

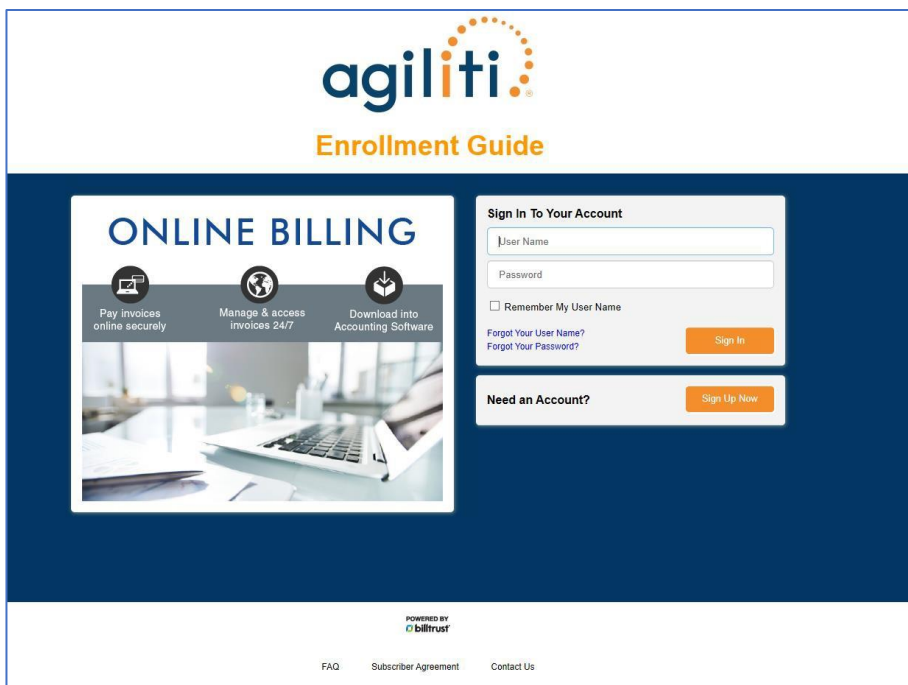
Agiliti eInvoice Connect User Guide

To access this site, start at <https://www.agilitihealth.com/>

- In the upper right corner, click [**Login**]
- From the dropdown, click [**Invoices**]



This is the Sign In screen . . .



Please note the link to the Enrollment Guide under our logo.

- This Guide will walk you through enrollment as well as help you navigate the site.

To Enroll in eInvoice Connect . . . You will only need to enroll once.

Click [[Sign Up Now](#)]

Need an Account?	Sign Up Now
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You will be taken to the *Sign Up With eInvoice Connect* screen.

User Information . . . This is where you create your User Name and Password.

- The first person to enroll for your facility is the Admin.

Sign Up With eInvoice Connect	Already Have an Account?
<small>*All fields are required unless otherwise indicated as "optional"</small>	Sign In
User Information	
Enter your full name and email address, then create a user name and password for your account.	
Name:	<input type="text" value="Sally Summer"/>
Email Address:	<input type="text" value="sally.summer@testhosp.com"/>
User Name:	<input type="text" value="sstesthospap"/>
Password:	<input type="password" value="....."/>
Confirm Password:	<input type="password" value="....."/>

Account Information . . . This information will be found on your most recent invoice or statement

Account Information
To verify your account, enter your account number along with the enrollment token found on your bill.

Customer Number:

Enrollment Token:

Customer Number – Please use the **Bill To** customer from your invoice.

Enrollment Token – This can be found in the upper right corner of your invoice. See below.


RENTAL INVOICE

INVOICE NO.	START DATE	END DATE	PAGE
<input type="text"/>	03/01/2020	03/31/2020	1 of 1

INVOICE DATE	DUE DATE	PO NUMBER
04/30/2020	05/30/2020	<input type="text"/>

INVOICE SUMMARY	
Invoice Subtotal	80.00
+ Taxes	0.00
TOTAL DUE	80.00

TO VIEW ONLINE GO TO:	https://agilityhealth.billtrust.com
USE THIS ENROLLMENT TOKEN	RDH KQL WSQ



Security Questions . . . Please answer the three questions. The dropdowns offer other question options.

Security Questions
Select and answer three security questions.

Security Question 1: ↓

Answer 1:

Security Question 2: ↓


Answer 2:

Security Question 3: ↓

Answer 3:

Stop Sending Mail (Check here if you would like us to stop mailing your paper bills)

I agree to the [Subscriber Agreement](#)



Remember to check I agree to the [Subscriber Agreement](#)

Click [**Sign Up**]

You are not done yet! You must activate your account first.

