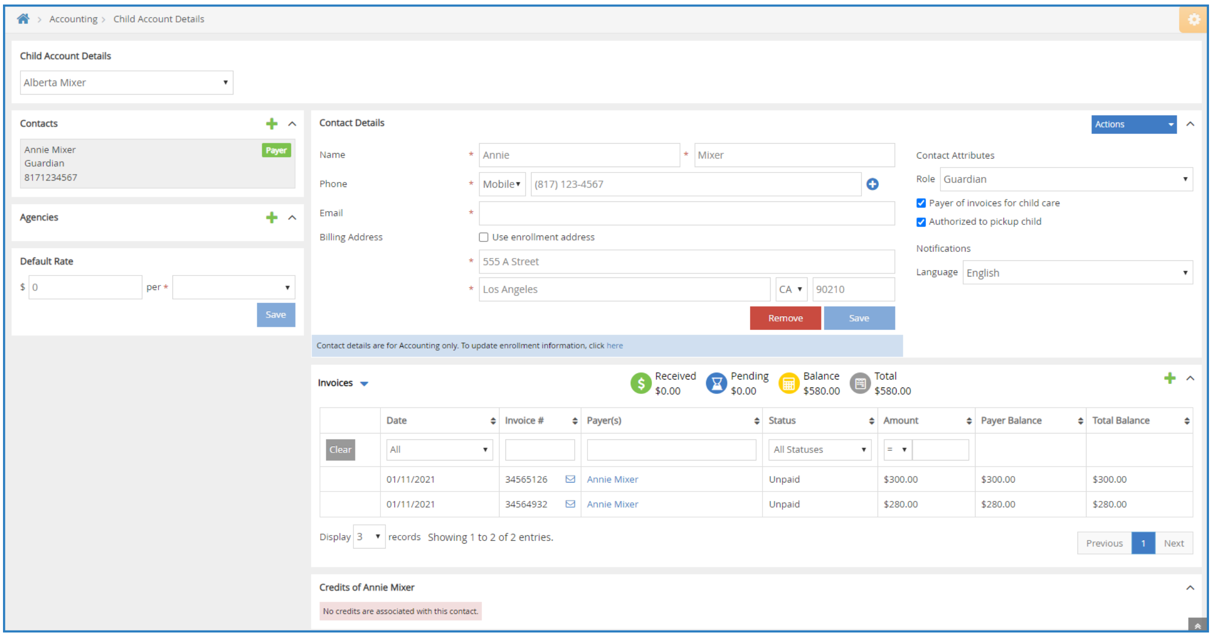
Manage Invoices on Participant Accounts

Last Modified on 02/13/2023 1:53 pm CST

The Participant Account Details page lists all invoices associated with the selected participant, so you can see which invoices are outstanding, paid, and so on. A total account balance also displays above the invoice table, giving you a snapshot of the participant's account status. This includes the total received, and pending amounts, as well as the account balance and account totals.

1. From the menu to the left, click **Accounting**.
2. Click **Accounts**. The Participant Account Details page opens and displays information for the last participant you viewed.
3. Click the drop-down menu at the top of the page and select the participant for whom to view invoices.



4. Scroll to the **Invoices** section. If this section does not display, click to expand it.

   The following columns display:

   - Date
   - Invoice #
   - Payer(s)
   - Status
   - Amount
   - Payer Balance
   - Total Balance

5. Click and select **Recurring Invoices** to view any recurring invoices associated with this participant account.

   The following information displays for recurring invoices:

   - Payer(s)
   - Frequency
   - Amount
   - Next Invoice Date

    - Status
6. You can filter invoices and recurring invoices by each column. Simply use the drop-down menus to filter, or type in the text boxes.
7. Click each column header to sort in ascending or descending order.
8. Click **Previous** and **Next** to navigate between pages of invoices.
9. Click the **Display** drop-down menu to change the number of invoices that display by default. You can select **3**, **10**, **20**, **50**, or **100**.
10. Click  to add an invoice from this page. For more information, see **Create an Invoice**.

Note: As of 2/8/2023 a new option will be added to the Settings section of Accounting that allows Providers to enable Payer permissions by default. In the settings section it will have a check box next to “Payer Permission access granted by default”. All providers who enable Accounting after 2/8 will have this box checked automatically. **All Providers with Existing accounts will not have this box checked automatically but will have the ability to check the box and enable the setting.**