# Guide to using the Patient Billing App
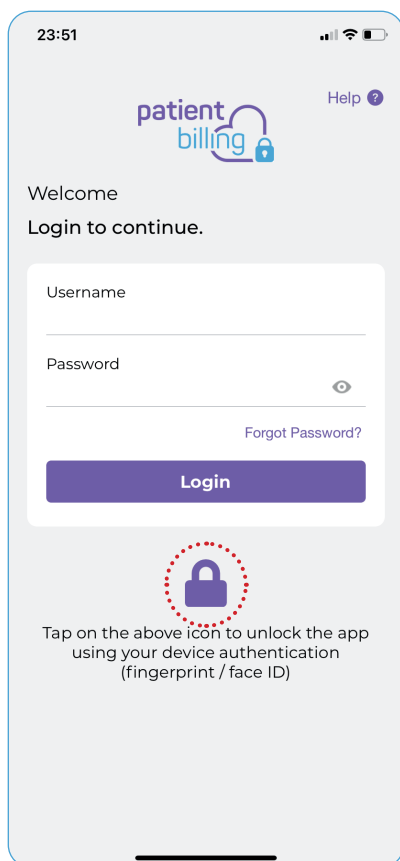
**patient billing**

## Login Screen

Log in to the app using the same username and password that you use to log in to our web portal.

If you have Face ID or Touch ID on your phone you can set it up to log in to the app going forward.

Just click the **Lock** 🔒 icon to activate your Face ID or Touch ID.

23:51

Help ?

**patient billing**

Welcome
**Login to continue.**

Username

Password 👁

Forgot Password?

**Login**

🔒

Tap on the above icon to unlock the app
using your device authentication
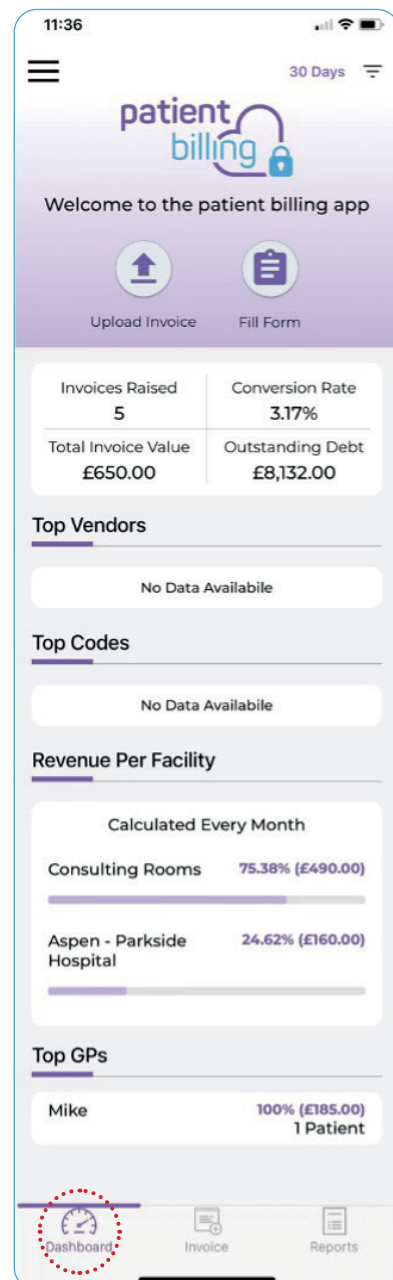(fingerprint / face ID)

**PLEASE NOTE**

The first time you log in to your account via either our web portal or app you will be asked to change your password for your own security.
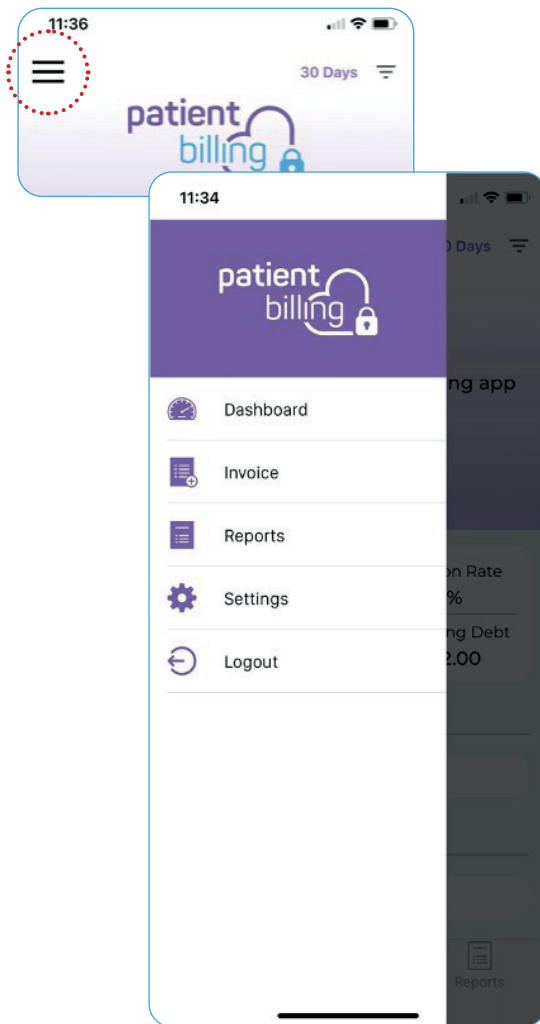
## Dashboard Screen