An email has been sent to sally.summer@testhosp.com.

Once you receive the email, follow the instructions in it to activate your account. Once you activate your account, you can sign in to elnvoice Connect and access your bills.

Note: If you cannot find the activation email, check your filters and spam settings to make sure that it was not blocked.

[Return to Sign In](#)

You will receive an activation email with a link.

- Click the link in the email.
- This will take you to the Sign In screen.
 - Sign in using the User Name and Password you set up during enrollment.
 - Continue to use these credentials whenever you access elnvoice Connect.

Navigating the site . . .

This is your main screen in eInvoice Connect.

The screenshot displays the Agiliti Enrollment Guide interface. At the top, the Agiliti logo is shown with the text "Enrollment Guide" below it. The main content area is divided into two sections: "Summary of Customer Number" and "Last Payment Details".

Summary of Customer Number: A search box is present. Below it, a table lists invoice categories with their respective balances and document counts. A "Select Amount" button is located at the bottom left of this section.

Category	Balance	Documents
Total	34,433.46	169 Documents
30 Days Past Due	8,896.34	1 Document
90 Days Past Due	25,538.12	168 Documents

Last Payment Details: This section provides information about the most recent payment, including the account name, payment date and time, amount paid, and confirmation number. It also includes links for "View Payment History" and "Setup Auto-Pay".

Account: [Input Field] Payment Account: **My Bank Account**
Payment Date & Time: **08/13/2020 12:00 AM EDT** Amount Paid: **90.00**
Confirmation Number: **936712** Payment Status: **Scheduled**

[View Payment History](#)
[Setup Auto-Pay](#)

powered by
eInvoice

[FAQ](#) [Subscriber Agreement](#) [Contact Us](#)

From this screen you can:

- View your Open (Unpaid) Invoices.
- View Closed Invoices.
- View your Payment History.
 - This will only reflect payments made in eInvoice Connect.
- Manage your settings.

View your Open (Unpaid) Invoices . . .

Click the [Open] tab.



The screenshot shows a software interface with a navigation bar at the top containing tabs for Summary, Open, Closed, Payment History, and Settings. Below the navigation bar is a summary section with a 'Total Balance' of \$34,433.46 and buttons for 'Pay Invoices', 'Print', 'Download', and 'Move to Closed'. The main area is a table of invoices with the following columns: PDF, Note, Group, Acct #, Ship To #, Doc Type, Invoice #, PO Number, Case ID, Bill Date, Inv Amt, Open Balance, District #, Paid Online, and Deid. A blue box highlights the 'Acct #' column. The table contains 11 rows of invoice data. At the bottom left, it says 'Total Documents: 171 (0 selected)' and at the bottom right, '(USD) Total Amount: \$0.00'.

PDF	Note	Group	Acct #	Ship To #	Doc Type	Invoice #	PO Number	Case ID	Bill Date	Inv Amt	Open Balance	District #	Paid Online	Deid
		Default Group			Fee/Adjustment	LF20200731			07/31/2020	8895.34	8895.34	037	0.00	N
		Default Group			AR Statement				04/18/2020	303758.66		037	0.00	N
		Default Group			Rental Invoice	4066524	1375-9535-1544		03/31/2020	-229.00	-229.00	037	0.00	Y
		Default Group			Rental Invoice	4066529	1385-4916-1520		03/31/2020	90.00	90.00	037	90.00	N
		Default Group			Rental Invoice	4066531	1385-4917-1520		03/31/2020	96.00	96.00	037	0.00	N
		Default Group			Rental Invoice	4066532	1385-4918-1520		03/31/2020	80.00	80.00	037	0.00	N
		Default Group			Rental Invoice	4066533	1385-4919-1520		03/31/2020	6.00	6.00	037	0.00	N
		Default Group			Rental Invoice	4066534	1385-4920-1520		03/31/2020	16.00	16.00	037	0.00	N
		Default Group			Rental Invoice	4066535	1385-4921-1520		03/31/2020	80.00	80.00	037	0.00	N
		Default Group			Rental Invoice	4066536	1385-4922-1520		03/31/2020	1930.60	1930.60	037	0.00	N
		Default Group			Rental Invoice	4066537	1385-4923-1520		03/31/2020	16.00	16.00	037	0.00	N
		Default Group			Rental Invoice	4066538	1385-4924-1520		03/31/2020	4.50	4.50	037	0.00	N

This screen will provide you with invoice information for all your open invoices.

