

Client billing portal

User guide

August 2024

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Getting started

The client billing portal is a web-based application that allows access to the following:

- Manage user services, includes password and payment profile
- View daily or weekly charge notifications
- View and pay invoices

Client billing portal information

To locate information on the portal, navigate to the Lab billing page on the Allina Health Laboratory website and look for the Client portal tab. The following information can be found:

- This guide, which contains instructions on how to use the portal
- A link to the client portal
- User request form

Helpful tips

- Documents sent by the billing system will be password protected.
- Add <u>AHLOutreach@allina.com</u> to your safe sender list.
- Please use your client/customer code to open the document.
- Invoices and notifications that are emailed are also accessible on the portal.
- The expectation is that the portal is viewed monthly to ensure accuracy of all charges billed and to submit timely payments.

Logging into the client billing portal

To log in to the portal, follow these steps:

1. Click on the link below or enter the URL into the internet browser or access from the Allina Health Laboratory Billing webpage.

https://allinahealth-client.ilabbill.com/Login

Allina Health 💸 Client Portal	
	Login User Name:* Password:* Login

2. Enter User Name and password in the designated fields and click 'Login'.

Home page

Upon successful login, the home page will be displayed. The following options are available: *Note: access granted is based on the information received on user request form.*

- Home
- Pay Online
- Invoice History
- Notification History
- Payment History
- Documents
- Information

Home

Allina Health 👬 Client Portal

Pay Online Invoice History Notification History Payment History Price Inquiry Update Request for Information Documents Census Update Covered Lives Hospice Coverage Entry Information

Welcome to the Client Portal!

This portal allows you to access your invoices and payment history.

For your convenience you can also make online payments via secured credit card processing.

We accept Visa, MasterCard, American Express, and Discover.

Changing your password

When logging in to the client billing portal for the <u>first time</u>, you will need to change your password. To change your password, follow these steps:

1. Under 'Home,' go to the 'User Services' drop-down tab and select 'Change Password'.



2. Highlight existing Password and Confirm New Password fields and delete. Enter new password and confirm new password. *Passwords must be at least 8 characters in length, contain at least one number, one lowercase letter, one uppercase letter, and one special character.*

User Name:* Password:*	user@client.com	Confirm New Password:*	••••••
Password Question:	favorite pet	Password Answer:	dog
	Save	Cancel	

3. Click Save. Your password has been changed successfully.



Reviewing invoices

Invoices are available on the portal in both an Excel and PDF format.

EXCEL FORMAT

First tab - invoice details

A	В	с 🧳	2 D	E	3 F	4) G	н	I	J	К	L
Client Code	Client Name	Billing Date	Invoice#	Revised	Total Balance Due	Current	31 to 60 Days	61 to 90 Days	91 to 120 Days	>120 Days	
XABC	CLIENT NAME	12/31/2022	000111	N	\$950.0	\$0.00	\$700.0	\$50.00	\$100.00	\$100.00	
	100000000000										
	Invoice Detail Charge Detail	Messages	+					- <			

- 1 **Billing Date:** End of month billing cycle
- 2 Invoice #: Invoice number for current month; include this number with payment, for example LAB000111
- 3 Total Balance Due: The amount in this column is the sum of all unpaid invoices.
 - This may not be the amount due for current invoice.
 - Clients are responsible to monitor their invoices and follow up with their Account Representative or Lab Billing as needed for unpaid balances.
- 4 **Current:** Amount due for current month's invoice. If paying monthly, this is the balance due.

Second tab - charge details

	В	2 c	3	(4)	5	6	0	I
Date	Procedure	Description	CPT	Patient	Accession#	Price	Amount	Note
10/20/2022	308415300	PSA TOTAL (DIAGNOSTIC)	84153	Patient, Mickey Mouse 02/08/1945	RQ12345	\$1.00	\$1.00	
11/2/2022	308502500	CBC WITH DIFF	85025	Patient, Mickev Mouse 02/08/1945	RQ12345	\$1.00	\$1.00	
11/2/2022	308413200	POTASSIUM	84132	Patient, Mickey Mouse 02/08/1945	RQ12345	\$1.00	\$1.00	
11/2/2022	308614000	C-REACTIVE PROTEIN	86140	Patient, Donald Duck 01/01/1965	RQ12488	\$1.00	\$1.00	
11/2/2022	308256500	CREATININE	82565	Patient, Minnie Mouse 10/01/1940	RQ00589	\$1.00	\$1.00	
	Invoice Detai	I Charge Detail Messages	+					<

