* page, click **Fiscal/Program**. The *Fiscal/Program Reports Menu* page is displayed.
2. Click **BillingBuilder**. The *BillingBuilder Menu* page is displayed.
3. Click **Consumer Billing Dashboard**. The *Consumer Billing Dashboard – Select Programs* page is displayed.

4. Click the **Program** drop-down arrow and select the program associated with the client for whom the payment record is to be worked with.
5. If the client for whom the record is to be worked with is a former (discharged) client, click the **Roster Archives** check box.
6. Click **CONTINUE**. The *Consumer Billing Dashboard – Select Client* page is displayed.
7. Click the **Client** drop-down arrow and select the client for whom the payment record is to be worked with.
8. Click **CONTINUE**. The *Consumer Billing Dashboard* page is displayed.

This page contains a list of any previously entered in person payments for the selected client, as well as buttons to view additional client information.


9. Click the **Action** radio button next to the payment that needs to be zeroed out.
10. Click **Update**. The *Consumer Billing Dashboard – Edit Payment* page is displayed. →
11. Click the **Void Payment and Invoice** radio button.
12. Click **CONTINUE**. The payment record is zeroed out, the associated invoice is voided, and a confirmation is then displayed letting you know that the process is complete.

The process of zeroing out a payment and voiding an invoice is now complete.

## ADDING A PAYMENT OR MAKING A PAYMENT TOWARD AN OUTSTANDING BALANCE

If it is necessary to add a payment to an existing payment record, or if you need to record a payment toward an outstanding balance, those data entry tasks must be completed using the Payments/Adjustments component of the AWARDS A/R Menu feature. To use that feature to carry out either task, complete the following steps:

1. From the AWARDS *Opening Menu* page, click **Fiscal/Program**. The *Fiscal/Program Reports Menu* page is displayed.

2. Click **BillingBuilder**. The *BillingBuilder Menu* page is displayed.
3. Click **Manual Payments/Adjustments**. The *Payments/Adjustments* program selection page is displayed.
4. Click the **Program** drop-down arrow and select the program associated with the client for whom the payment is to be entered.
5. If the client in question is a former (discharged) client, click the **Roster Archives** check box.
6. Click **CONTINUE**. The *Payments/Adjustments* client selection page is displayed.
7. Click the **Select Consumer** drop-down arrow and select the client for whom the payment is to be entered.
8. Click **CONTINUE**. The *Payments/Adjustments* data entry page is displayed. 
9. Configure the fields and options on this page as follows:
  - **Transaction Type** – This option can be left at its default value – “Payment.”
  - **Fiscal Period** – Click this drop-down arrow and select the fiscal period in which the payment was made.
  - **Transaction Date** – The transaction date defaults to today. Make changes to that date as necessary (using mm/dd/yyyy format).
  - **Transaction Amount** – In this field, enter the payment amount.
  - **Amount Applied** – In the **Amount Applied** field next to the relevant invoice, enter the payment amount.
10. Click **CONTINUE**. A confirmation page is displayed.
11. Click **CONTINUE** to post the transaction. The outstanding balance is then reconciled.

Payments/Adjustments

Consumer: Amigo, Figo    Current Balance: 50.00

Transaction Type:	Payment
Fiscal Period:	
Transaction Date:	03/24/2010
* Transaction Amount:	0.00

Invoice Number	Date	Program	Invoice Amount	Balance Due	Amount Applied	Reason/Type
00119554	03/05/2010	Test Residential Program		0.00	0.00	
00119568	03/24/2010	Test Residential Program	50.00	50.00	0.00	

\* Transaction Amount: Payments are normally (+).  
Adjustments which lower the balance are normally (-).  
To adjust an invoice balance to zero, enter a negative amount equal to the invoice balance in both places.

The process of entering a payment for an existing record is now complete.

## FREQUENTLY ASKED QUESTIONS

The following frequently asked questions regarding the In Person Payments component of the BillingBuilder can be a useful reference when you have your own questions about the functionality.

### CAN THE CONSUMER BILLING DASHBOARD BE USED TO RECORD MULTIPLE PAYMENTS TOWARD A SINGLE SERVICE?

The Consumer Billing Dashboard can only be used to make the first payment (using the “Entering Co-pay Amounts” process described on page 1, or the “Entering Self-Pay Amounts” discussed on page 4). All subsequent payments must be reconciled through A/R as detailed under “Adding a Payment or Making a Payment Toward an Outstanding Balance” on page 7.