- **Pay Invoices . . .**

- Check the invoice(s) you wish to pay.
- Follow the prompts.
- Invoices can be set up to pay at a future date by updating the **Payment Date** filed.
- Invoices can be Short paid or Over paid. A Reason Code will need to be selected.

- **Print . . .**

- Select a single or select multiple invoices to print.
- Click the PDF icon to print a single invoice.

- **Download . . .**

- Invoices can be downloaded into many different file formats.
- Select a single or select multiple invoices to download.

View Closed Invoices . . .

Click the [Closed] tab.

The screenshot shows a software interface for viewing closed invoices. A blue arrow points to the 'Closed' tab in the navigation bar. The interface includes a navigation bar with 'Summary', 'Open', 'Closed', 'Payment History', and 'Settings'. Below the navigation bar are buttons for 'Print', 'Download', and 'Move To Open'. The main area displays a table of invoices with columns for PDF, Status, Group, Acct #, Ship To #, Doc Type, Invoice #, PO Number, Case ID, Bill Date, Inv Amt, Open Balance, Client #, Paid Online, and Delid. A blue box highlights the 'Group' column.

PDF	Status	Group	Acct #	Ship To #	Doc Type	Invoice #	PO Number	Case ID	Bill Date	Inv Amt	Open Balance	Client #	Paid Online	Delid
		Default Group			Service/Sales Inv	342695			04/30/2020	250.00	0.00	037	100.00	N
		Default Group			Service/Sales Inv	342745	1990949556-1590		04/30/2020	202.65	0.00	037	362.65	N
		Default Group			Rental Invoice	4076932	1401-405-1544		04/30/2020	-336.00	0.00	037	0.00	N
		Default Group			Rental Invoice	4076935	RUTH STOLTE 6		04/30/2020	-144.00	0.00	037	0.00	N
		Default Group			Rental Invoice	4076936	1541248204		04/30/2020	80.00	0.00	037	0.00	N
		Default Group			Rental Invoice	4076937	1385-7475-1520		04/30/2020	144.00	0.00	037	0.00	N
		Default Group			Rental Invoice	4076938	1385-7476-1520		04/30/2020	160.00	0.00	037	0.00	N
		Default Group			Rental Invoice	4076939	1385-7477-1520		04/30/2020	80.00	0.00	037	0.00	N
		Default Group			Rental Invoice	4076940			04/30/2020	490.00	0.00	037	0.00	N
		Default Group			Rental Invoice	4076941	1385-7479-1520		04/30/2020	15.00	0.00	037	0.00	N
		Default Group			Rental Invoice	4076943	1385-7480-1520		04/30/2020	48.00	0.00	037	0.00	N
		Default Group			Rental Invoice	4076944	1385-7481-1520		04/30/2020	32.00	0.00	037	0.00	N

Total Documents: 2295 (0 selected) (USD) Total Amount: \$0.00

This screen will provide you with invoices that had been Open but are now Closed.

- **Print . . .**

- Select a single or select multiple invoices to print.
- Click the PDF icon to print a single invoice.

