Allina Health
LABORATORY

Client billing portal (TELCOR)

User guide

May 2023

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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
- Census reporting

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 TELCOR system will be password protected.
- Add AHLOutreachTELCOR@allina.com 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.

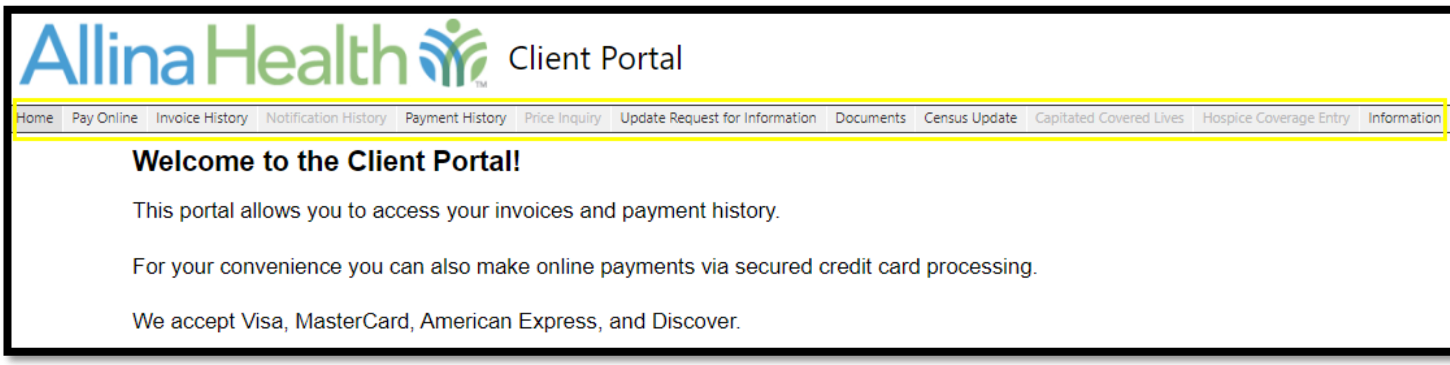
   https://allinahealth-client.ilabbill.com/Login

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
- Census Update
- Information

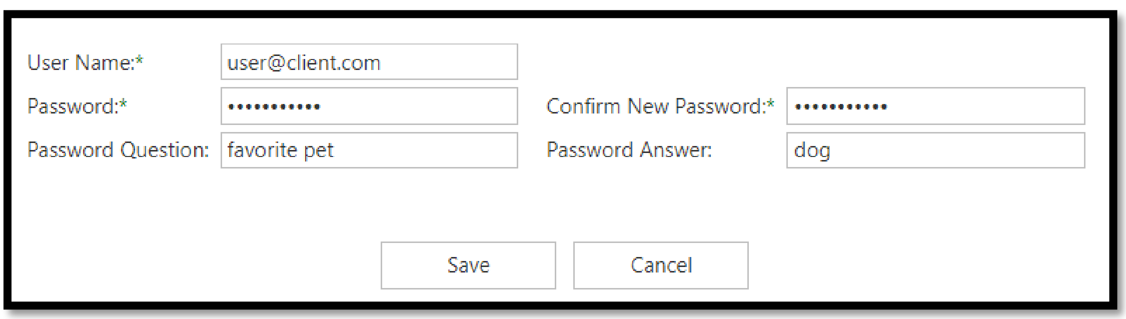


Changing your password

When logging in to the client billing portal for the first time, 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.*



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

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

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

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, Mickey 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 Detail | 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

A
Messages:
For accounting purposes, please include LAB and the invoice number on your payment. Thank you for your business! Please remit payment within 30 days.

Invoice Detail | Charge Detail | Messages

PDF Format

Page 1

Allina Health

1 INVOICE# LAB 000111	2 CLIENT XABC

CREDIT CARD USING FOR PAYMENT

☐ VISA ☐ MasterCard ☐ DISCOVER ☐ AMERICAN EXPRESS

CREDIT CARD NUMBER:	CARD EXPIRATION DATE	CARD SECURITY CODE
SIGNATURE	BILLING ZIP CODE	

INVOICE DATE	PAY THIS AMOUNT	DUE DATE
12/31/2022 (3)	$100.00 (4A)	01/30/2023 (5)

PLEASE REMIT WITHIN 30 DAYS | ENTER AMOUNT PAID $

6

CLIENT NAME
CLIENT ADDRESS
City, State Zip

7

MAKE CHECK PAYABLE TO:
ALLINA HEALTH LABORATORY
PO BOX 77008
MINNEAPOLIS, MN 55480-7708

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

8 **INVOICE HISTORY**

DATE	INVOICE	CHARGES	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	4B $100.00

MESSAGES 9

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# 1	PROCEDURE	DATE 2	PATIENT 3	DESCRIPTION 4	5 AMOUNT
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
				Client Bill Subtotal 6	$5.00
				BALANCE FORWARD 7	$95.00
				TOTAL BALANCE DUE 8	$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

