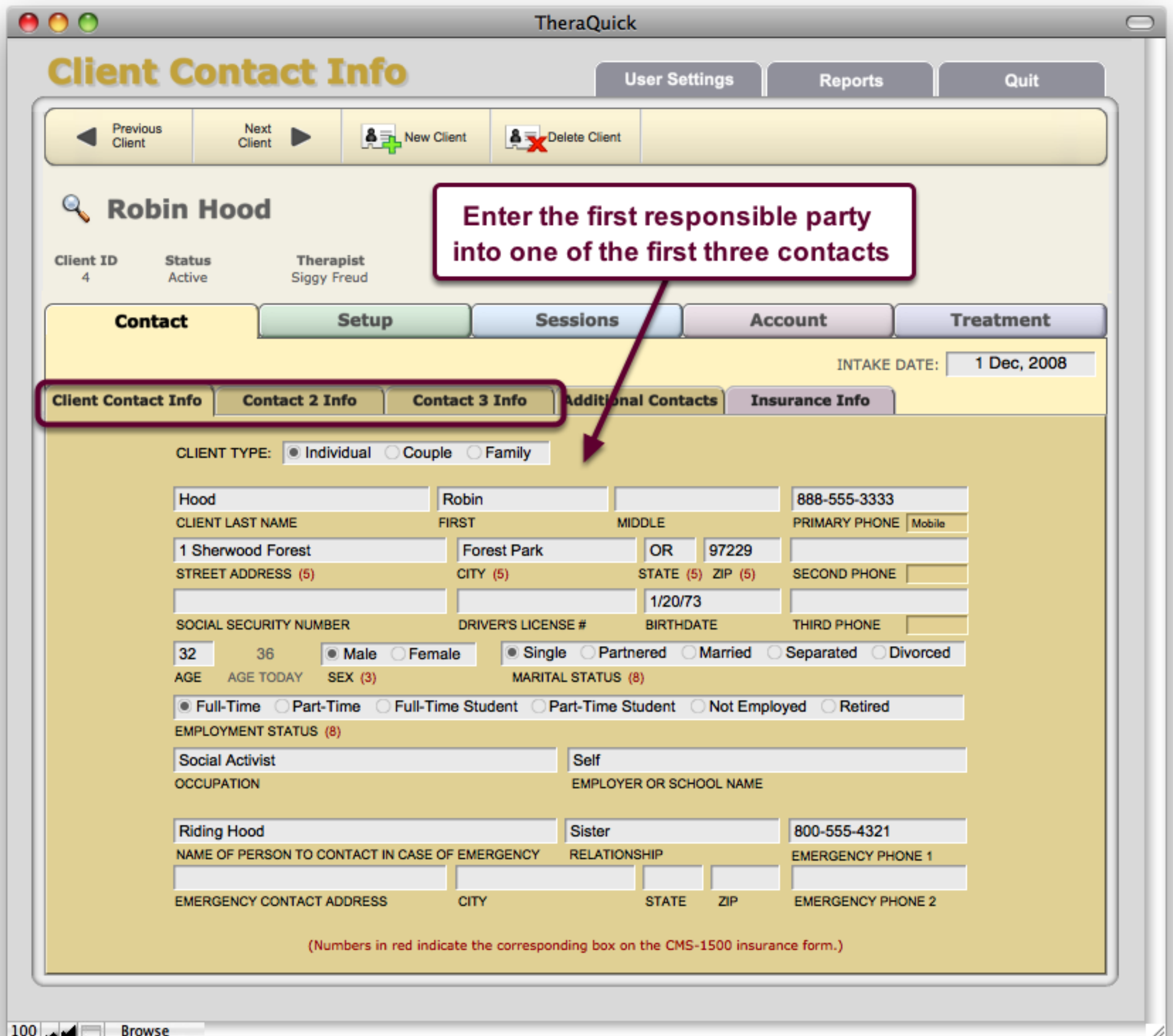
Setting Up a Client With Two Responsible Parties

