

SUMMARY BILLING FILE INFORMATION FORM

NEVER POST LOG ENTRIES TO SUMMARY BILLING FILE NUMBERS, THOSE ENTRIES WILL REJECT

This form is to be used ONLY to:

1. **OPEN** a Summary Billing File. **Never assign an existing File Number, IT WILL REJECT.**
2. **CHANGE** the Summary Billing File: Address, Phone Number, Sort Number and/or File Description.
3. **LINK** file numbers to be summarized to the Summary Billing File Number.
4. **UNLINK** file numbers that you no longer want summarized to this Summary Billing File Number.

TO OPEN OR CHANGE INFORMATION ABOUT A SUMMARY BILLING FILE NUMBER, COMPLETE THE FOLLOWING FILE INFORMATION FORM:

IF YOU ARE LINKING OR UNLINKING FILES TO AN EXISTING SUMMARY BILLING FILE NUMBER, YOU ONLY NEED TO FILL IN YOUR FIRM NUMBER, SUMMARY FILE NUMBER AND THE INFORMATION YOU ARE CHANGING. (ADDRESS AND DESCRIPTION RULES ARE THE SAME AS FOR A REGULAR FILE).

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FIRM# _____ SORT# _____ SUMMARY FILE# _____

	CLIENT NAME AND ADDRESS (40 CHARACTERS & SPACES PER LINE)
1.	
2.	
3.	
4.	
5.	

6.	FILE DESCRIPTION (Use separate box for each letter, spaces, punctuation) PRINT CLIENT'S SURNAME OR BUSINESS NAME FIRST	AREA CODE	TELEPHONE #

SUMMARY STATEMENT MESSAGE. One letter or punctuation mark per box. To make a space between words, leave one box empty. You can remove the message at any time by sending in this photocopied form with "remove" printed in the first 6 boxes.

7.	
8.	
9.	

10. TO LINK FILE NUMBERS TO A SUMMARY BILLING FILE NUMBER:

List the File Numbers here that you want Summarized to the above Summary Billing File. Any number of files can be LINKED at any time.

11. TO UNLINK FILE NUMBERS FROM A SUMMARY BILLING FILE NUMBER:

List the File Numbers here that you **no** longer want Summarized to the above Summary Billing File. Any number of files can be UNLINKED at any time. If you want a file to be Linked to a different Summary Billing File, you do **not** need to **Unlink** the file from the original Summary Billing File - only submit a new form Linking it to the new Summary Billing File Number.

***TO REMOVE THE SUMMARY FILE NUMBER**, just follow the standard file remove procedure. Use **The Log**.