- 1 **Date:** Date of Service
- 2 Description: Description/test name
- 3 CPT: CPT code
- 4 Patient: Patient name and date of birth
- 5 Accession: Accession number/RQ number
- 6 Price: Price per test
- 7 Amount: Total amount charged for test

Note: Payment and adjustment information will be posted on this tab. If you receive weekly charge notifications, please refer to the PDF invoice for charge details

Third tab – Messages



PDF Format

Page 1





DETACH AND RETURN TOP PORTION OF INVOICE WITH YOUR PAYMENT - RETAIN BOTTOM PORTION FOR YOUR RECORDS



INVOICE HISTORY

DATE	INVOICE	CHARGE S	REFUNDS	PAYMENTS	ADJUSTMENTS	BALANCE
12/31/2022	000111	\$5.00	\$0.00 Unapplied:	\$0.00	\$0.00	\$5.00
11/30/2022	000110	\$75.00	\$0.00	\$0.00	\$0.00	\$75.00
10/31/2022	000109	\$10.00	\$0.00	\$0.00	\$0.00	\$10.00
09/30/2022	000108	\$100.00	\$0.00	\$10.00	\$80.00	\$10.00
08/31/2022	000107	\$100.00	\$0.00	\$100.00	\$0.00	\$0.00
					BALANCE	\$100.00



For accounting purposes, please include LAB and the invoice number on your payment.

Thank you for your business! Please remit payment within 30 days.

- 1 Invoice: Invoice number
- 2 Client: Client code
- 3 Invoice Date: End of month billing cycle

4A – Pay this Amount: Accumulative total amount due on account (this may not be the balance due for current month)

4B – Balance: Accumulative total amount due on account (this may not be the balance due for current month)

- 5 Due Date: Payment due date
- 6 Account information: Client name and address
- 7 Remit payment information: Name and address to send payment made by check
- 8 Invoice History: Lists history of invoices, adjustments, and payments.
 - Top row is the current invoice information. *This is the current invoice balance due.* •
 - Clients should monitor their account for aging balances and follow up with their Account Representative or Lab • Billing as needed.
- 9 Messages

Page 2

*Note, the format of these pages may vary by account.

- Clients who receive weekly charge notifications will have the notification summaries posted here.
- Adjustments and payment information will also be posted on the detail pages.
- Amounts posted in parentheses () have been either credited to your account or adjusted from your account.
- Clients should reconcile their monthly invoices with submitted insurance adjustment forms.
- Clients should contact their Account Representative immediately with any questions or concerns.

DETAIL FOR CURRENT INVOICE

LAB# 🚺	PROCEDURE	DATE 🙆			
RQ12345	308415300	10/20/2022	Patient, Mickey Mouse 02/08/1945 ID: 000	PSA TOTAL (DIAGNOSTIC), 84153	\$1.00
RQ12345	308502500	11/02/2022	Patient, Mickey Mouse 02/08/1945 ID: 000	CBC WITH DIFF, 85025	\$1.00
RQ12345	308413200	11/02/2022	Patient, Mickey Mouse 02/08/1945 ID: 000	POTASSIUM, 84132	\$1.00
RQ12488	308614000	11/02/2022	Patient, Donal Duck 01/01/1965 ID: 001	C-REACTIVE PROTEIN, 86140	\$1.00
RQ00589	308256500	11/02/2022	Patient, Minnie Mouse 10/01/1940 ID: 002	CREATININE, 82565	\$1.00
RQ12345 RQ12488 RQ00589	308413200 308614000 308256500	11/02/2022 11/02/2022 11/02/2022	Patient, Mickey Mouse 02/08/1945 ID: 000 Patient, Mickey Mouse 02/08/1945 ID: 000 Patient, Donal Duck 01/01/1965 ID: 001 Patient, Minnie Mouse 10/01/1940 ID: 002	POTASSIUM, 84132 C-REACTIVE PROTEIN, 86140 CREATININE, 82565	\$; \$ \$