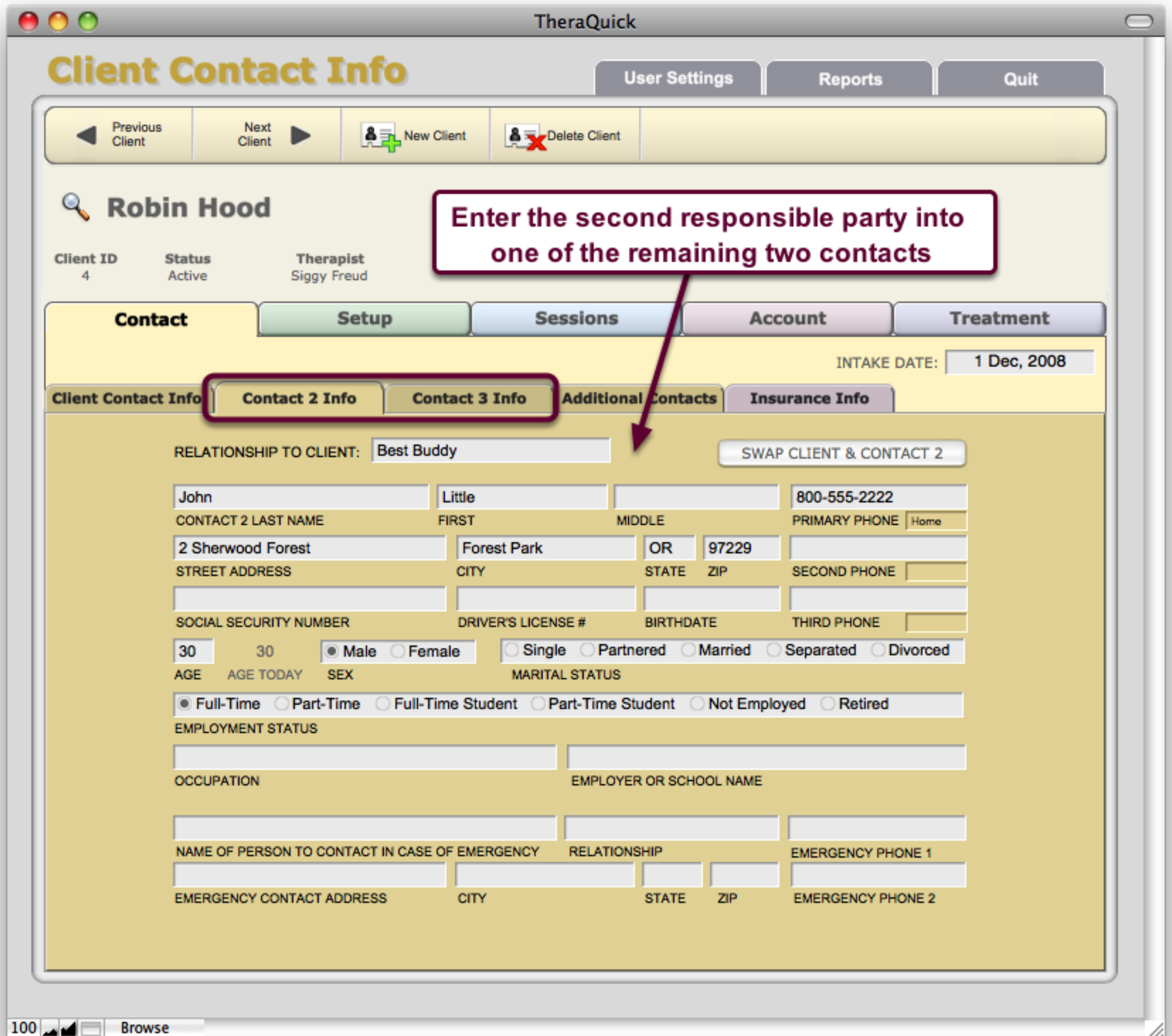
How to setup the billing information for a client who is using two responsible parties to pay for the sessions.