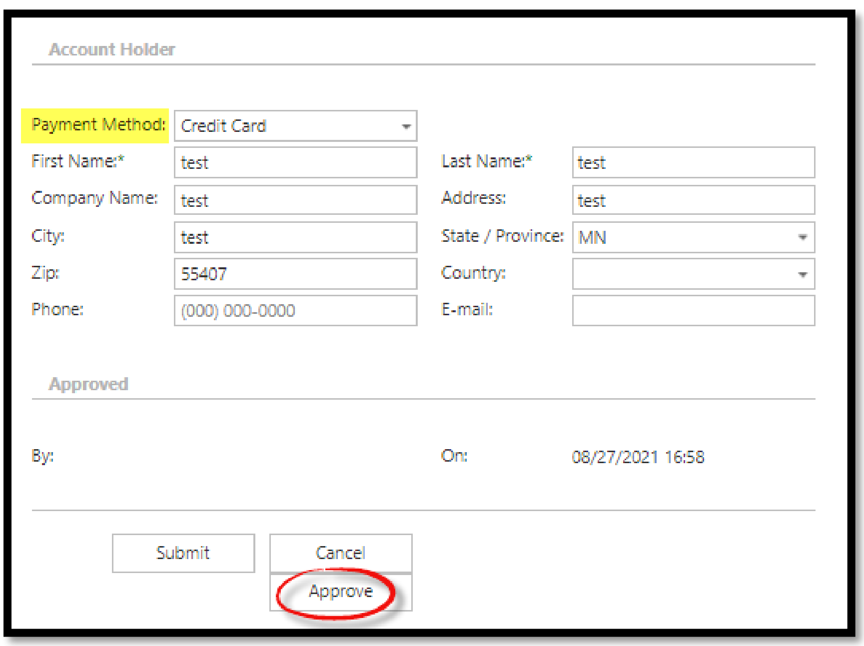
8 – **Total Balance Due:** Accumulative total amount due on account

Create or edit payment profile

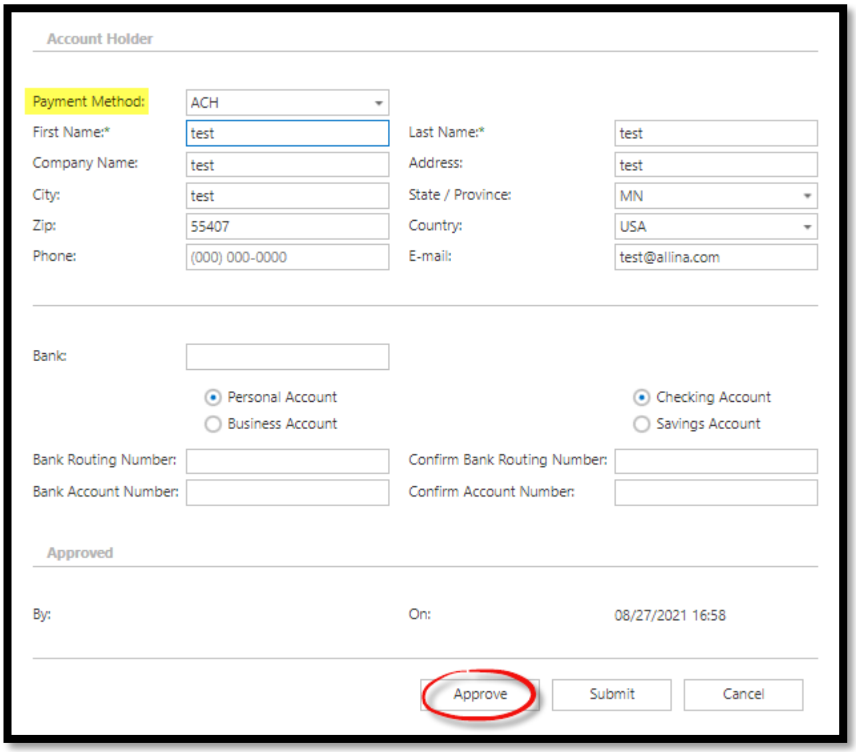
Users can create a Payment Profile to streamline the process of making credit card or ACH payments online by saving cardholder or bank account information so your users do not need to enter this information each time a payment is made. *Credit card type, number, expiration date, and security code information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



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.

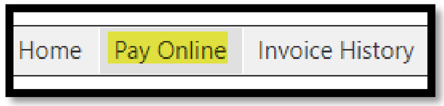


4. For both credit card and ACH Payments, select ‘Either’ from the Payment Method drop down, edit or enter ‘Account Holder’ and bank account information in the window displayer, and then click ‘Approve’ or click ‘Cancel’ to go back.

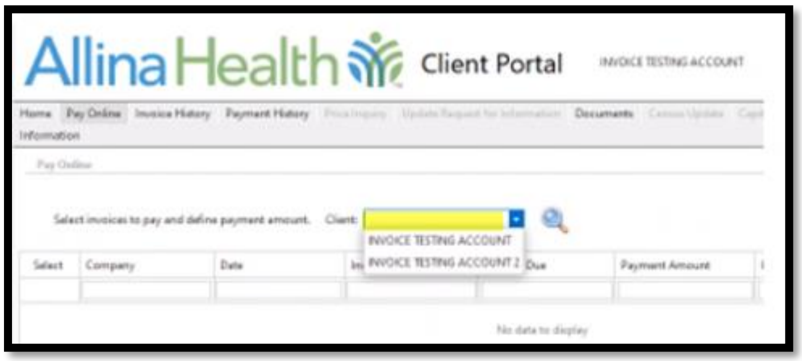
Pay online

To pay online via credit card or ACH:

1. Click on the tab ‘Pay Online’.

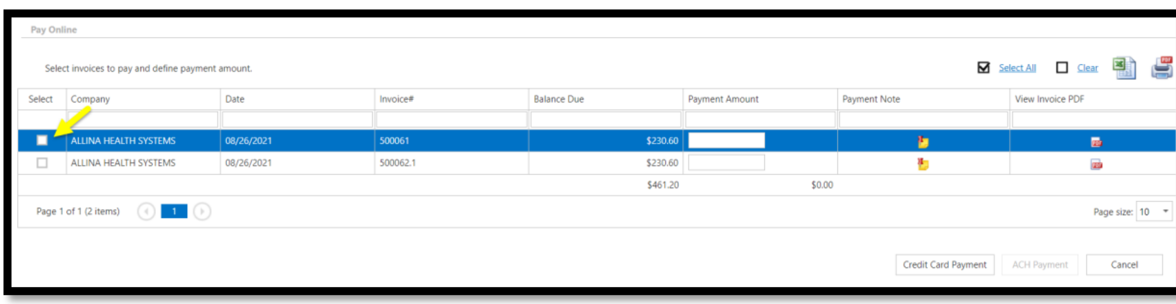


2. If users have access to more than one account, use the dropdown menu for the Client field to select the account to which payment will be applied. Click the magnifying glass to confirm selection.

