Link Locations (Facilities) to Billing Engine

Path: Main Menu > Admin Tools Menu > System Setup (Supplemental) > Location Configuration > Location Setup

About

Agencies and Locations (Facilities) in NextStep Clinical can be linked and unlinked to NextStep Billing by completing the Billing Configuration steps below.

Link an Agency to NextStep Billing

1. Navigate to Location Setup following the path above.

2. In the Billing Configuration section of the window, use the **Agency** and **Facility** drop-downs to link to the Billing Engine. The fields will be updated once the user clicks the **Update** button (or **Add** button if creating a new Agency) located at the bottom of the window.

3. To create a new Agency to link to Billing:

a. Type the name of the agency you want to link in the **Agency** field.
b. Click outside of the Agency field or tab to save your changes. The new agency will be created and linked to NextStep Billing once the user clicks the **Update** button (or **Add** button if creating a new Agency) located at the bottom of the window.

Unlink an Agency

1. Navigate to Location Setup following the path above.
2. Click the **Edit** button next to the location you want to edit.
3. In the Billing Configuration section of the window, click the **X** in the Agency field.
4. Click the **Update** button.

Link a Location (Facility) to NextStep Billing

1. Navigate to Location Setup following the path above.

2. Click the **Edit** button for the location you want to edit. Or, if you are creating a new location, click the **New** button.
3. In the Billing Configuration section of the window, use the **Agency** and **Facility** drop-downs to link to the Billing Engine. The location will be updated once the user clicks the **Update** button (or **Add** button if creating a new Location) located at the bottom of the window.

4. To create a new Facility to link to Billing:

a. Type the name of the facility you want to link in the **Facility** field.
b. Click outside of the Facility field or tab to save your changes. The new facility will be created and linked to the Billing Engine once the user clicks the **Update** button (or **Add** button if creating a new Location) located at the bottom of the

window.

Unlink a Location (Facility)

1. Navigate to Location Setup following the path above.
2. Click the **Edit** button next to the location you want to edit.
3. In the Billing Configuration section of the window, click the **X** in the Facility field.
4. Click the **Update** button.