Enter information for the first responsible party under one of the first three Client Contact layout subtabs.



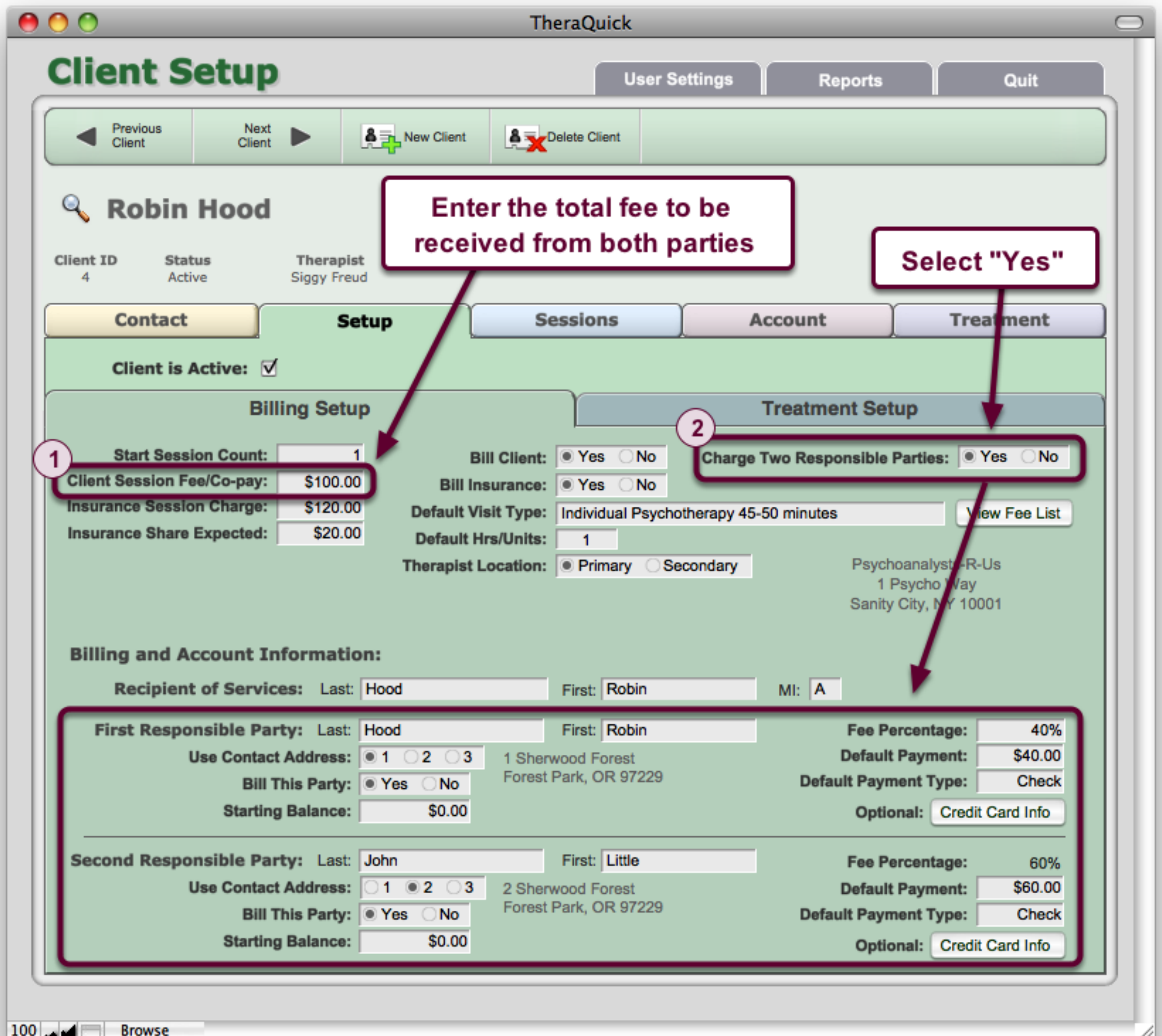
The first responsible party can be any of the contacts entered under the Client Contact Info, Contact 2 Info, or Contact 3 Info subtabs. In this example, the client, Robin Hood, is one of the responsible parties (entered under Client Contact Info).