Client Bill Subtota	\$5.00
BALANCE FORWARD	() \$95.00
TOTAL BALANCE DUE	(3) \$100.00

- 1 Lab#: Accession number/RQ number
- 2 **DATE:** Date of service
- 3 Patient: Patient name, date of birth, ID number
- 4 **Description:** Description/test name
- 5 **Amount:** Amount billed for test
- 6 Client Bill Subtotal: Total amount of charges for current month (this is the amount due for current invoice)
- 7 Balance forward: Sum of previously posted invoices in which payment has not been posted

8 - Total Balance Due: Accumulative total amount due on account

Create or edit payment profile

Users can create a Payment Profile to streamline the process of making credit card or ACH payments online by saving cardholder or bank account information so your users do not need to enter this information each time a payment is made. *Credit card type, number, expiration date, and security code information cannot be saved to a payment profile because it is sensitive information and must be entered each time a payment is made via credit card.*

1. Under 'Home,' go to the 'User Services' drop-down tab and select 'Payment Profile.'



2. For credit card payments, select 'Credit Card' from the Payment Method drop down, edit or enter 'Account Holder' information in the window displayed, and click 'Approve or click 'Cancel' to go back.

Account Holder	r		
Payment Method:	Credit Card 👻		
First Name:*	test	Last Name:*	test
Company Name:	test	Address:	test
City:	test	State / Province:	MN 👻
Zip:	55407	Country:	*
Phone:	(000) 000-0000	E-mail:	
Approved			
Ву:		On:	08/27/2021 16:58
Su	abmit Cancel		

3. For ACH Payments, select 'ACH' from the Payment Method drop down, edit or enter 'Account Holder' and bank account information in the window displayed, and then click 'Approve' or click 'Cancel' to go back.

Account Holder			
Payment Method:	ACH -		
First Name:*	test	Last Name:*	test
Company Name:	test	Address:	test
City:	test	State / Province:	MN 👻
Zip:	55407	Country:	USA 👻
Phone:	(000) 000-0000	E-mail:	test@allina.com
Bank Routing Number: Bank Account Number: Approved	Personal Account Business Account	Confirm Bank Routing Number: Confirm Account Number:	Checking Account Savings Account
By:		On:	08/27/2021 16:58
		Approve Sub	Cancel

4. For both credit card and ACH Payments, select 'Either' from the Payment Method drop down, edit or enter 'Account Holder' and bank account information in the window displayer, and then click 'Approve' or click 'Cancel' to go back.

Pay online

To pay online via credit card or ACH:

1. Click on the tab 'Pay Online'.

Home	Pay Online	Invoice History

2. If users have access to more than one account, use the dropdown menu for the Client field to select the account to which payment will be applied. Click the magnifying glass to confirm selection.

A	lina	-lealth	1	K Client Portal	INVOICE TESTING ACCOU	P4T
toma Pa	ry Ordina Involva H	latury Paymant Hatury	Peak	opiny Updata Requirit for following and	Decumente - Committente	Cana
Pag Onli	ini .					
Salar	ct invoices to pay and	define payment emount.	Cient	 _ Q		
	Company	Data	b	INVOICE TESTING ACCOUNT 2 Due	Payment Amount	
Select						

- 3. Click on the invoice.
- 4. Select one or more invoices to pay by marking the box in the 'Select' column next to each invoice to be paid.

lect	Company	Date	Invoice#	Balance Due	Payment Amount	Payment Note	View Invoice PDF
-	ALLINA HEALTH SYSTEMS	08/26/2021	500061	\$230.60		<u>5</u>	
3	ALLINA HEALTH SYSTEMS	08/26/2021	500062.1	\$230.60		2	
				\$461.20	\$0.00		

5. The 'Payment Amount' field automatically displays the current balance due on the invoice, but this amount may be changed by entering the dollar amount of the payment.

