

Bulk Billing

Bulk Billings are third party billings where patient charges are billed to a third party instead of the patient. In Vision, there are 2 types of Bulk Billing: Patient Rebate and Non-patient Rebate:

Non-Patient Rebate

If the department often pays for the full amount, and the patient rarely needs to pay for any part of it. This usually applies to departments paying for consultation fees, e.g. Medicare, Veterans Affairs Consultation (V) or departments for screening test etc

1. Go to Bulk Billing Accounts under Financial, enter a New record leaving "Patient Rebate" blank or "N". For example, "V" for Veterans-Consultation (which is already setup in Vision)

Account Code	V
Vision Description	Veterans - Consult
Patient Rebate	N

2. Go to Item No Details under Maintenance, enter records such as:

Paid By	V
Item No	10900
Description	Initial Consultation
Tax %	<i>(enter the Tax % if it is a taxable item)</i>
Amount – Inc Tax	\$50
Report Grouping	Consult

If the Item numbers and fees of the account are the same as another account whose item numbers are already set up, instead of setting them up all over again, you can set up to use the item numbers from a different account. To set up this way, go to Bulk Billing Account and enter "Use Item No from". For example, the Veterans consultation item numbers and fees are the same as the Medicare ones. Then instead of setting all the items again, enter "M" for "Use Item No from" under Bulk Billing Accounts.

3. After entering the Consultation Item Number in the Consultation screen, you can create a Consultation Billing by pressing Ctrl M for Medicare and Ctrl D for Veterans. (Alternatively, you can manually enter the consultation charge in the Billing screen.)

By	Item No	Health Fund Description	Amount \$
		Patient Opening Balance \$	0.00
V	10900	Initial Consultation	50.00
		Patient Closing Balance \$	0.00



The charge will go directly into the Bulk Billing Account rather than the patient. If required, you can print the “Bulk Billing Account” for that patient from the patient’s Billing screen.

4. The billing amount will then be accumulated in Bulk Billing (not Banking), which you can print a “Tax Invoice / Statement” in Transaction of Bulk Billing/Payments (under Financial).

Note: If this Statement is to be printed, make sure the Item Number is not too cryptic. The Item Numbers have to be meaningful enough for the department to understand (e.g. Screening, not just S), because only the Item Number will get printed in this Statement.

Patient Rebate

If the department rarely pays for the full amount, and the patient often needs to pay for the gap. This usually applies to departments paying for spectacles.

1. Go to Bulk Billing Accounts under Financial, enter a New record with “Patient Rebate” = “Y” e.g.

Account Code	SS
Vision Description	Spectacle Scheme
Patient Rebate	Y

Important:

Do not change a Bulk Billing Account from Non-Patient Rebate to Patient Rebate, or vice versa. Set up a new account with different account code instead.

2. Go to Item No Details under Maintenance, enter New records for rebates, e.g.

Paid By	SS	SS
Item No	FRAME	BF
Description	SS Rebate for Frame	SS Rebate for Bifocal Lenses
Tax %	10	0
Amount	\$33	\$50
Quantity	1	1
Report Group	FRAME	LENS

3. For Frames, go to Inventory, then Frame Details. If there are contract frames that are sold only at contract prices, just enter them at the contract prices. But if those frames can also be sold to normal patients at a higher price, enter them at the higher price for normal patients. In the Colour box, you can enter in the contract price as a note (e.g. Red SS55).
4. For Lenses, go to Maintenance, then Lens code Setup – Spectacle, click onto List to select a Lens Code that you will also sell as contract lenses. Then click New and select “New Spectacle Lens Code – Same details”. Make up a code beginning with a letter such as SS for (e.g. SSBFCR28). Change the Retail Price to what you will receive from SS. Leave the Item No as the normal health fund ones, e.g. 311, 312 etc.
5. For Extras, go to Maintenance, then Lens Extra for Tinting, Coating, Hardening and Case etc, Create codes beginning with a letter such as SS (e.g. SSTINT). Enter the charges to what you will receive from SS. Use the normal health fund Item numbers, e.g. 631, 632 etc. For spectacle case, e.g. Extra Code SSCASE, use Item number such as CASE (you can create this Item No in Maintenance – Item No Details with Report Grouping MISC)