Enter information for the second responsible party under another one of the Contact subtabs.



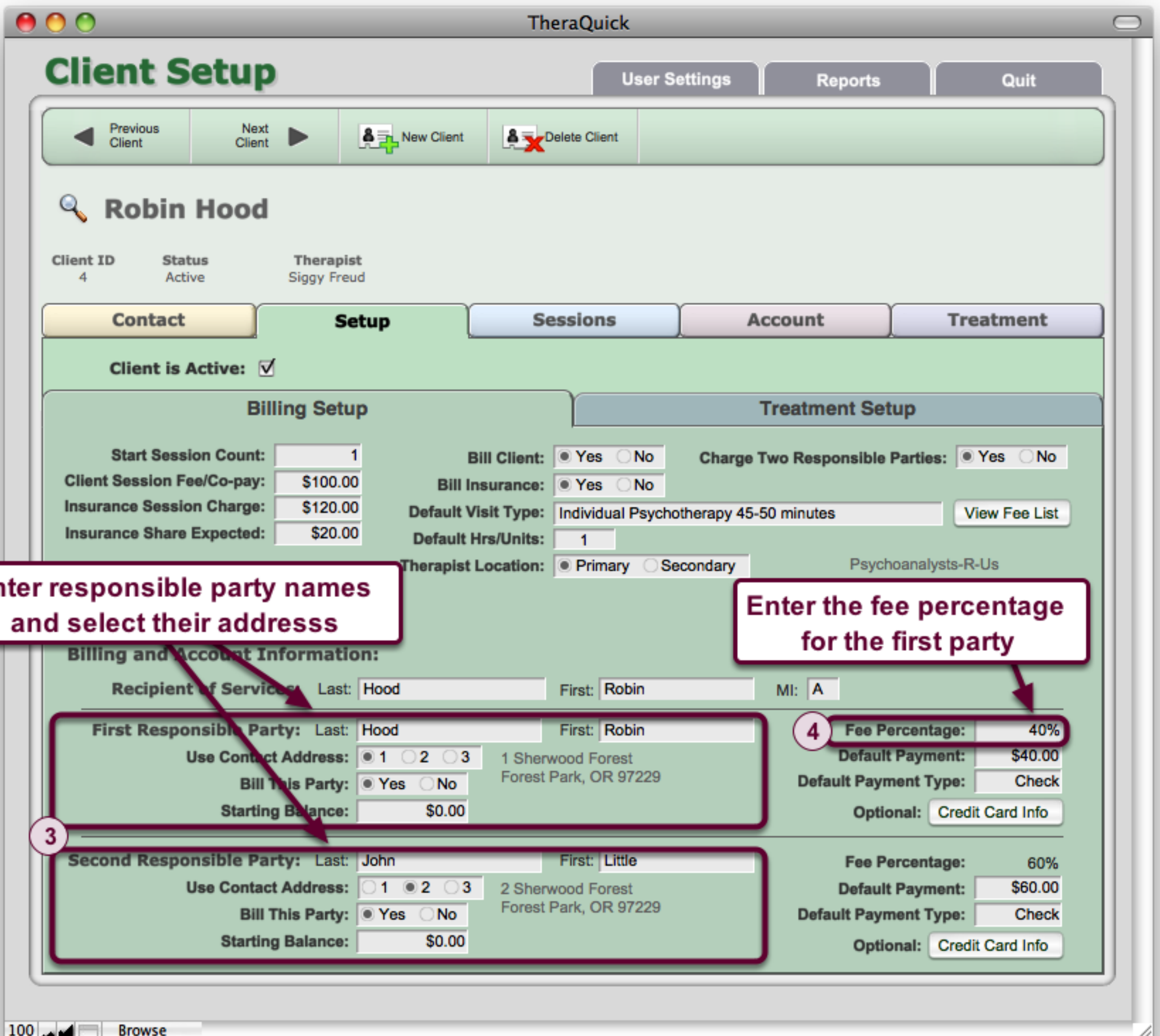
The second responsible party can be any of the remaining contacts under the Client Contact Info, Contact 2 Info, or Contact 3 Info subtabs (other than the contact used for the first responsible party). In this example, the second responsible party is Little John, entered under Contact 2 Info.

