

NON-BILLABLE PRODUCTS/PRODUCT INVENTORY



Add new visit/edit visit

If enrolled with Chase Paymentech for Credit Card processing you now have the ability to add non-billable products and services to your visits in Practice Mate. If not enrolled, simply contact our Office Ally Payment Experts at 888.849.2058 for a free statement analysis and quote.

Adding Non-Billable Products/Services to a Visit

- From the Patient Visit tab
- Click on Add New Visit or click Edit for an existing visit
- Click on the Billing Info tab
- Located under the Date of Service line items click on Non-Billable Products/Services

non-billable products / services

Date of Service	Product Code	Description	Qty	Unit Price	Line Charges	Ins. Paymt	Patient Paymt	Adj. Balance	Del
									X
									X
									X
									X
									X
									X
Total:				0.00				0.00	

- Click on the browse button to select a product or service to add to this visit.
- Note - Creating the Product Inventory List will be discussed later in these instructions

Product Inventory List - [Show All]

ProductCode

Starts With

Category: -- All --

Office: -- All --

Search

Show All


Select	Product Code	Description	Category	Qty On Hand	Unit Price	Location
Select	00123	Herbs	Herbs	9.00	25.00	
Select	6587	Elbow Brace	Braces	-1.00	75.00	
Select	A123	test	Braces		0.00	
Select	A2587	Vitamin E	Supplement		10.00	
Select	SUP00002	Melatonin, 100 Lozenges	Herbs	20.00	8.19	Shelf
Select	SUP0001	Iron - Floradix Iron + Herbs	Vitamins	25.00	32.97	Shelf

- Edit the Quantity and or the Date if applicable

non-billable products / services										
Date of Service	Product Code	Description	Qty	Unit Price	Line Charges	Ins. Paymt	Patient Paymt	Adj.	Balance	Del
8/27/2008	SUP00002	Melatonin, 100 Lozenges	1	8.19	8.19				8.19	X
8/27/2008	SUP0001	Iron - Floradix Iron + Herbs	4	32.97	131.88				131.88	X
8/27/2008	A2587	Vitamin E	2	10.00	20.00				20.00	X
8/27/2008	6587	Elbow Brace	1	75.00	75.00				75.00	X
8/27/2008	00123	Herbs	1	25.00	25.00				25.00	X
										X
Total:				610.07		0.00	0.00	0.00	610.07	

- Click Update to create the visit
- Note - You will be able to Add and Apply payments for Non-Billable Products/Services the same way you do for regular patient or insurance payments
- Note - Any Non-Billable Products/Services linked to a visit will only be used for accounting and inventory purposes and will not be included on the claim to the insurance company

Creating/Editing a Product or Service Inventory List


- From the Mange Office tab
- Click on Product Inventory
- Click on Add New or Edit  to create/edit a product/service

Product Inventory List - [Show All]							
<div>  <div> Search For: Product Code Starts With <input type="text"/> </div> <div> Reports </div> <div> Add New Search Show All </div> </div>							
Product Code	Description	Category	Qty On Hand	Unit Price	Edit	Qty	Delete
00123	Herbs	Herbs	9.00	25.00			X
6587	Elbow Brace	Braces	-1.00	75.00			X
A123	test	Braces		0.00			X
A2587	Vitamin E	Supplement		10.00			X
SUP00002	Melatonin, 100 Lozenges	Herbs	19.00	8.19			X
SUP0001	Iron - Floradix Iron + Herbs	Vitamins	25.00	32.97			X

ID:
 Product Code:
 Description:
 Category: Braces
 UOM:
 Unit Cost:
 Unit Price:
 Qty On Hand:
 Min Qty:
 Max Qty:
 Location:
 Avg. Lead Time: (days)
 Comments:


- Product Code: Enter a product code for your product/service
- Description: Enter a description for your product/service
- All other fields are optional but may be needed for detailed reporting
- UOM: Unit of Measure
- Unit Cost: Enter the amount you pay for this product/service
- Unit Price: Enter the amount you charge for this product/service
- Qty on Hand: To add to this field you will need to adjust the product/service – discussed in the next section
- Min Qty: Enter the minimum amount of this product/service you want to keep in inventory
- Max Qty: Enter the maximum amount of this product/service you want to keep in inventory
- Location: Enter the location of this product/service
- Avg. Lead Time: Enter the amount of time it takes to have product/service shipped to you
- Comments: Enter as applicable
- Click Update to save

Product Quantity Receiving/Adjustment

- You will want to adjust the quantity of any product/service when you receive new shipments of products so that your quantity on hand and reporting will be accurate
- From the Product Inventory List
- Click the Quantity  button for the Product/Service you want to adjust

Product Inventory List - [Show All]							
 Search For: Product Code <input type="button" value="Starts With"/> <input type="text"/> <input type="button" value="Reports"/> <input type="button" value="Add New"/> <input type="button" value="Search"/> <input type="button" value="Show All"/>							
Product Code	Description	Category	Qty On Hand	Unit Price	Edit	Qty	Delete
00123	Herbs	Herbs	9.00	25.00			
123	123	Braces		0.00			
6587	Elbow Brace	Braces	-1.00	75.00			