6. Create a Spectacle record:
 - For Frame, if a contract frame with normal sale price is selected, change the charge to the contract price by looking up the note after the frame colour.
 - For Lens Codes, select the SS lenscodes or normal codes depending on whether the patient is selecting contract lenses or normal lenses.
 - For Extras, also enter SS extra codes (if any)
 - Before saving the Spectacle record, making sure the Total Charge of the Spectacle record is the total charges that you will be receiving from both the Bulk Billing Department and the patient.

7. After saving the Spectacle record and create the Billing as usual, i.e. all amount charges to the patient first e.g.

By	Item No	Health Fund Description	Tax %	Amount \$
PF	110	Spectacle Frame	10	233.00
PL	312	Bifocal Lenses		50.00

8. Then, in the next line of the same bill, enter in the Bulk Billing Patient Rebate (SS), which will come up as negative figures. If the patient selects contract frame and contract lenses, the Rebate amounts will be exactly the same as the charges, hence leaving a nil patient balance. If the patient select a non-contract frame or non-contract lenses, there will be a balance for patient to pay:

By	Item No	Health Fund Description	Tax %	Amount \$
PF	110	Spectacle Frame	10	233.00
PL	312	Bifocal Lenses		50.00
SS	FRAME	SS Rebate for Spectacle Frame	10	- 33.00
SS	BF	SS Rebate for Bifocal Lenses		- 50.00
Patient Closing			Balance \$	200.00

“Account Statement” can be printed from the patient’s Billing or Payment screen.

Important:

If the Patient Rebate is entered in a different bill to the bill where the original charges are, at the top right hand corner of the Bill of the Rebate, you must “Link this Discount/Rebate to Bill”, by entering the Billing Number of the original bill of the charge (You can press F5 or right-mouse click for the Pick List).

9. The Rebate amount will then be accumulated in the Bulk Billing (not banking), which you can print a Tax Invoice / Statement in “Transaction” of Bulk Billing/Payment (under Financial).

To send in a Bulk Billing

1. Click onto Financial. Then Bulk Billing/Payment and select the type of Bulk Billing.
2. Click onto the Transaction button to check if all the bills are correct (such as patient names, amount and GST). Then get out of the Bulk Billing Transaction screen
3. At the Bulk Billing screen, check the Total Billing amount and GST are correct and then click onto “Close Period” and enter in the number of the claim form.

Optional: From the Bulk Billing Transaction screen, you can print the Tax Invoice / Statement of the list of bulk bills.

To enter a Bulk Billing Payment

1. Click onto Financial. Then Bulk Billing/Payment and select the type of Bulk Billing.
2. Click onto List or Prev to select the correct Bulk Billing Period.
3. Click onto Transaction to check if each payment amount is the same as the billing amount. If not, you need to go to the patient to adjust the amount first (refer to notes on Adjust Bulk Billing). If all the amounts in the Transaction are correct, exit out of the Transaction list.
4. Click onto Payment, and then New Payment. A Bulk Billing Transaction list will be displayed.

Important: When you are entering a new payment, always click “New Payment”, do not do it by just modifying an old payment record.

5. In the list, tick the ones the payment is for, or click “Mark all Transactions as Paid” if the payment is for all transactions, or “Mark all Transactions as Paid for 1 Provider” if the payment is for all transactions of 1 provider.

Important: Only tick the transaction if the amount is the exact amount it is paid for. If not, you must go back to the patient to adjust the amount first (refer to notes on Adjust Bulk Billing). Do not just modify the amount in the Bulk Billing Transaction List.

6. Then click “Save Changes”. The total of the transactions ticked and their GST will be displayed in the Bulk Billing Payment screen.
7. In the Bulk Billing Payment screen, enter the Optometrist Code, Payment Type, Cheque No etc. Then Save. *(The default Payment Type, and the Bank and Branch of Cheque can be set up in Bulk Billing Account screen under Financial.)*