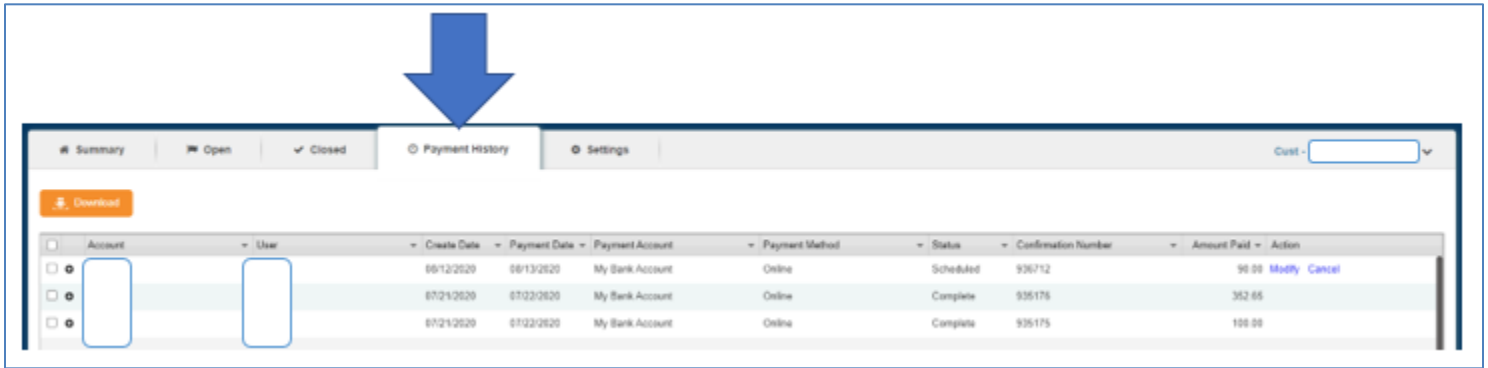
- **Download . . .**

- Invoices can be downloaded into many different file formats.
- Select a single or select multiple invoices to download.

View your Payment History . . .

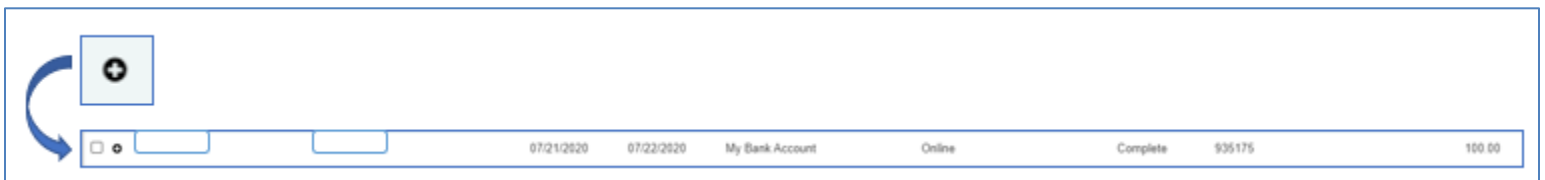
- This will only reflect payments made in eInvoice Connect.

Click the [Payment History] tab.



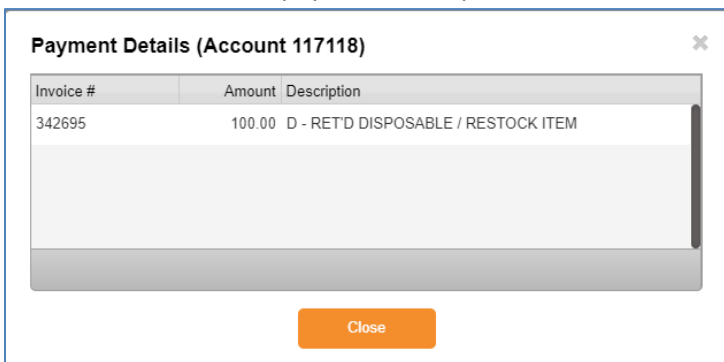
This screen will provide you with payment and invoice information of payments made in eInvoice Connect.

To get additional information about your payment please click the [+] . . .



You will receive a pop-up box like this . . .

- In this case the payment short paid the invoice and a reason for the short payment has been selected.



- **Download . . .**
 - Payments can be downloaded into many different file formats.
 - Select a single or select multiple payments to download.

By going back to your **Closed** screen, you can see that the invoice has closed and \$100.00 was closed with an online payment.