Navigate to the Client Setup layout. (1) Enter the amount you will be paid from both parties together in the Client Session Fee/Co-pay field. (2) Select "Yes" for Charge Two Responsible Parties.



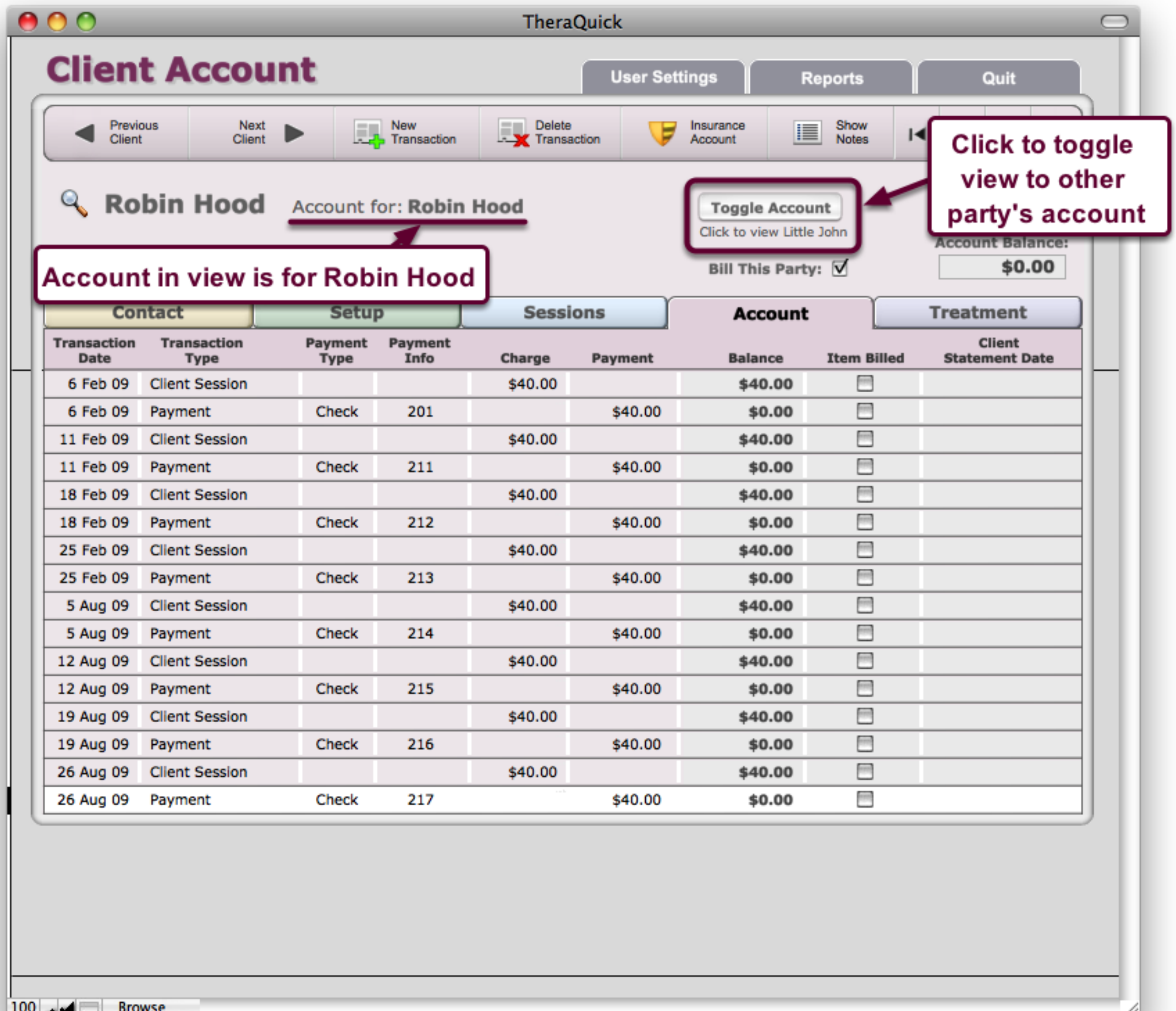
The Client Session Fee/Co-pay is the total amount you will be billing or expecting from both responsible parties together. In this example, the Client Session Fee/Co-pay is $100. When you select "Yes" for Charge Two Responsible Parties, the fields will appear where you can enter details for each party.