Select	Company	Date	Invoice#	Balance Due	Payment Amount
	ALLINA HEALTH SYSTEMS	08/26/2021	500061	\$230.60	\$230.60
	ALLINA HEALTH SYSTEMS	08/26/2021	500062.1	\$230.60	

6. Notes can be added for your reference. Notes are not submitted with the payment and are not viewable by Allina Health staff. To add a note, click on the **b** icon and enter the note. Click OK to save and proceed.

Invoice# 500061		
Testing		
	ОК	Cancel
	2.13	

To pay online via credit card:

1. Click the 'Credit Card Payment' button at the bottom of the page. The dollar amount at the bottom of the page below the 'Payment Amount' column displays the total dollar amount being charged to the credit card.

	Payment Amount	Payment Note	View Invoice PDF
0	\$230.60	ъ	PDF
0		<u>5</u>	<u></u>
0	\$230.60		
			Page size: 10 🔻
		Credit Card Payment	ACH Payment Cancel

2. Below the list of invoices, two totals will be listed. The 'Balance Due' is the total due for all invoices and the 'Payment Amount' is the total payment for all invoice(s) selected for payment.

Select	Company	Date	Invoice#	Balance Due	Payment Amount Pa
	ALLINA HEALTH SYSTEMS	08/26/2021	500061	\$230.60	
✓	ALLINA HEALTH SYSTEMS	08/26/2021	500062.1	\$230.60	\$230.60
				\$461.20	\$230.60
Page 1	of 1 (2 items) 1			total amount owed	Total amount selected to pay

3. Complete all fields as indicated in the cardholder information window and click 'Submit'.

First Name:*		Last Name:*	
	Required		Required
Company Name:*		Address:*	
	Required		Required
City:*		State / Province:*	•
	Required		Required
Zip:*			
	Required		
Phone:	(000) 000-0000	E-mail:	

Note: If a credit card payment profile already exists, the information in this window will be pre-populated. Please see page 16 on how to create or edit a payment profile. Credit card information will not be saved and will need to be entered each time.

4. Confirm and authorize the amount by clicking 'Pay' to the authorization message or click 'Cancel' to go back.

Company	Payment Amount	Status	Select
ALLINA HEALTH SYSTEMS	\$1.00		Pay
	Cancel		
	PREFERRED RESELLER		

5. Enter in the payment information and click 'Pay' to process the credit card payment or click 'Close' to go back.

Exp. Date *	Card Code
Billing Address	
First Name = Test	Last Name = Test
Billing Country = USA	▼ ^{Zp} * 55407
Street Address * †est	city * test
State # MN	Phone Number
Рау	Cancel

6. A confirmation window will be displayed confirming the payment. Click 'Close' to continue. If the 'Transaction Complete' message is not displayed, there may be an issue with the credit card or the website payment function itself. Please try the credit card again and verify credit card information entered is correct or try another credit card.



7. A window providing the status of payment and an authorization code will be displayed. Click 'Close' to continue.

Outreach Lab \$1,00 Approved 0

To pay online via ACH:

 Click the 'ACH Payment' button at the bottom of the page. The dollar amount at the bottom of the page below the 'Payment Amount' column displays the total dollar amount being debited from the bank account provided or displayed if an ACH payment profile already exists. Please see page 16 on how to create or edit a payment profile.

	Payment Note		View Invo	pice PDF	
٦					
			~		
		Credit Card Pay	ment	ACH Payment	Cancel

2. If an ACH payment profile does not already exist, the below window will come up for you to enter and submit your demographic and bank account information so that the ACH payment can be processed.

T TI MA TANKITI AT		Last Name:*		
	Required		Required	
Company Name:*		Address:*		
	Required		Required	14
City:"		State / Province:*		-
	Required		Required	-87
Zip:*				
	Required			
Phone:	(000) 000-0000	E-mail:		
Bank:*	See among			
Bank:"	Required]	Checking Account	
Bank:"	Required Personal Account Business Account]	 Checking Account Savings Account 	
Bank:" Bank Routing Number:"	Required Personal Account Business Account	Confirm Bank Routing Number:*	 Checking Account Savings Account 	
Bank:* Bank Routing Number:*	Required Personal Account Business Account Required	Confirm Bank Routing Number:*	Checking Account Savings Account Required	
Bank:* Bank Routing Number:* Bank Account Number:*	Required Personal Account Business Account Required	Confirm Bank Routing Number:*	Checking Account Savings Account Required	

3. If an ACH payment profile already exists or if you entered in your demographic and banking information in the previous screen, click 'Schedule Payment' in the window below to continue processing the payment, or click 'Cancel' to go back.