Summary Open Closed Payment History Settings Cust - Wanda Von Hofum

Print Download Move To Open

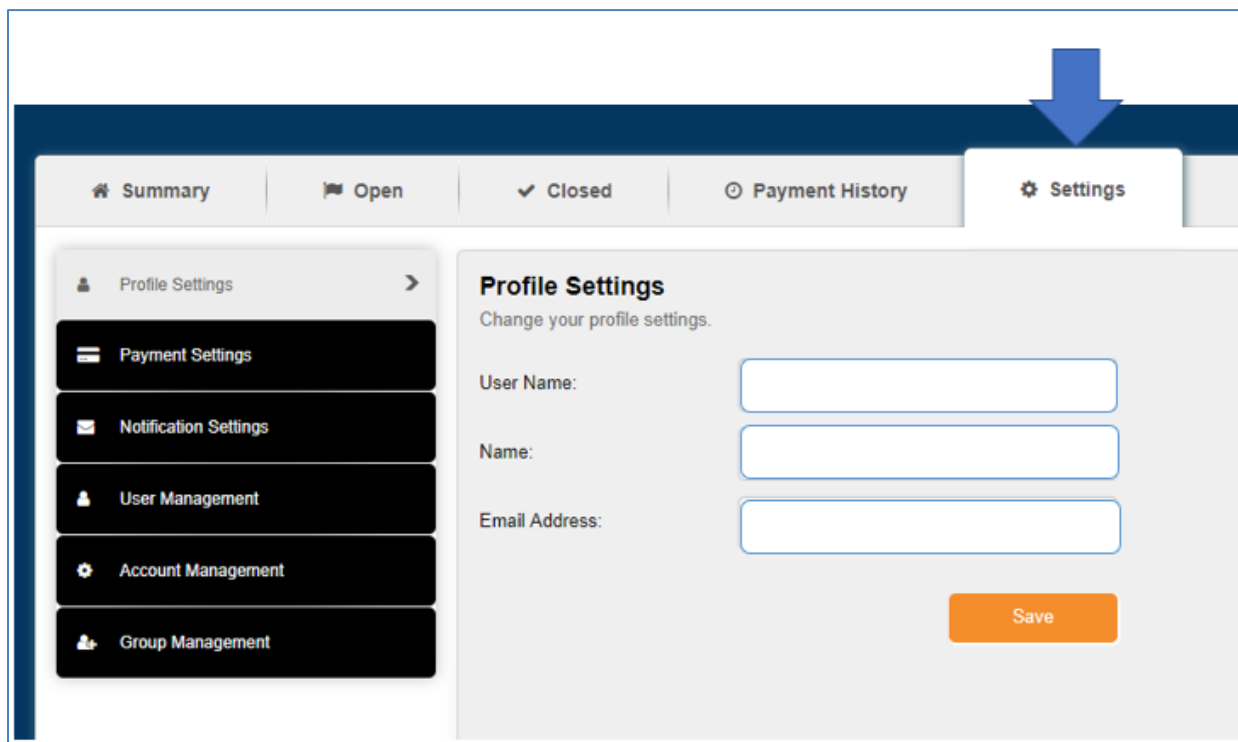
PDF	Note	Group	Acct #	Ship To #	Doc Type	Invoice #	PO Number	Case ID	Bill Date	Inv Amt	Open Balance	District #	Paid Online	Drtd
<input type="checkbox"/>		Default Group	<input type="text"/>		Service/Sales Inv	<input type="text"/>			04/30/2020	250.00	0.00	037	100.00	N

Paid Online ▾

100.00

Manage your settings . . .

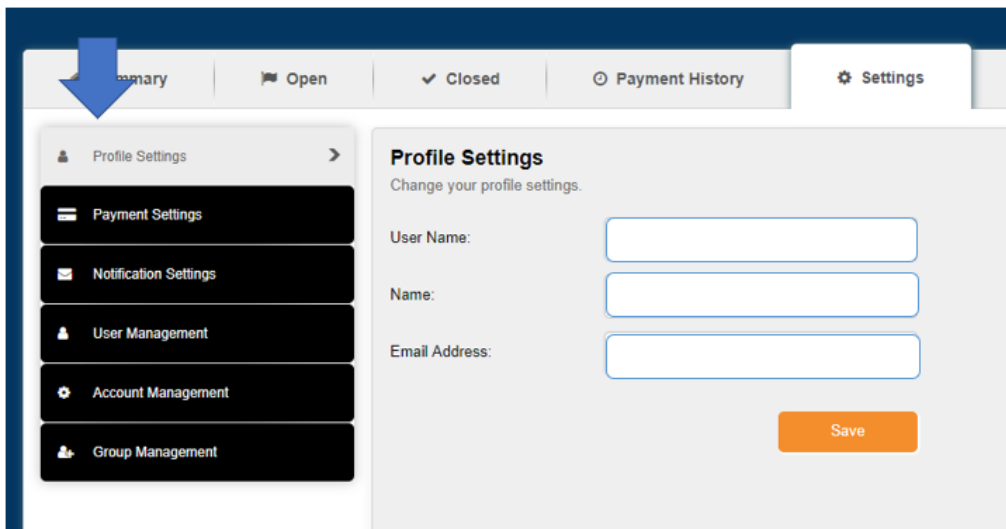
Click the [**Setting**] tab.