(3) Enter the names for the first and second responsible parties, select their contact addresses (if you will be sending billing statements), and (4) enter the fee percentage (as a decimal) into the Fee Percentage for the first party.



Enter the responsible party names in the form you would like them to appear on billing statements, and select their addresses from those entered for the different contacts. You can individually select whether each party will be included in batch billing. Select "Yes" for Bill This Party to include this party in batch billing. Enter the fee percentage for the first party as a decimal. In this example, we've entered .4 (40%) for the first party. The remaining amount is automatically calculated for the second party (60%). Enter optional default payment amounts and types for each party for automated entry when creating charges and payments for client sessions.

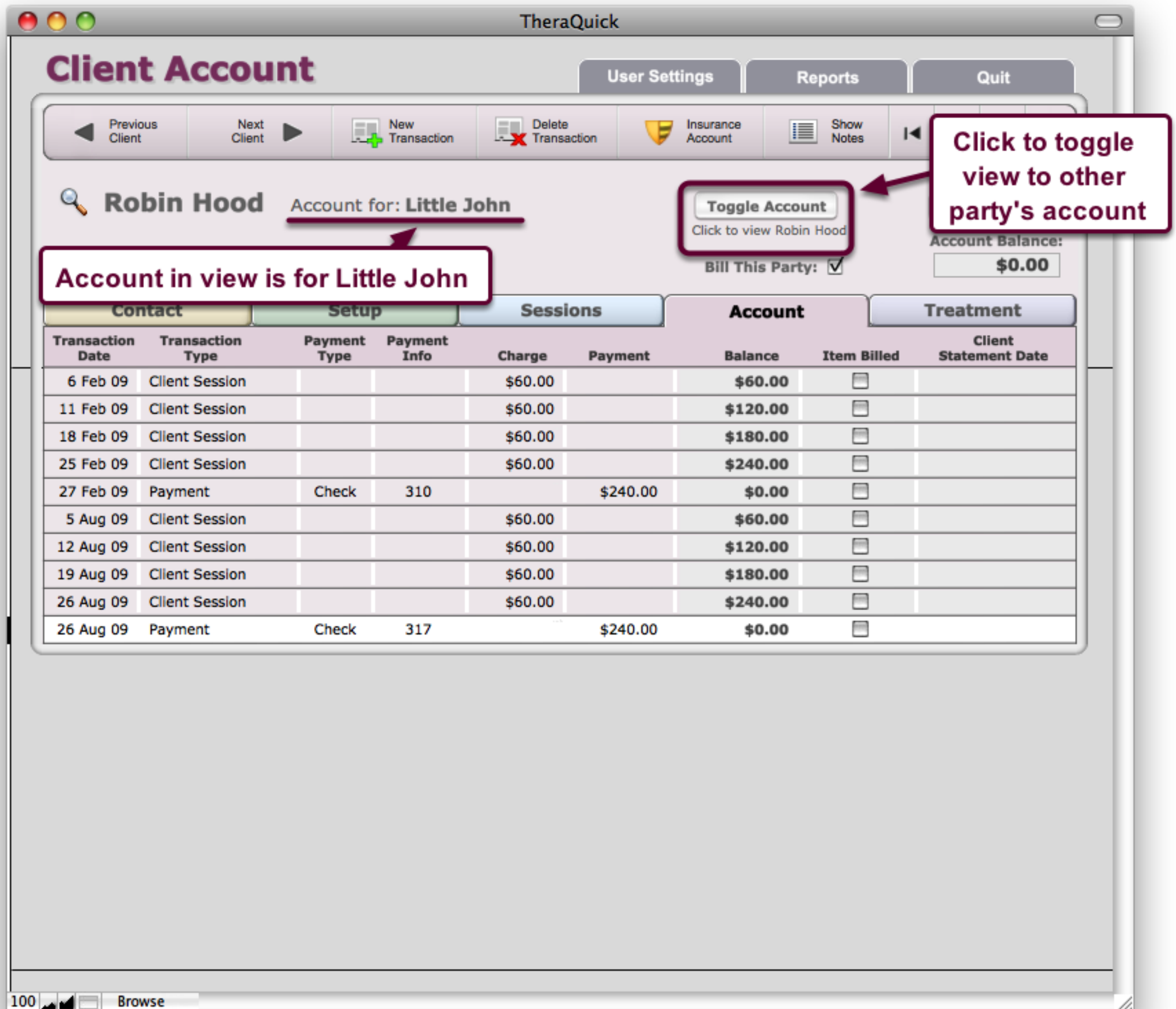
When you create and charge the client sessions, a separate account will be maintained for each responsible party and charges for sessions will automatically be created according to the fee percentage for each party.



Transaction Date	Transaction Type	Payment Type	Payment Info	Charge	Payment	Balance	Item Billed	Client Statement Date
6 Feb 09	Client Session			$40.00		$40.00		
6 Feb 09	Payment	Check	201		$40.00	$0.00		
11 Feb 09	Client Session			$40.00		$40.00		