Inventory - Product Quantity Receiving/Adjustment



ID: 1000029

Product Code: SUP00002

Description: Melatonin, 100 Lozenges

Qty On Hand: 19.00

Location: Shelf

Date Received(mm/dd/yyyy): 8 / 27 / 2008

Qty:

PO No.:

Notes:

- Date Received: Edit the date to reflect the date you received the new products
- Qty: Enter the quantity of the products you received
- PO No.: Enter a Purchase Order number if applicable
- Notes: Enter as applicable

Reports

- From the Product Inventory List you can choose from three reports
- Product Inventory Report
- Product Inventory Transactional Report
- Product Inventory Physical Report

Product Inventory List - [Show All]



Search For: Product Code Starts With

Reports

- Product Inventory Report
- Product Inventory Transactional Report
- Product Inventory Physical Report

Product Cod			Qty On Hand	Unit Price	Edit	Qty	Delete
00123	Herbs	Herbs	9.00	25.00			
123	123	Braces		0.00			
6587	Elbow Brace	Braces	-1.00	75.00			
A123	test	Braces		0.00			
A2587	Vitamin E	Supplement		10.00			
SUP00002	Melatonin, 100 Lozenges	Herbs	29.00	8.19			
SUP00001	Iron - Floradix Iron + Herbs	Vitamins	25.00	32.97			

- Click on Product Inventory Report
- Select filters for category, quantity on hand and sort by
- Once the filters are selected click Go

Product Inventory Report

Filters: Category: -- All -- Qty On Hand: -- Any -- Sort By: Product Code **Go**

1 of 1 100% Find | Next Select a format Export

Report Date: 8/28/2008 South Side Medical Page: 1

Product Inventory Report

Product Code	Description	Category	UOM	Location	Qty On Hand	Unit Cost	Ext.Cost	Unit Price	Ext.Price	Min Qty	Max Qty	Comments
00123	Herbs	Herbs			9.00	\$0.00	\$0.00	\$25.00	\$225.00	10.00	20.00	
123	123	Braces				\$0.00	\$0.00	\$0.00	\$0.00	0.00	0.00	
6587	Elbow Brace	Braces			-1.00	\$50.00	(\$50.00)	\$75.00	(\$75.00)	5.00	10.00	
A123	test	Braces				\$0.00	\$0.00	\$0.00	\$0.00	0.00	0.00	
A2587	Vitamin E	Supplement				\$5.00	\$0.00	\$10.00	\$0.00	10.00	20.00	
SUP00002	Melatonin, 100 Lozenges	Herbs		Shelf	29.00	\$7.49	\$217.21	\$8.19	\$237.51	4.00	10.00	Sales Rep - Mary Adams
SUP0001	Iron - Floradix Iron + Herbs	Vitamins		Shelf	25.00	\$25.97	\$649.25	\$32.97	\$824.25	5.00	10.00	wholesalesupplementstore.com
Total:							\$816.46		\$1,211.76			

- Click on Product Inventory Transactional Report
- Select transaction by date, date range or month
- Select filters for product code and transaction type
- Once the filters are selected click Go

Product Inventory Transactional Report

Transactions: By Month 8 2008

Filters: Product Code: (all) Transaction Type: -- All -- **Go**

1 of 1 100% Find | Next Select a format Export

Report Date: 8/28/2008 South Side Medical Page: 1

Product Inventory Transactional Report - For Month: 8/2008

Transaction Date	Product Code	Description	Qty	Transaction Desc.	Ref. No	Notes	By
08/12/2008	6587	Elbow Brace	-1.00	LI New	11773779		mikeb
08/12/2008	00123	Herbs	-1.00	LI New	11773779		mikeb
08/13/2008	00123	Herbs	10.00	Recv/Adj			mikeb
08/25/2008	SUP0001	Iron - Floradix Iron + Herbs	25.00	Recv/Adj	987654321		mikeb
08/25/2008	SUP00002	Melatonin, 100 Lozenges	20.00	Recv/Adj	658354		mikeb
08/25/2008	SUP00002	Melatonin, 100 Lozenges	-1.00	LI New	11797940		mikeb
08/28/2008	SUP00002	Melatonin, 100 Lozenges	10.00	Recv/Adj	925684		mikeb

- Click on Product Inventory Physical Report
- Select filters for category, quantity on hand and sort by
- Once the filters are selected click Go

Product Inventory Physical Report

Filters: Category: -- All -- Qty On Hand: -- Any -- Sort By: Product Code **Go**

1 of 1 100% Find | Next Select a format Export

Report Date: 8/28/2008 South Side Medical Page: 1

Product Inventory Physical Report

Product Code	Description	Category	UOM	Location	Qty On Hand	Physical Count	Qty Adjusted
00123	Herbs	Herbs			9.00		
123	123	Braces					
6587	Elbow Brace	Braces			-1.00		
A123	test	Braces					
A2587	Vitamin E	Supplement					
SUP00002	Melatonin, 100 Lozenges	Herbs		Shelf	29.00		
SUP00001	Iron - Floradix Iron + Herbs	Vitamins		Shelf	25.00		