Creating a Bill

Slide One
Let’s Create a Bill in the Insurance Billing System.

Slide Two
Creating a bill consists of four steps -
• Step 1: Use “N” to begin a new bill,
• Step 2: Make changes as needed to the information presented to you,
• Step 3: Use “A” and press Enter to add the new bill into the system,
• The fourth and final step is to Print the bill.

Slide Three
Taking a closer look at Step 1, use “N” to begin a new bill:
• The N goes in the function area of the screen.
• Be sure to enter a UIN. If needed, the F1 Help key can be used to choose the UIN number from the name.
• And then press Enter …

Slide Four
• You’ll be presented with a screen full of information:
  o The invoice number is assigned for you;
  o Carrier numbers are filled in from screen 118;
  o The premium amounts & dates are filled in from screen 106.

Slide Five
Now, make any changes you need to make:
• You may want to update the due date.
• If you’re updating premium amounts, be sure to blank the total. In that way you can check the calculated amount with what’s expected.
• Then update coverage month, if needed.
• And be sure the medical and dental carriers are correct NOW. These cannot easily be changed later.
• Update premium & SGIP amounts, if needed.

Slide Six
After making all your changes, Step 3 is to use “A” to add the new bill … and then press Enter. And be sure the message showing is appropriate.

Slide Seven
Step 4 is to Print this bill:
• You may use the Print-Screen key, located on your keyboard;
  -or-
• In HRConnect, Print Bill, use the invoice number to bring up this particular invoice and print it;
  -or-
• Wait for requested bills to run - if you choose that option, you’ll also get into HRConnect and use the Download Letters section.

Slide Eight
Again, creating a bill is four steps -
• Use “N” to begin a new bill,
• Make any changes you need,
• Use “A” and press Enter to add the new bill,
• And then Print the bill.

If you have question or comments about this process, please e-mail BCSSupport@tamus.edu.

Thank you!

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