11 Feb 09	Payment	Check	211		$40.00	$0.00		
18 Feb 09	Client Session			$40.00		$40.00		
18 Feb 09	Payment	Check	212		$40.00	$0.00		
25 Feb 09	Client Session			$40.00		$40.00		
25 Feb 09	Payment	Check	213		$40.00	$0.00		
5 Aug 09	Client Session			$40.00		$40.00		
5 Aug 09	Payment	Check	214		$40.00	$0.00		
12 Aug 09	Client Session			$40.00		$40.00		
12 Aug 09	Payment	Check	215		$40.00	$0.00		
19 Aug 09	Client Session			$40.00		$40.00		
19 Aug 09	Payment	Check	216		$40.00	$0.00		
26 Aug 09	Client Session			$40.00		$40.00		
26 Aug 09	Payment	Check	217		$40.00	$0.00		

On the Client Account layout, a button labeled "Toggle Account" will appear to allow you to view the accounts for the two different responsible parties. In this example, we are viewing the account for Robin Hood, who is set up to be charged a 40% share of the $100 Client Session Fee/Co-pay amount, and he pays in full at the time of each visit. (Note that the Client is Robin Hood, independent of the choice of responsible parties.)

Click on "Toggle Account" to view the account for the other responsible party.



Clicking on "Toggle Account" wil show the account for the second party, Little John in this example. Little John has been charged 60% of the $100 Client Session Fee/Co-pay amount, and has been paying off his balance by check near the end of the month. (Note that the Client is still Robin Hood, independent of the choice of responsible parties.)