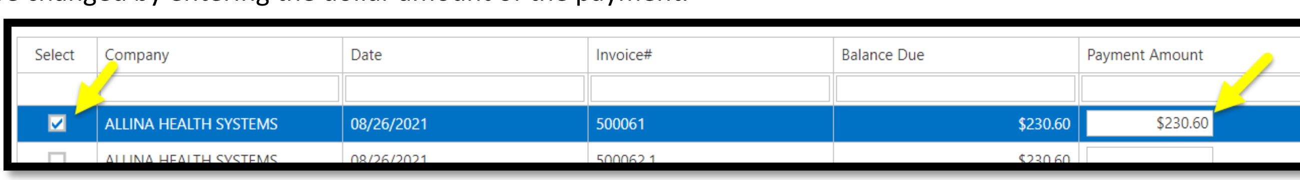


3. Click on the  icon to review the invoice.

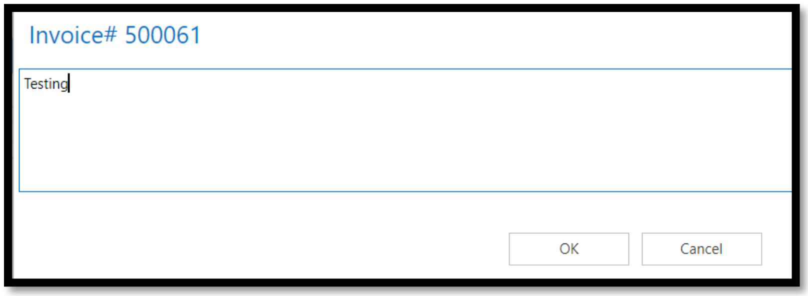
4. Select one or more invoices to pay by marking the box in the ‘Select’ column next to each invoice to be paid.



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.

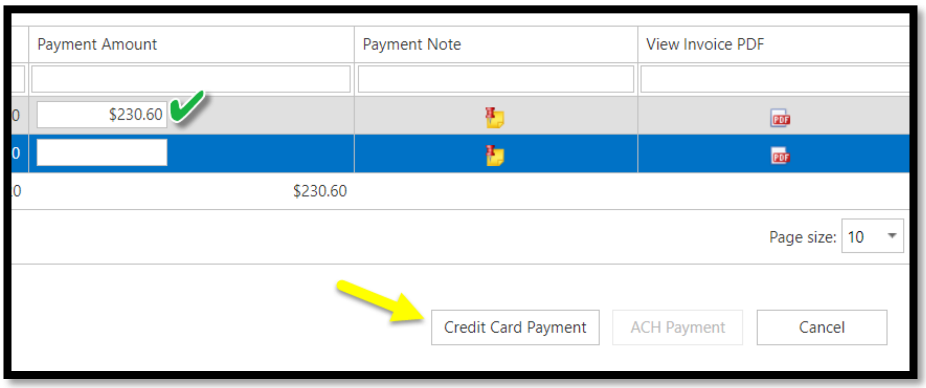


6. Notes can be added for your reference. Notes are not submitted with the payment and are not viewable by Allina Health staff. To add a note, click on the icon and enter the note. Click OK to save and proceed.

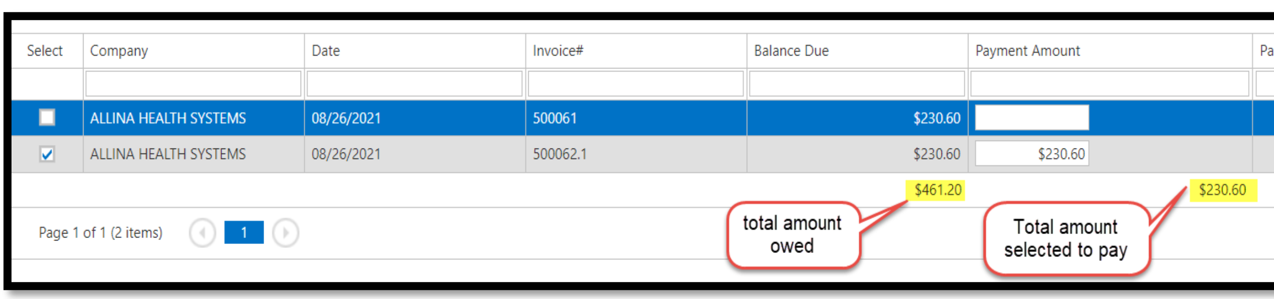


To pay online via credit card:

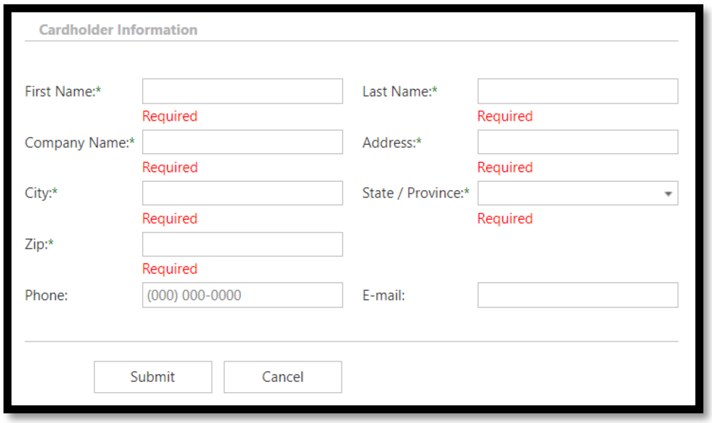
1. Click the 'Credit Card Payment' button at the bottom of the page. The dollar amount at the bottom of the page below the 'Payment Amount' column displays the total dollar amount being charged to the credit card.