TELCOR \$1.00 By clicking 'Schedule Payment' you authorize the payment of \$1.00 from Account •••••••99999. The funds will be withdrawn as an ACH debit from your bank account. withdrawal from your account will generally occur within 2 to 3 business days of payment.	TELCOR \$1.00 By clicking 'Schedule Payment' you authorize the payment of \$1.00 from Account ••••••99999. The funds will be withdrawn as an ACH debit from your bank account. The withdrawal from your account will generally occur within 2 to 3 business days of payment. Schedule Payment Cancel	TELCOR	\$1.00	
By clicking 'Schedule Payment' you authorize the payment of \$1.00 from Account *******9999. The funds will be withdrawn as an ACH debit from your bank account. withdrawal from your account will generally occur within 2 to 3 business days of payment.	By clicking 'Schedule Payment' you authorize the payment of \$1.00 from Account •••••••9999. The funds will be withdrawn as an ACH debit from your bank account. The withdrawal from your account will generally occur within 2 to 3 business days of payment.			
Schedule Payment Cancel			Schedule Payment	Cancel

4. You will then see a window providing you with a status. Click 'Close' to continue. If you see anything other than a status of 'Approved', there may be an issue with the ACH payment information provided or with the website payment function itself. Please verify ACH information entered is correct and try the payment again.

ompany	Payment Amount	Status
TELCOR	\$1.00	Approved
		Close

Review payment history

Past payments can be viewed under the 'Payment History' tab.

1. Click on the 'Payment History' tab.



- 2. A complete list of payments made will be displayed.
- 3. Searches may be edited or narrowed by changing the 'From' and 'To' date. These fields can be populated by a calendar view to select dates or dates can be manually typed in.

From:*	8/27/2020)		-	To	* 8/2	7/20	21		- 🤇
	(44) (Au	igus	t 202	20	(
#									ence	
		SUN	MON	TUE	WED	THU	FRI	SAT	_	
	31							1		
	32	2	3	4	5	6	7	8		
	33	9	10	11	12	13	14	15		
	34	16	17	18	19	20	21	22		
	35	23	24	25	26	27	28	29		
	36	30	31							
			Too	dav	Cle	ar				

- 4. Once the dates are selected, click the \bigcirc icon.
- 5. Payment allocation details on invoices can be viewed by clicking on the arrow on the left of any payment row in the search.

	*	Date *	Reference	+	Туре	*	Amount		Unepplied	+
5		07/21/2016	**************		Hastercard			\$5.55		\$0.55
5		67/21/2016	***************		Hestercerd			\$5.00		\$0.00
5		67/21/2016	*************1111		Vise			\$25.00		\$0.68
3		07/21/2016	*************1111		Vise			\$35.00		\$0.00
		07/28/2016	***********1111		Vise			\$24.97		\$0.00
3		87/28/2016			Visa			\$5.00		\$0.00
5	1	67/28/2016	***************		Visa			\$5,000.00		80.00
2	/	07/28/2016			Vian			\$1.00		\$0.00
•		04/26/2016			Business Check			\$\$3,000.00		\$58,000.88
				la contra c				1		
	Com	pany .		Stypoice Date		Ins	sice#		Areaust	
	TELC	COR Central		06/30/2012		363	427			\$3.00
	781.0	COR Central		10/31/2012	104145					\$3.00
	TBLC	Off Central		12/31/2015		289	1308			\$0.00
3		01/21/2016			Cash			\$15.00		\$15.00
								\$51,522.00		
Fare	. 2 . 6 .	1 (25 dema) (1) 2 1 (2)								Fase size: 10 .

Review invoice history

Past invoices can be found under the 'Invoice History' tab. Invoices are available in the portal in both excel and PDF formats.