Your Dashboard shows a live overview of your practice's billing.

Access your Dashboard at any time by clicking on the **Dashboard** 🕐 icon at the bottom of any screen.

11:36                                    30 Days

**patient billing**

Welcome to the patient billing app

⬆ Upload Invoice          📋 Fill Form

| Invoices Raised | Conversion Rate |
|---|---|
| 5 | 3.17% |
| Total Invoice Value | Outstanding Debt |
| £650.00 | £8,132.00 |

**Top Vendors**

No Data Availabile

**Top Codes**

No Data Availabile

**Revenue Per Facility**

Calculated Every Month

Consulting Rooms          75.38% (£490.00)

Aspen - Parkside Hospital          24.62% (£160.00)

**Top GPs**

Mike          100% (£185.00)
1 Patient

Dashboard          Invoice          Reports

# Menu Screen

Access the **Menu screen** anytime by clicking on ☰ at the top left of the screen.

# Choose the Time Period to View Data

To choose the **Time Period** to view your data (invoices, revenue, outstanding debt etc) click on ☰ at the top right of the screen.
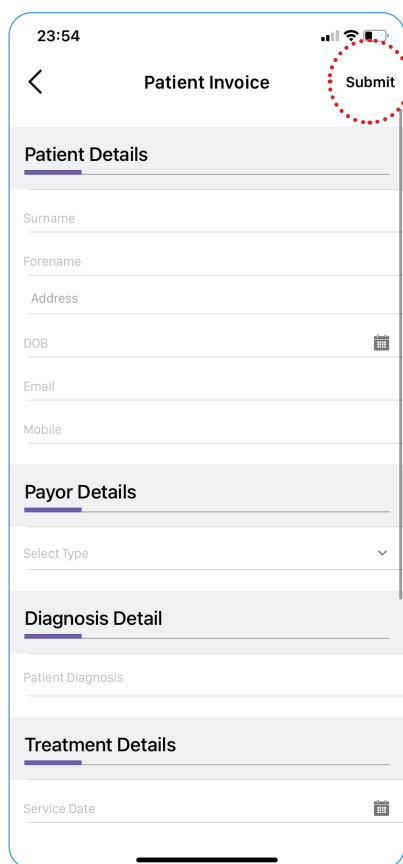
patient
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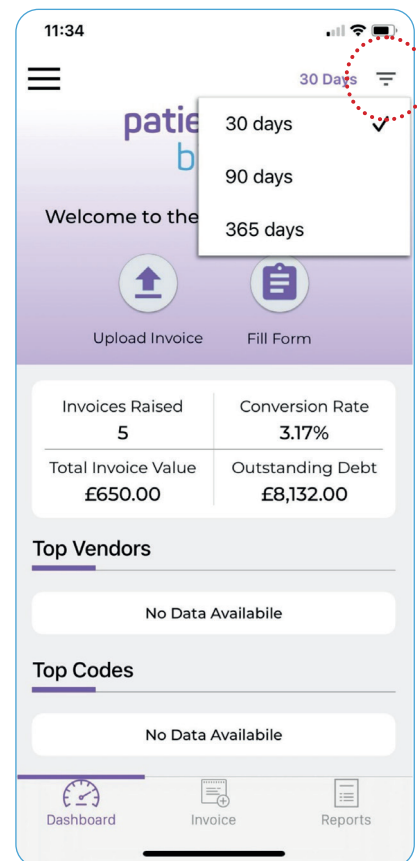
# Submit Details for an Invoice

## Option 1

On the Dashboard click **Fill Form** 📋 at the top.

Add details on the form to raise a new invoice then click **Submit**.

## Option 2

On the Dashboard click **Upload Invoice** ⬆ at the top.