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.

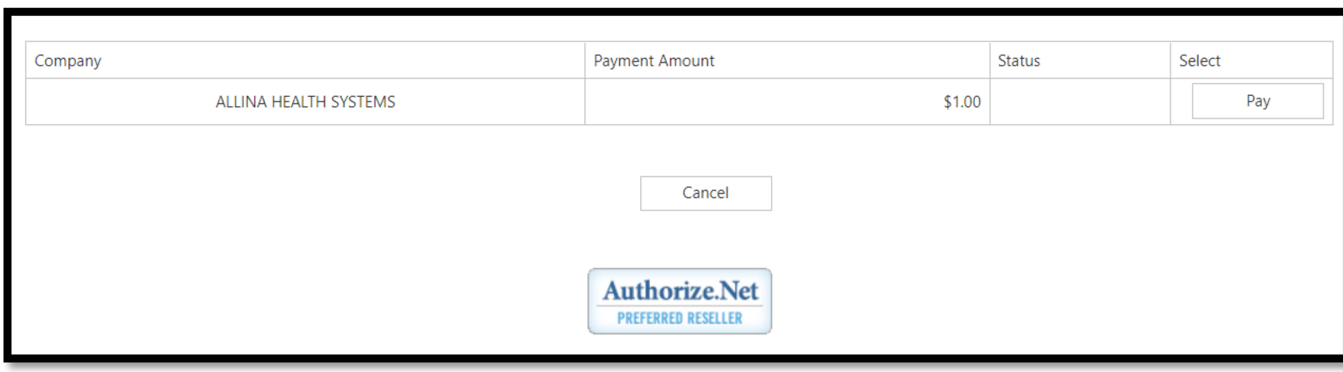


3. Complete all fields as indicated in the cardholder information window and click ‘Submit’.

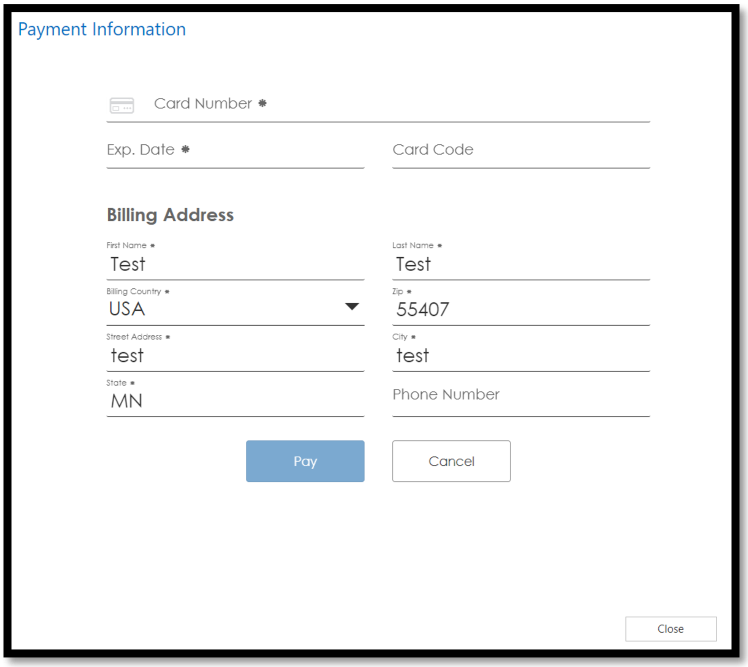


Note: If a credit card payment profile already exists, the information in this window will be pre-populated. Please see page 16 on how to create or edit a payment profile. Credit card information will not be saved and will need to be entered each time.

