



CONFIDENTIAL BILLING LOG DASHBOARDS

Guidance on how to access confidential
billing log dashboards on MyCority portal.

ACCESSING CONFIDENTIAL BILLING LOG DASHBOARD

As part of your service with us, we utilise confidential billing on our invoices as we understand the need for confidentiality between departments. Your invoice will therefore contain ID numbers instead of employees names to identify the services provided for those individuals in the month invoiced. (*Example provided below*)

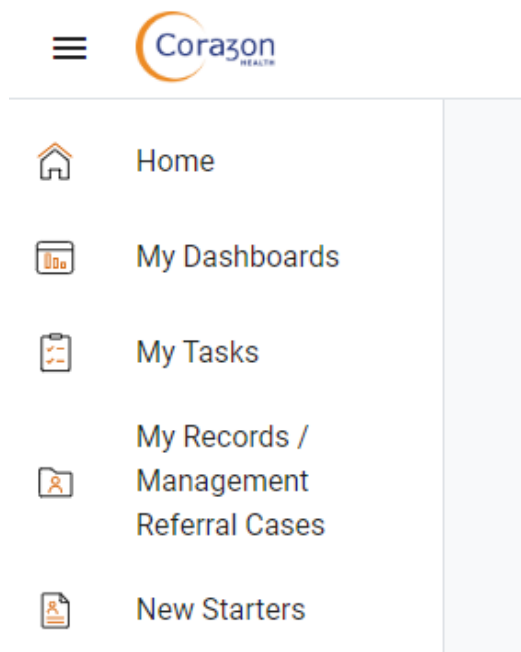
Quantity	Description
3.00	NSQ - 1st Booked Call - patient id 94625, 94519, 94791

Previously the reference log to identify the ID number to the individual was accessed via a separate portal. Following our migration to Cority, the previous confidential billing log dashboards will be turned off and instead you will be able to access the logs on your MyCority portal login.

The ID number that we will now invoice with, starts with an E, for example E12345. The individuals have all been given new ID numbers so please disregard any previous ID numbers that you have kept a log of internally.

To access your reference log upon receipt of your invoice, you will need to navigate to the MyCority portal – <https://corazonhealth.my.cority.com/> and use the log in credentials provided to you/previously provided.

Once you have logged in, please navigate to the menu at the left-hand side of the screen and select My Dashboards.



Depending on your involvement you may have multiple dashboards that you access, so you will need to click the  icon in the top right corner to pick the correct dashboard from the drop-down menu.

The Dashboard is called **“CORZ – Confidential Billing”**

You will be presented with a screen similar to the below:

The screenshot displays the 'CORZ - Confidential Billing' dashboard. The interface includes a sidebar with navigation options: Home, My Dashboards, My Tasks, My Records / Management Referral Cases, and New Starters. The main content area features three data tables:

- CORZ - Confidential Billing - Appointments within previous month(#RW_225)**: A table with columns: Employee ID, Employee Name, Date, Employer, Division, and Site. It shows two appointments for Employee E83884.
- CORZ - Confidential Billing - NSQs Received (Last Month)(#RW_226)**: A table with columns: ID, Employee, Employer, Division, Site, and Date NSQ. It shows two NSQs for Employee E83885.
- CORZ - Confidential Billing Log - (All Employees)(#RW_224)**: A table with columns: Empl ID, First Name, Last Name, Date, Empl Name, Division, Site, and Empl Status. It shows one employee, E83415.

The top left box are the ID numbers for individuals that have had appointments in the previous month and will be present on the most recent invoice.

The box at the top right will be any new starters we have received within the previous month and will be present on the most recent invoice.

Finally, the box at the bottom right will hold a list of all individuals we hold a record of on the system so that you can reference any previous invoices/check for leavers.

You can expand any of the boxes using the  icon in the top right corner of each box. Once you have expanded you can also use Ctrl + P on your keyboard to print as a PDF to download a copy should you require this.



IMPORTANT – the data in the top two boxes will refresh each month on 1st to reflect the new previous month.

If you have previously been registered as a named billing log contact, you should already have access to this dashboard, however should you not have access to this dashboard and require this, please email us on accounts@corazonhealth.co.uk

If you are also missing an ID number that is present on your invoice, or require any further support please contact accounts@corazonhealth.co.uk or call the office on 01223 834404.

**WE ARE HERE TO
SUPPORT YOUR STAFF
AND HELP YOUR
BUSINESS THRIVE.**



Get in touch with us today.

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