Take a photo of your notes or select a photo from your phone. Please use the **Comment Box** to include additional information such as service/billing code, fee etc. Follow the instructions on the screen then click **Submit**.
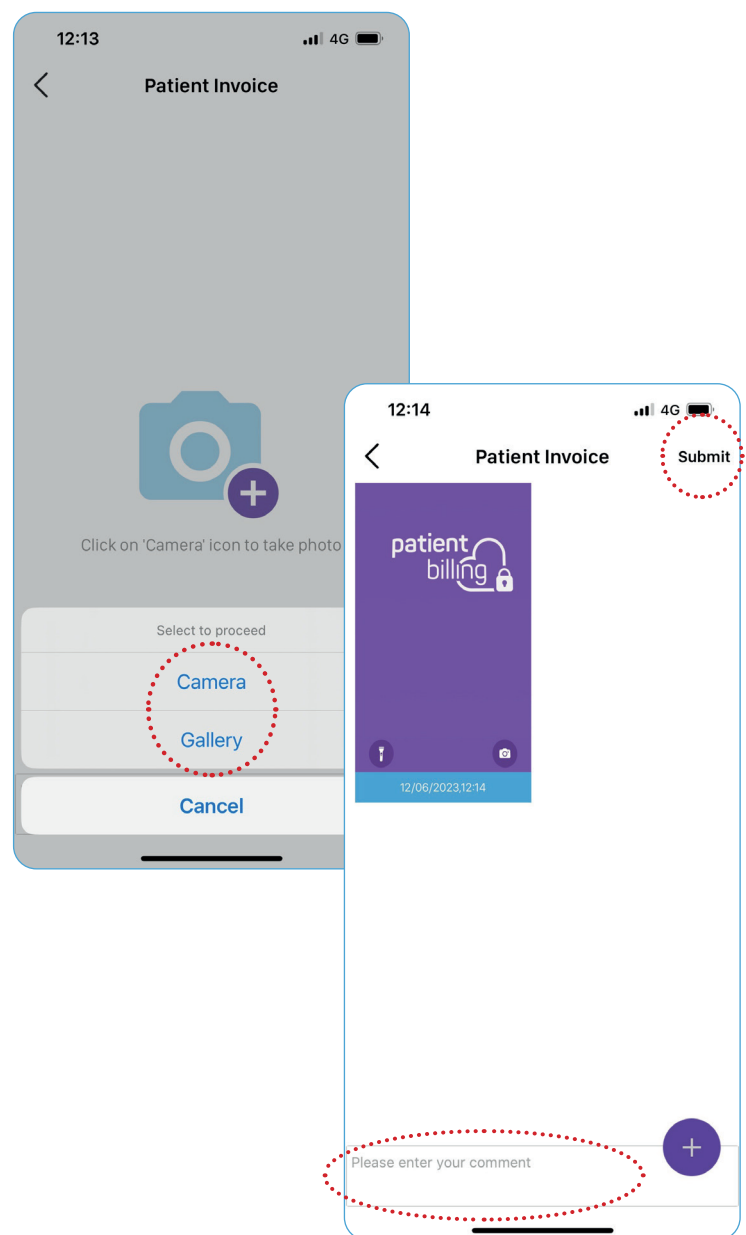
# View Invoice Submissions

Select Invoice on the **Menu screen** or click **Invoice** 📝 at the bottom of the screen.

This will show data for all the invoices previously uploaded.

# View Reports

Select **Reports** on the **Menu screen** or click **Reports** 📄 at the bottom of the screen.