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

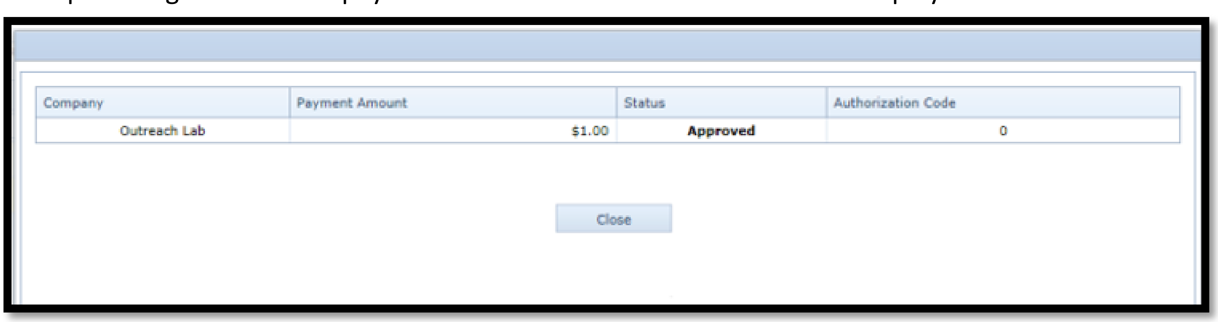


5. Enter in the payment information and click 'Pay' to process the credit card payment or click 'Close' to go back.



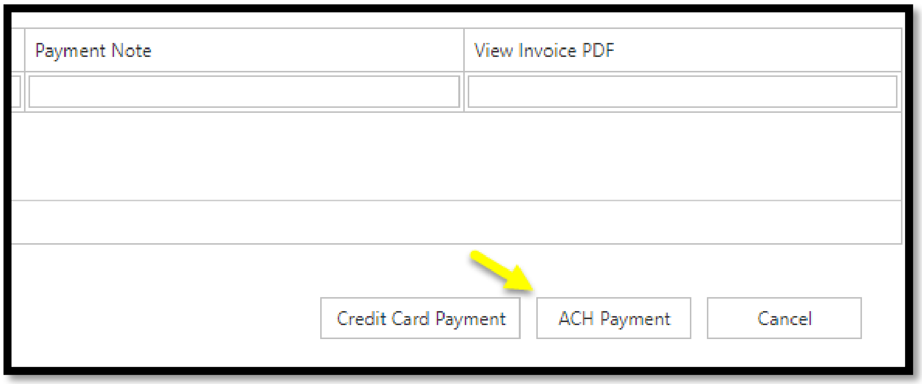
6. A confirmation window will be displayed confirming the payment. Click 'Close' to continue. If the 'Transaction Complete' message is not displayed, there may be an issue with the credit card or the website payment function itself. Please try the credit card again and verify credit card information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

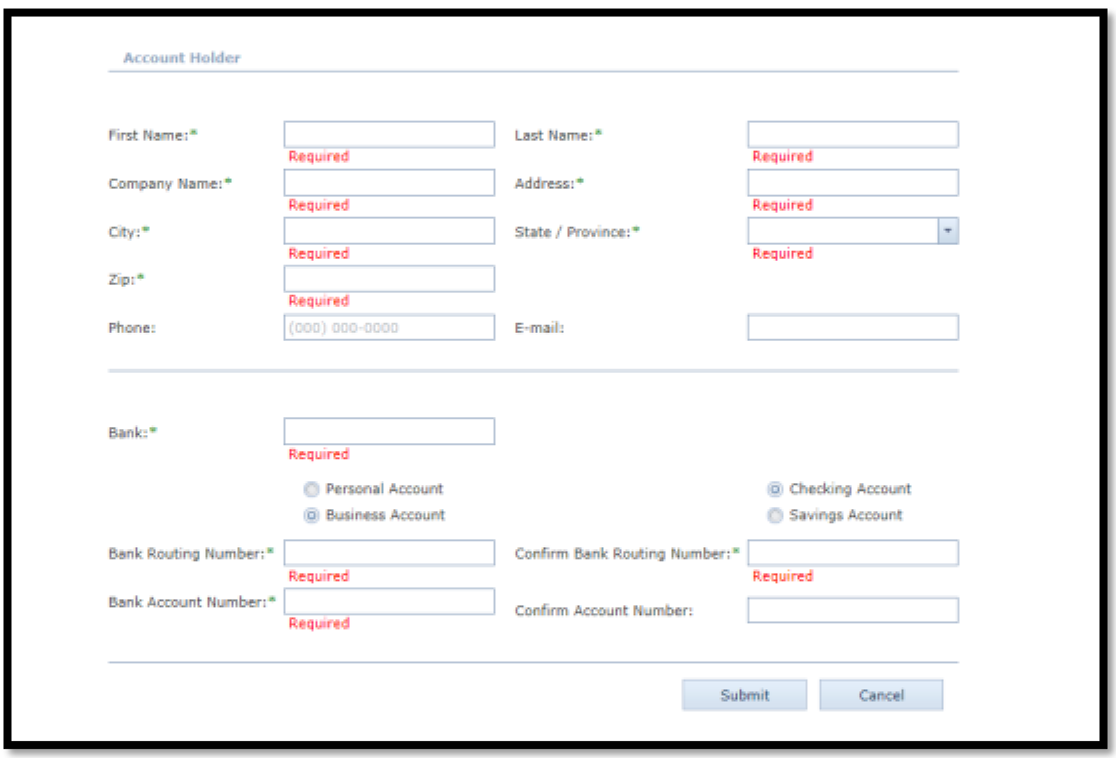


To pay online via ACH:

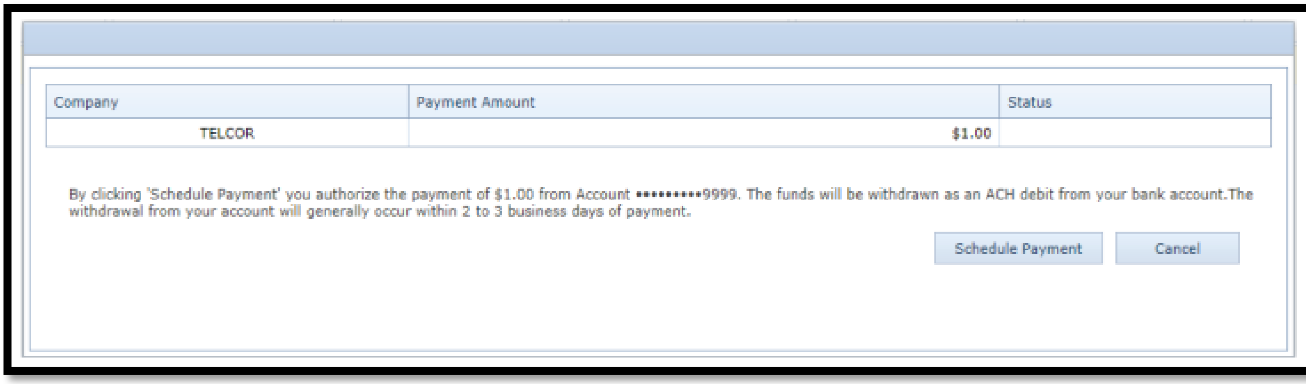
1. Click the 'ACH Payment' button at the bottom of the page. The dollar amount at the bottom of the page below the 'Payment Amount' column displays the total dollar amount being debited from the bank account provided or displayed if an ACH payment profile already exists. Please see page 16 on how to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