From this screen you can:

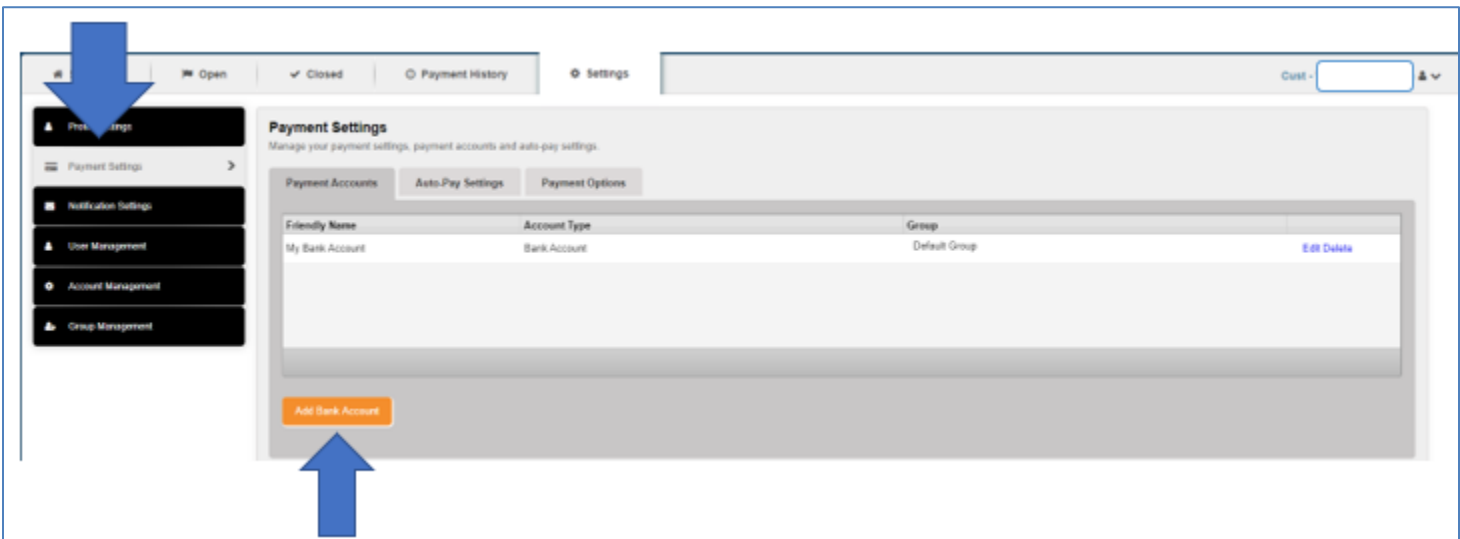
- Change your **Profile Settings**.
- Manage your **Payment Settings**, payment accounts and auto-pay settings.
- Manage your **Notification Settings**.
- **User Management** – Setup new users or edit exiting ones.
- **Account Management** – Add multiple accounts so that you can manage them all at the same time.
- **Group Management** – Setup new groups or manage existing ones. Groups are used to separate users, accounts and payment accounts.

Profile Settings . . .



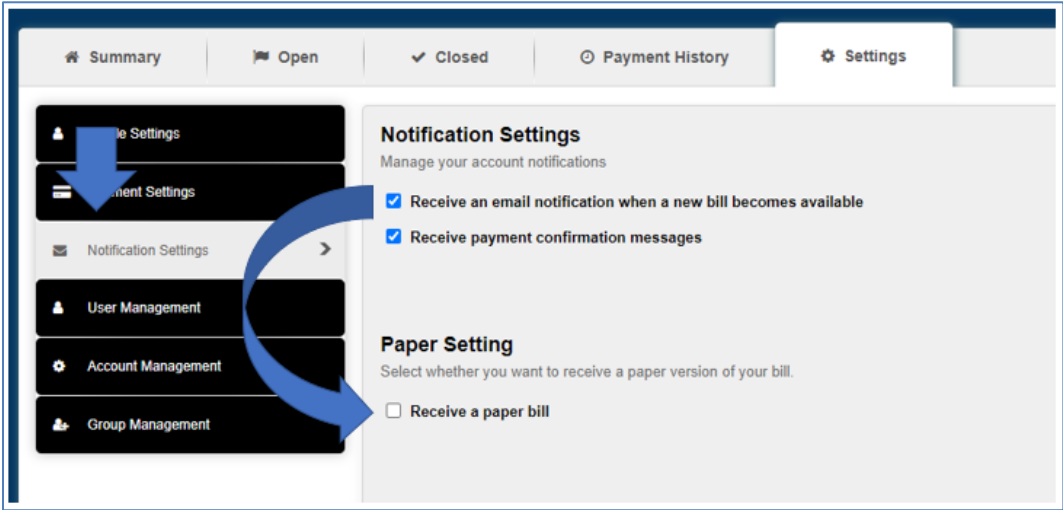
- Make edits to your User Name, Name, and Email Address.
- Click [**Save**].