1. Click on the 'Invoice History' tab.

Home	Pay Online	Invoice History

- 2. A list of invoices for a rolling 12-month period will be displayed.
- 3. Searches may be edited or narrowed by changing the 'From' and 'To' date. These fields can be populated by a calendar view to select dates or dates can be manually typed in.

In	voice l	listory								
Ę	From:	8/27/2020			-	To	8/27	/202	1	- 0
#	# View				uly	2020)	(Jate
			SUN	MON	TUE	WED	THU	FRI	SAT	
		27				1	2	3	4	8/26/2021
		28	5	6	7	8	9	10	11	0.05.0001
		29	12	13	14	15	16	17	18	8/20/2021
		30	19	20	21	22	23	24	25	
	Page 1	31	26	27	28	29	30	31		
_	rage	32								
				Too	lay	Cle	ear			

- 4. Once the dates are chosen, click the 🤍 icon.
- 5. A summary of activity against each invoice will be displayed.

	From: 7/6/2020 • To: 8/27/2021 • 🔍													
#	View Detail 💡	View Invoice PDF 9	Company	9 Date 9	Invoice#	9 Status	Ŷ	Charges 9	Adjustments 9	Payments 9	Refunds 9	Balance Due 9		
			ALLINA HEALTH SYSTEMS	08/26/2021	500062.1	In Process		\$230.60	\$0.00	\$0.00	\$0.00	\$230.60		
			ALLINA HEALTH SYSTEMS	08/26/2021	500061	In Process		\$230.60	\$0.00	\$0.00	\$0.00	\$230.60		
								\$461.20	\$0.00	\$0.00	\$0.00	\$461.20		
	Page 1 of 1 (2 ite	ems) 🕜 1	D									Page size: 10 •		

- 6. To see the details of an invoice, click on the 🔬 under the 'View Detail' column that corresponds to the invoice row to be reviewed.
- 7. A window will pop up with the invoice details, displaying any Charges, Payments, and Adjustments.

nvoice Date: 0 nvoice#: 5 alance Due: \$	8/26/2021 00062.1 230.60						
Charges							
Service Date	Patient#	Patient	Qty	Procedure Identifier	Description	Price	Amount
08/26/2021		TEST, LABCORP	1	308351629	21-HYDROXYLASE ANTIBODIES	\$40.00	\$40.00
08/26/2021		TEST, LIPID	1	308006100	LIPID PANEL	\$16.60	\$16.60
08/26/2021		TEST, MULTIPLE	1	308502500	CBC WITH DIFF	\$6.60	\$6.60
08/26/2021		TEST, MULTIPLE 0	1	308413200	POTASSIUM	\$7.40	\$7.40
08/26/2021		TEST, MULTIPLE 0	1	308020300	ZONISAMIDE (ZONEGRAN)	\$35.00	\$35.00
08/26/2021		TEST, SENDOUT	1	19030026	14.3.3 ETA, RHEUMATOID ARTHRITIS	\$125.00	\$125.00
Page 1 of 1	(6 items)					Page size:	10 -

8. Invoices can be reviewed as a pdf by clicking on the icon under the 'View Invoice PDF' column that corresponds to the invoice row to be reviewed.

Notification history

Clients set up with daily or weekly charge notifications can view previously posted notifications here. Notifications are available in both excel and PDF formats in the portal.

	Allina Health 💸 Client Portal														
Н	Home Pay Online Invoice History Notification History Payment History Price Inquiry Update Request for Information Documents Census U														
Cli	Client User Management														
	From: 3/27/2022 To: 4/26/2022														
	#	View Detail 🤗	View Notification $$	Date	9	Notificati	on# 9	On I	Invoice#						
							12345								
		2					12365								
			101				12475								
							12495								
			FD5 8158				12505	65	4321						

Documents

Clients have the functionality to view and print documents that have been posted to the portal.

1. Click on the 'Documents' tab.



2. Identify any new documents and review them by clicking on the hyperlink for the item to be viewed.

Information

User guides provided by the vendor, which contain information for all available features of the portal, can be found under the Information tab. Note, not all features are available to the users.