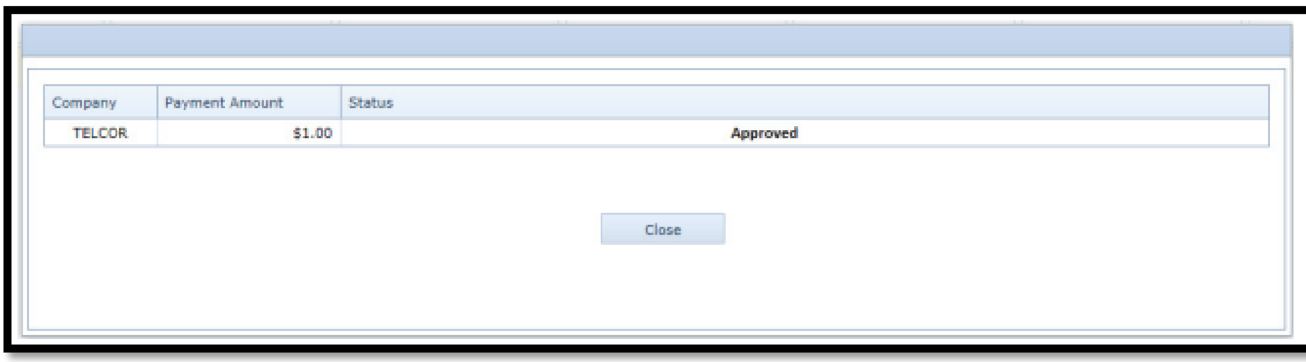
2. If an ACH payment profile does not already exist, the below window will come up for you to enter and submit your demographic and bank account information so that the ACH payment can be processed.



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.



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.



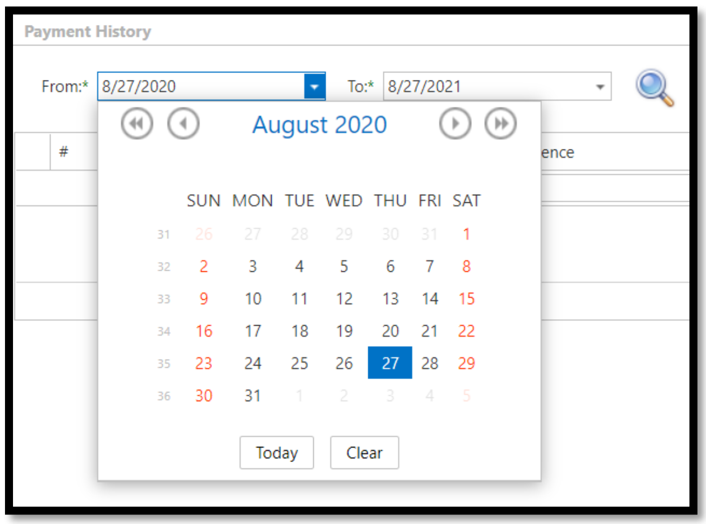
Review payment history

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

1. Click on the 'Payment History' tab.

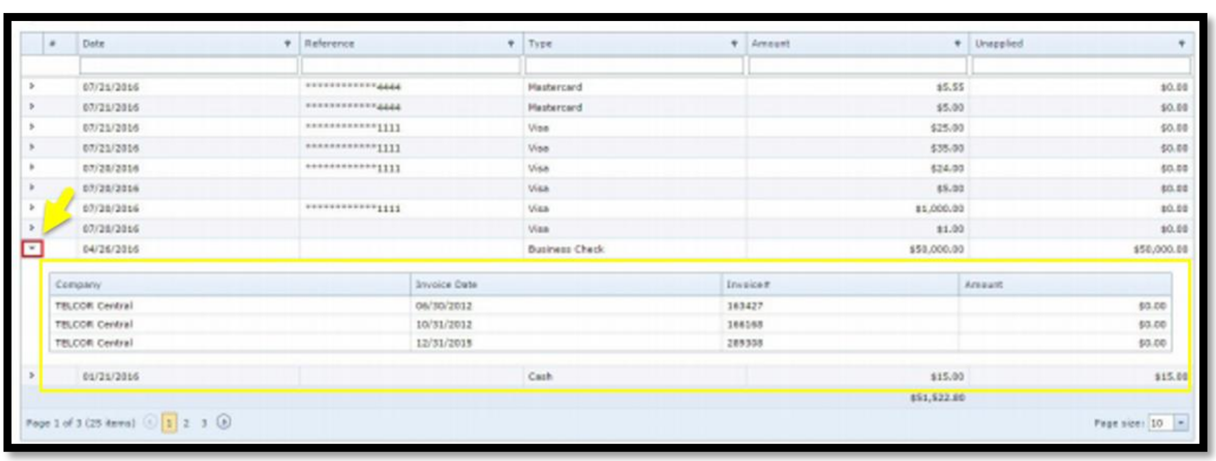
2. A complete list of payments made will be displayed.

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.



4. Once the dates are selected, click the  icon.

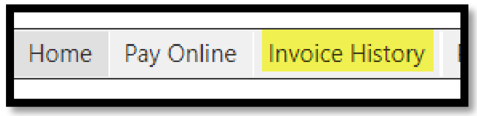
5. Payment allocation details on invoices can be viewed by clicking on the arrow on the left of any payment row in the search.