Payment Settings . . .



- On the **Payment Accounts** tab, click [**Add Bank Accounts**] and follow the prompts on the pop-up screen.
- The payment account must be assigned to at least on group.
 - Select an existing group or check Default Group.
- On the **Payment Accounts** tab, click [**Auto-Pay Settings**]
 - You can Enable this functionality.
 - You can pick the invoice payment date by selecting how many days prior to the invoice due date should the payment be scheduled. It can be anywhere from 0 (Due Date) to 30 days prior.

Notification Settings . . .

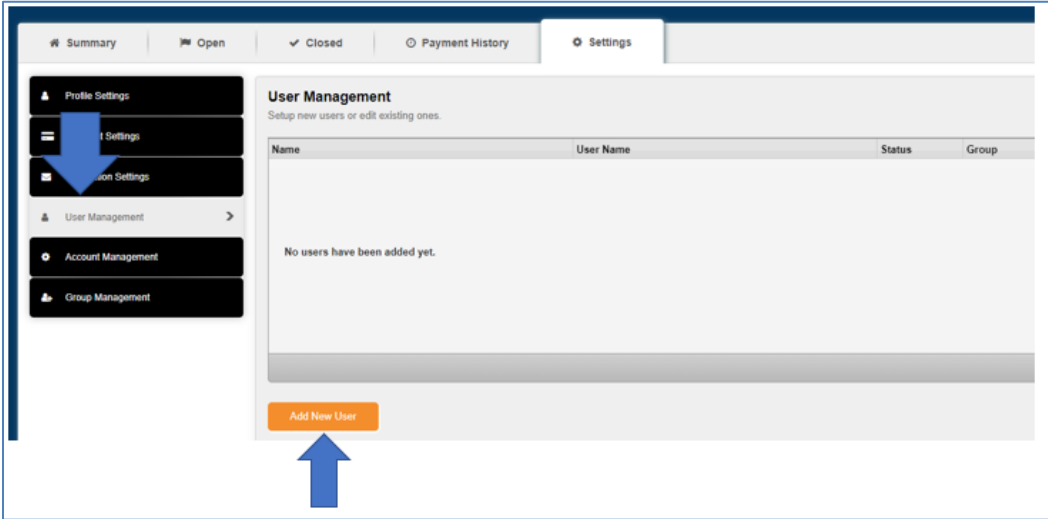


From this screen you can manage your invoice and payment notification.

You can determine if you receive paper invoice copies that are mailed to you.

- Since this customer selected to receive email notification when they receive a new bill, they have opted out of paper invoices.
 - The email notification this customer receives with include a list of all new invoices and a link to their Summary page.
 - From the Summary page they can access the Open tab to view all their new invoices along with any other invoices that are still open.

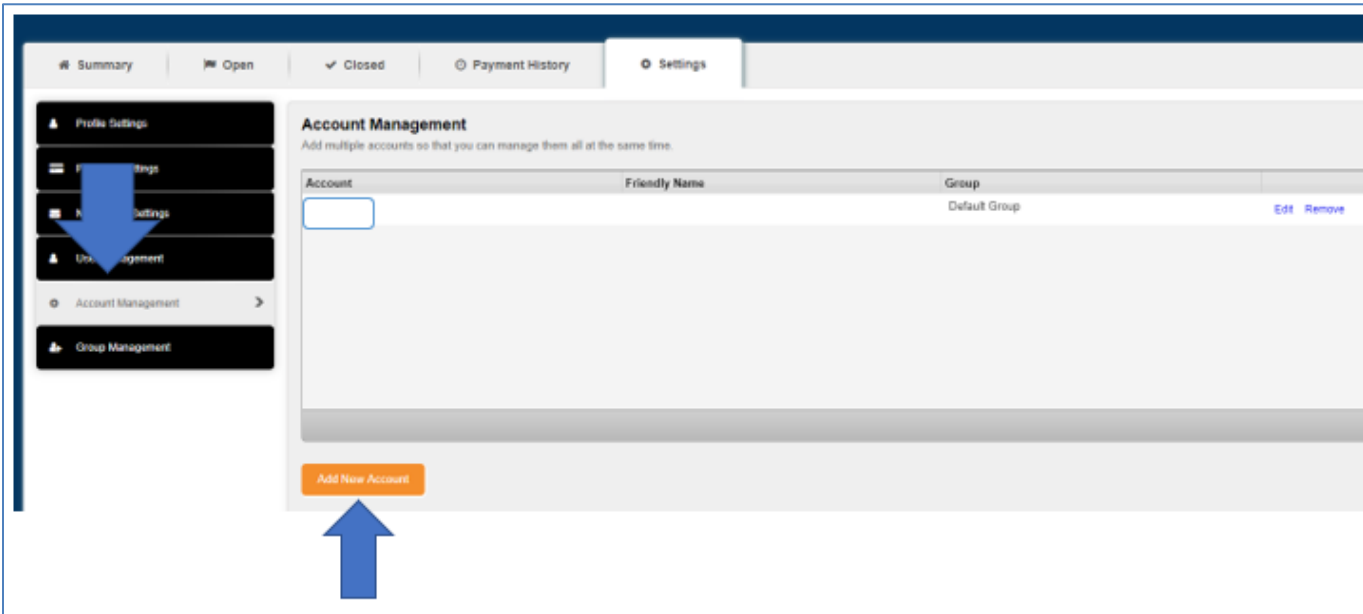
User Management . . .