This will show the monthly reports for your account for the last 365 days. These include invoices issued and payments received.
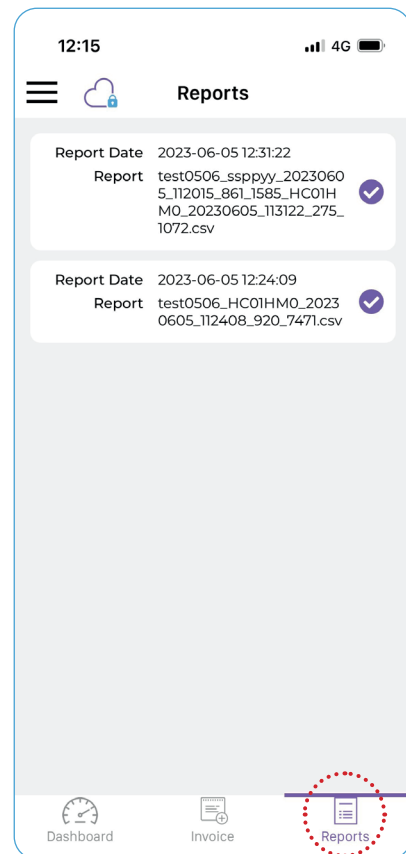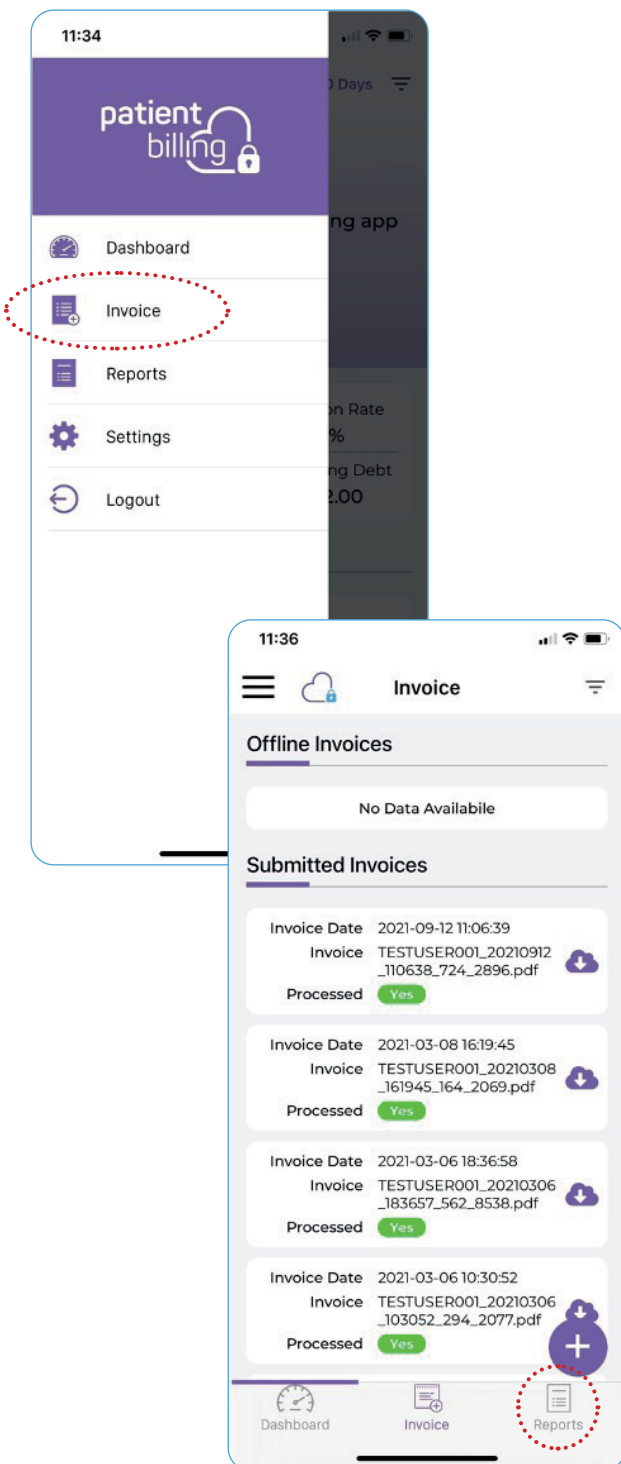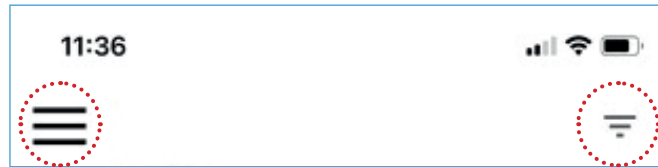
# Notifications

If you would like to receive **Push Notifications** to advise you when your latest report is ready, you will be prompted during your initial log in.
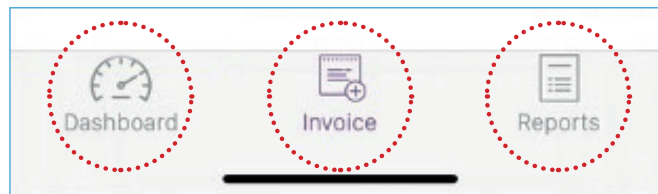
You can also set this up on the **Settings** screen within the App, accessed via the **Menu screen**.

# Notes



**Menu** icon appears top left of the screen. Access the **Menu screen** anytime by clicking on it.

**Calendar** icon appears top right of the screen. Choose the time period you wish to view data for (invoices, revenue, outstanding debt etc).



**Dashboard** shows a live overview of your practice's billing.

**Invoice** shows data for all the invoices previously uploaded.

**Reports** show the monthly reports for your account for the last 365 days.

**PLEASE NOTE**

**Conversion rate** refers to the number of patients who have been admitted to hospital for further investigation or treatment.

**All transfers of data are encrypted and secure.**



If you require further support for using our online services or to book a demonstration of how the app works, please email Rob Walker **rwalker@patientbilling.co.uk**