Review invoice history

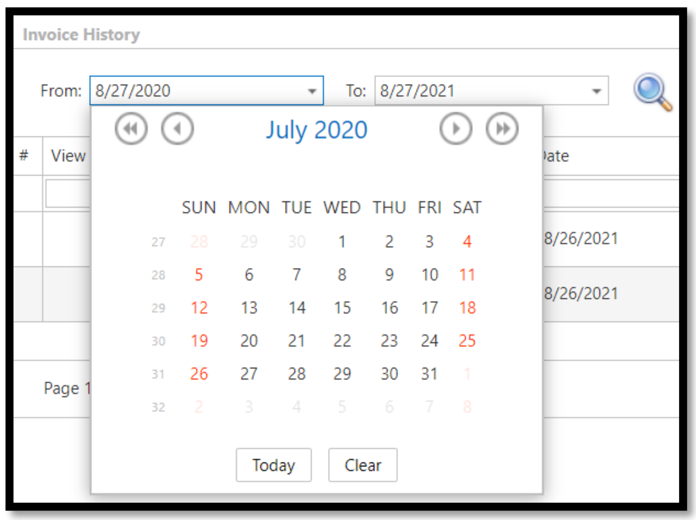
Past invoices can be found under the ‘Invoice History’ tab. Invoices are available in the portal in both excel and PDF formats.

1. Click on the ‘Invoice History’ tab.



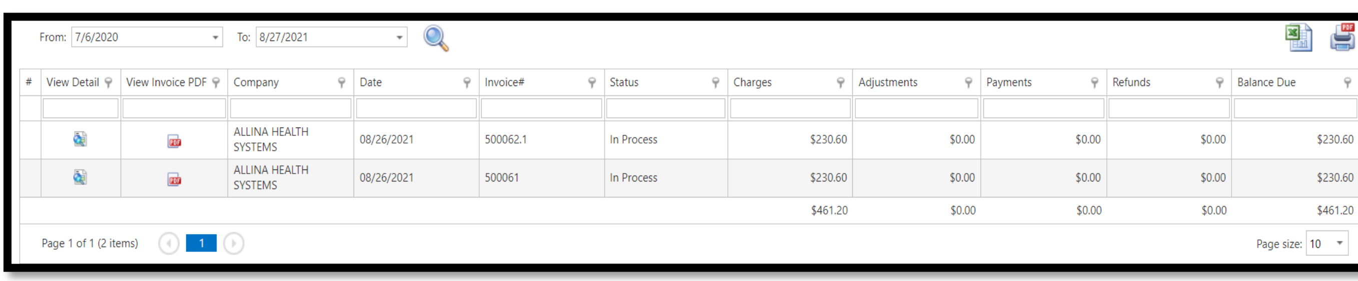
2. A list of invoices for a rolling 12-month period will be displayed.

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.



4. Once the dates are chosen, click the  icon.

5. A summary of activity against each invoice will be displayed.



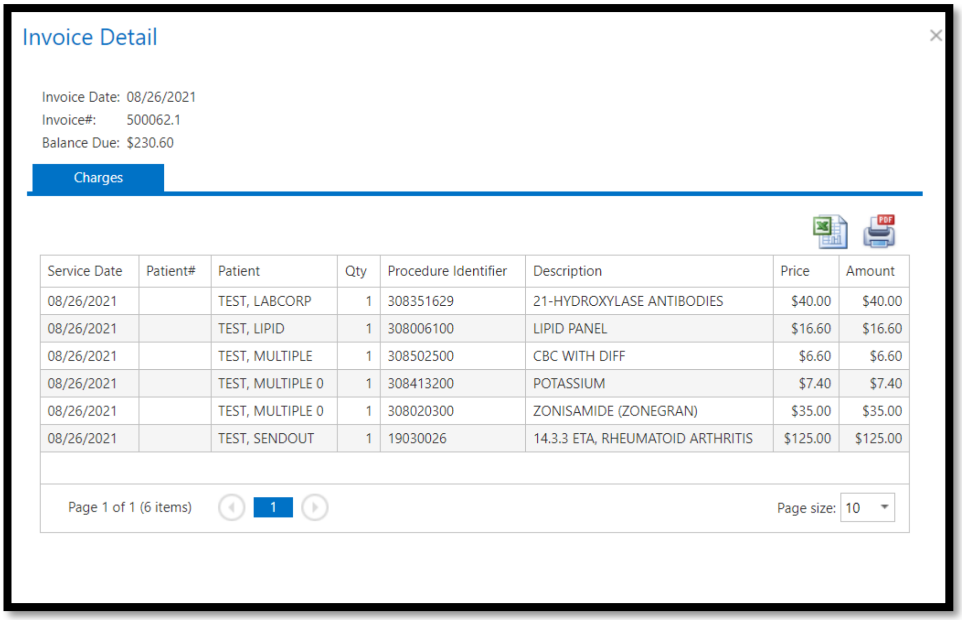
From: 7/6/2020 To: 8/27/2021

#	View Detail	View Invoice PDF	Company	Date	Invoice#	Status	Charges	Adjustments	Payments	Refunds	Balance Due
			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 items) 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.



