



HowTo's

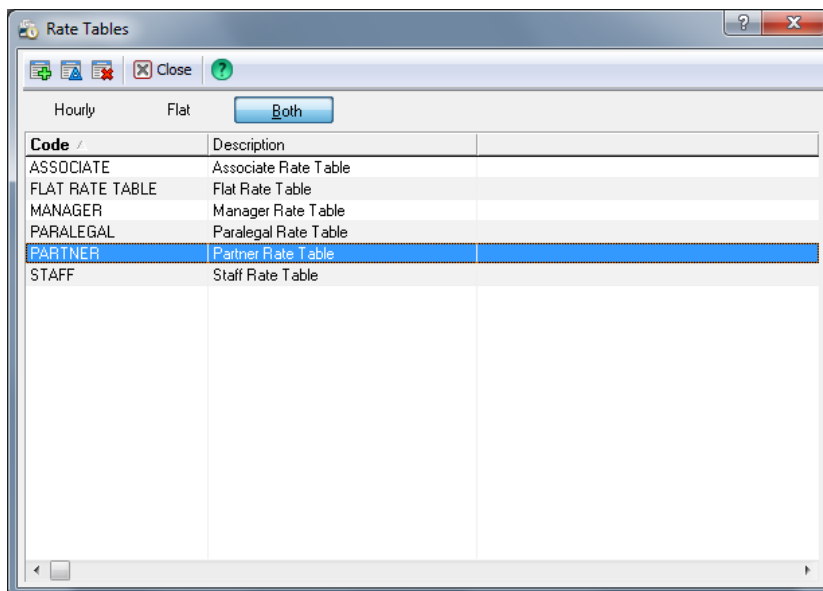


How To: Update Billing Rates in Time Matters/Billing Matters

From time to time it becomes necessary to change the rates used to generate fees. Using Time Matters® Basic Billing; or Time Matters with Billing Matters®, not only can rates be updated or changed, but they may be changed as of an **effective date**. In this White Paper, we will show two methods of updating billing rates.

Method #1 – Updating Rate Tables

- In Time Matters select **File** → **Setup**→**Rates and Accounts** → **Rate Tables**



- The **Rate Tables** window appears. Double-click on the table you wish to update to open and display the table. For this example, we'll look at the **Partner Rate Table**

Code: PARTNER
 Description: Partner Rate Table
 Rate Type: Hourly Rate Flat Rate

Rates
 Effective Date: 1/01/2003

Level	Description	Amount
1	Standard	155.0000
2	Premium	175.0000
3	Discount	140.0000
4	Governmental	100.0000

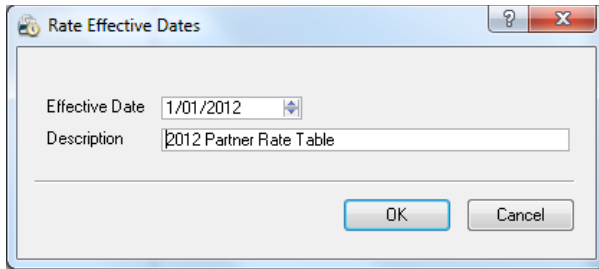
- Note the **Effective Date** field, which currently shows the last time rates were put into place. To create a new set of rates, click on the **Lookup** button next to the field

Effective Dates for PARTNER - Partner Rate Table

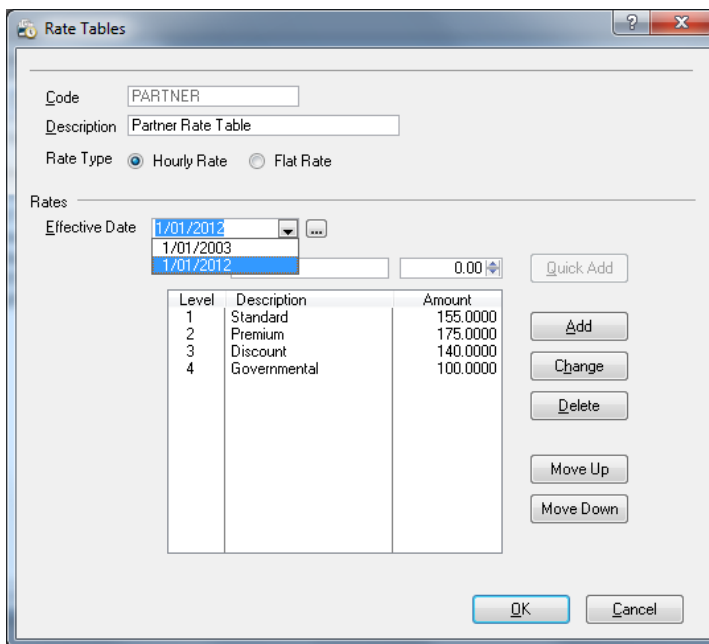
Toolbar: Add Record (circled), Select, Close