From this screen you can add additional users to access this account.

- Click the [**Add New User**] tab and follow the prompts.
- You will have the ability to set privileges for each user.
- Each User will need to be added to a group. You may select Default Group.

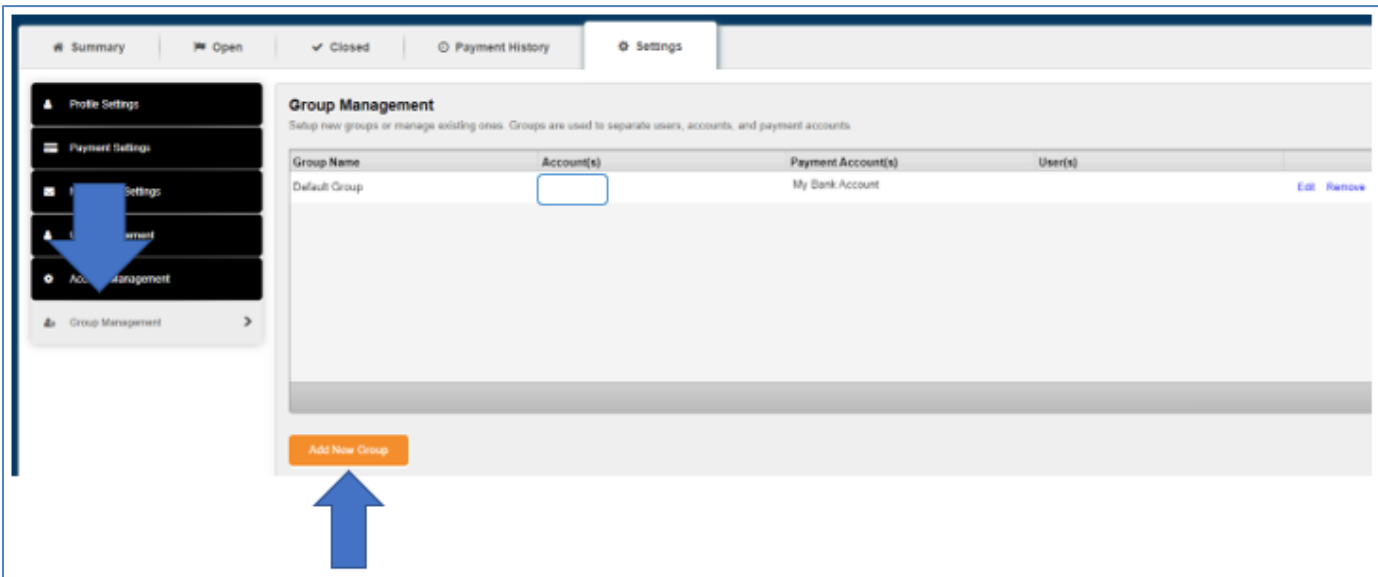
Account Management . . .



From this screen you can add multiple accounts to that you can manage them all at the same time.

- Click the [**Add New Accounts**] tab and follow the prompts.
- Each Account will need to be added to a group. You may select Default Group.

Group Management . . .



From this screen you can set up new groups or manage existing ones. Groups are used to separate users, accounts, and payment accounts.

- Click the [**Add New Group**] tab and follow the prompts.
- These are the groups that you will add to your other settings.