

## Running Billing Reports in ALERT IIS

1. Super Users can run billing reports by clicking on “billing report request” in the reports section of the ALERT IIS menu on the left-hand side of the screen.

The screenshot shows the ALERT IIS home page. The left-hand side contains a navigation menu with the following items: Patients (manage patient, enter new patient), Immunizations (manage immunizations), and Reports (reminder / recall, check reminder status, check reminder list, manage custom letters, check request status, vaccine eligibility, check vaccine elig status, group patients, check group status, assessment report, check assessment, benchmark report, check benchmark, ad hoc list report, ad hoc count report, ad hoc report status, **billing report request**, check billing report). The main content area includes a navigation bar with links: home, manage access/account, forms, related links, logout, help desk. Below this is the user information: organization CLINIC 2 - SHELBY'S TEST CLINIC, user Rex Larsen, role Super User (Provider and LHD). There are sections for announcements and release notes. A table titled "Vaccine Order/Transfer Notification ..." shows columns for Type, Shipped, Awaiting Return Shipment, and Rejected. Below that is a table titled "Active Inventory that is Going to Expire or Expired Lots with a Quantity ..." with columns for Site Name, Trade Name, Lot Number, Funding Source, On Hand, and Exp Date.

2. Select the quarter and year needed for the report. Choose an organization from the Use Single Organization drop-down menu. The organization list will include all organizations that you have access to. You must enter something in the VFC Manager and Admin Specialist fields for the report to run; here I have entered an x. Check the boxes next to the “Memo”, “Summary”, and “Detail” to include them in the report. The “Detail” billing report is necessary to view individual patient’s immunization details and to complete a request for credit. Click on the “Generate” button at the bottom.

The screenshot shows the "Billing Report Request" form. The form includes the following fields and options: "Select Report Time Period" with "Quarter" set to "Quarter 2" and "Year" set to "2014"; "Select Billing Organization" with "Use Single Organization" selected and "CLINIC 2 - SHELBY'S TEST CLINIC" chosen; "Enter Memo Presentation Information..." with "VFC Manager" and "Admin Specialist" both set to "x"; "Select Included Reports" with checkboxes for "Include Memo", "Include Summary", and "Include Detail" all checked. The "Generate" button is circled in red.

- You will be redirected to the “Billing Report Status” screen. This screen will display the status of the billing reports that you are running. You may need to click the refresh button for the report to complete. When the report is complete click on “Detail”, “Memo”, or “Summary” to open your billing report.

organization CLINIC 2 - SHELBY'S TEST CLINIC • user Rex Larsen • role Super User (Provider and LHD)

**Billing Reports Status** Refresh Cancel

Report Name	Started	Completed	Status	Period	Organization
<a href="#">DETAIL</a>	2014-10-31 14:41:01.0	2014-10-31 14:41:01.0	100%	Quarter 2 2014	CLINIC 2 - SHELBY'S TEST CLINIC
<a href="#">MEMO</a>	2014-10-31 14:41:01.0	2014-10-31 14:41:01.0	100%	Quarter 2 2014	CLINIC 2 - SHELBY'S TEST CLINIC
<a href="#">SUMMARY</a>	2014-10-31 14:41:01.0	2014-10-31 14:41:01.0	100%	Quarter 2 2014	CLINIC 2 - SHELBY'S TEST CLINIC

**ALERT**  
Production Region 3.8.0

**Patients**  
manage patient  
enter new patient

**Immunizations**  
manage immunizations

**Reports**  
reminder / recall  
check reminder status  
check reminder list  
manage custom letters