Date	Description
1/01/2003	2003 Partner Rate Table

- This window shows the templates which have been created *for this rate table* only. Click on the **Add Record** button to set up a new set of rates for this rate table



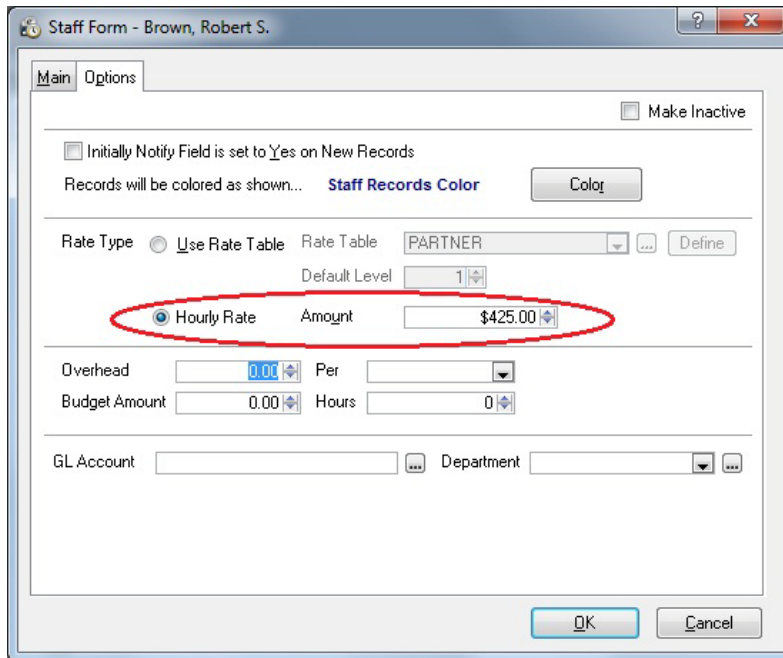
- Enter the date on which the new set of rates will be used
- Enter a description for this new set of rates
- Click **OK**. This adds the new date and returns to the rate table
- Now click on the drop-down arrow and select the new effective date



- Upon selecting the new effective date, the screen will clear
- Enter the new set of rates for the rate table, using the **Add** button
- Click **OK** to accept the new set of rates with the new effective date
- Repeat this process for each rate table to be changed
- When you have finished updating all rates for all tables, click on the **Close** button to close the **Rate Tables** list window

Method #2 – Individually Update Staff Rates

- Please note that using this method does not allow for an Effective Date
- In Time Matters, select **Database**→ **Staff**
- The **Staff Resource List** appears. Double-click on the staff names whose rates are to be updated



The screenshot shows the 'Staff Form - Brown, Robert S.' window. The 'Main' tab is active. There are several sections of controls:

- Make Inactive
- Initially Notify Field is set to Yes on New Records
- Records will be colored as shown... **Staff Records Color**
- Rate Type: Use Rate Table Rate Table: PARTNER
- Default Level: 1
- Hourly Rate Amount: \$425.00 (This section is circled in red)
- Overhead: 0.00 Per: [dropdown]
- Budget Amount: 0.00 Hours: 0
- GL Account: [dropdown] Department: [dropdown]

At the bottom are and .

- Enter the new rate the staff person is to use. Click **OK** to save the change and close the window
- Repeat this process with all staff members who are to use new rates
- **IMPORTANT:** Using this method means the new rates are effective immediately. There is no option to use effective dates.

Are you using Time Matters Basic Billing or Time Matters with Billing Matters for your billing? Are there other ways in which the program can meet your needs? Are you aware of all the features in the program? How can we help you get the most from this powerful practice management program? Be sure to contact us at 1-877-ELS-0555 if we may be of assistance for your training, reporting or general implementation needs.