Invoice Detail

Invoice Date: 08/26/2021
Invoice#: 500062.1
Balance Due: $230.60

Charges

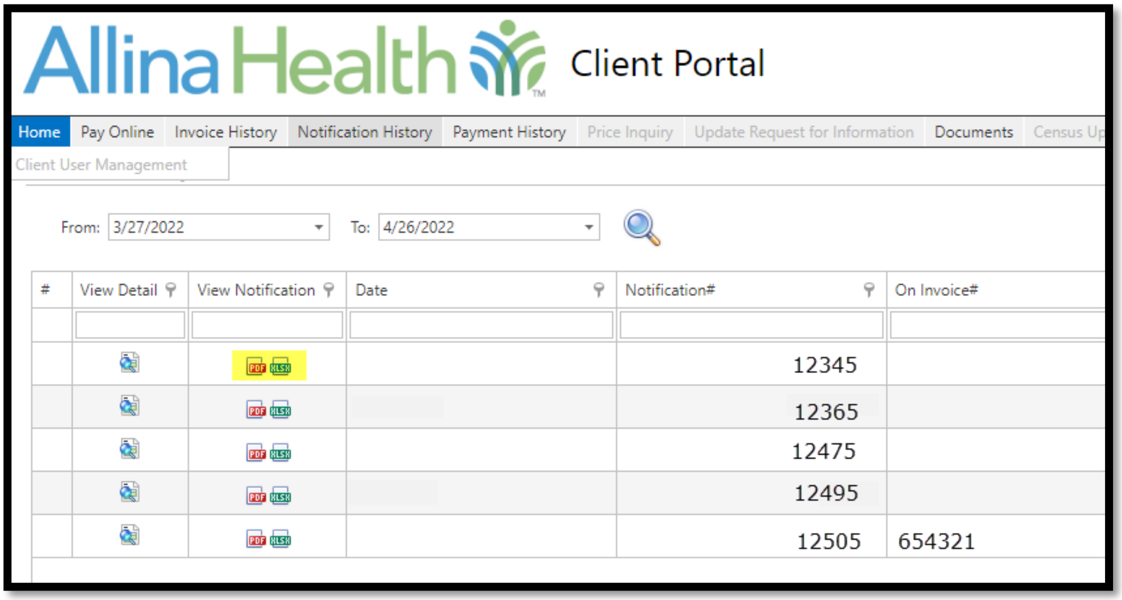
Service Date	Patient#	Patient	Qty	Procedure Identifier	Description	Price	Amount
08/26/2021		TEST, LABCORP	1	308351629	21-HYDROXYLASE ANTIBODIES	$40.00	$40.00
08/26/2021		TEST, LIPID	1	308006100	LIPID PANEL	$16.60	$16.60
08/26/2021		TEST, MULTIPLE	1	308502500	CBC WITH DIFF	$6.60	$6.60
08/26/2021		TEST, 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) 1 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.



Documents

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

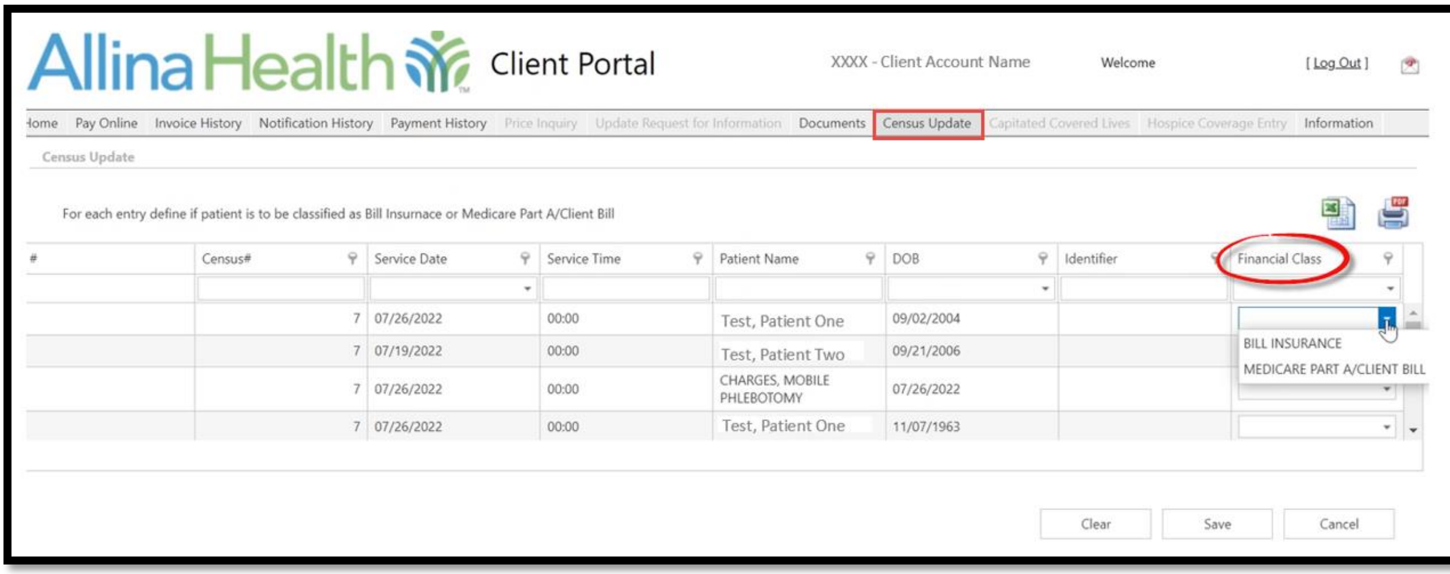
1. Click on the 'Documents' tab.

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

Census Update

Clients set up for census reporting must update the billing direction for each order.

- New orders that come in will be sent to the portal and create a patient report that needs to be reviewed/processed by the client.
- Under financial class, choose if charges should be billed to Medicare Part A/Client or Insurance bill.
    - If a user has access to multiple accounts, you will need to select the appropriate account to view the patient list and select the appropriate bill type.
- After the financial class has been selected, click save.
  **Note, once the save button has been clicked, it will remove the patient(s) from the list, and they will no longer be available to edit. You may update one patient at a time or choose to update multiple and then save.*



Information

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