

The background features a hand in a white lab coat pointing at a futuristic digital interface. The interface consists of various icons and data visualizations, including a gear, a first aid kit, a person with a heart, a magnifying glass, a syringe, a pill, and a network diagram. The overall theme is healthcare and technology.

Sandata

Get more right from the start

Connecticut Department of Mental Health and
Addiction Services

Electronic Visit Verification (EVV) Provider Training
Billing Module



Agenda

- Billing Overview
- Not OK to Bill Process
- Getting Ready to Bill
- Creating Invoices
- Creating a Billing Export

Billing Module

The Billing module allows for the review of visits which are eligible for invoicing and visits which are confirmed but still have conflicts.

- Review the confirmed visits for Billing
- Create the invoices
- Review and print Billing Summary report
- Export invoices



Billing Review

- ▶ Click **Billing** from the menu bar.
- ▶ The Billing Review screen displays all visits that have been confirmed for the date range selected.
- ▶ Filters include Payor, Admit Type, Service, Client and Date Range.

The screenshot shows the 'Billing Review' application window. The title bar includes 'Billing Review' and several action buttons: 'Clear Filter', 'Refresh', 'Create Invoices', 'Update', 'Print', and 'Close'. Below the title bar is a 'Search Filters' section with the following fields:

- Admission: [Dropdown]
- Company: [Dropdown]
- Location: [Dropdown]
- Admit Type: [Dropdown]
- Team: [Dropdown]
- Payor: [Dropdown]
- Billing Freq: [Dropdown]
- Rate Plan: [Dropdown]
- Service: [Dropdown]
- Type: [Dropdown]
- Event: [Dropdown]
- Status: [Dropdown]
- Not OK To Bill Reason: [Dropdown]
- Date From: 04/01/2021 [Calendar icon]
- Date To: 04/05/2021 [Calendar icon]
- Time Range: [Input]
- Weekday: [Grid of checkboxes]
- Show Only Items OK To Bill
- Show Only Items NOT OK To Bill
- Show As Summary

On the right side, there is a calendar for April 2021. The calendar shows the days of the week (Su, Mo, Tu, We, Th, Fr, Sa) and the dates. The date 04/05/2021 is highlighted in blue.

Investigate Not OK to Bill

1. Specify the date range for billing.
2. Check **Show Only Items NOT OK to Bill**.
 - ▶ Displays confirmed visits for which invoices cannot be created.
3. Click the **Update** button to apply latest changes (authorizations, new rates, etc...) to the visits.
 - ▶ The *NOT OK to Bill* reason must be cleared in order for an invoice to be created for the visit.

The screenshot shows the 'Billing Review' application window. The title bar includes 'Billing Review' and several action buttons: 'Clear Filter', 'Refresh', 'Create Invoices', 'Update', 'Print', and 'Close'. The 'Update' button is highlighted with a green circle and the number '3'. Below the title bar is a 'Search Filters' section with various dropdown menus and input fields. The 'Date From' field is set to '03/22/2021' and the 'Date To' field is set to '03/28/2021', both highlighted with a green circle and the number '1'. The 'Show Only Items NOT OK To Bill' checkbox is checked and highlighted with a green circle and the number '2'. On the right side, there is a calendar for March 2021, with the date '22' highlighted in blue and a green circle and the number '3' next to it. The calendar shows the following dates: 28, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 31, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10.



Getting Ready to Bill

In order to be “**OK to Bill**” visits must meet the following criteria:

- ▶ Valid Authorization (if required by payer).
- ▶ Service was provided according to the authorization.
- ▶ Caregiver call times match the schedule or in the case of an exception, the visit was manually confirmed.
- ▶ A primary diagnosis was entered in the recipient’s profile (if required by payer).



Holding a visit from Billing

A visit that is 'OK to Bill' can be held from billing if additional review or adjustment is needed. From the Billing Review screen:

- ▶ Locate the confirmed visit which needs to be held from billing
- ▶ Left click to highlight the visit line
- ▶ Right click on the highlighted line and choose: **Set Status > Hold**
- ▶ Select the appropriate Change Reason

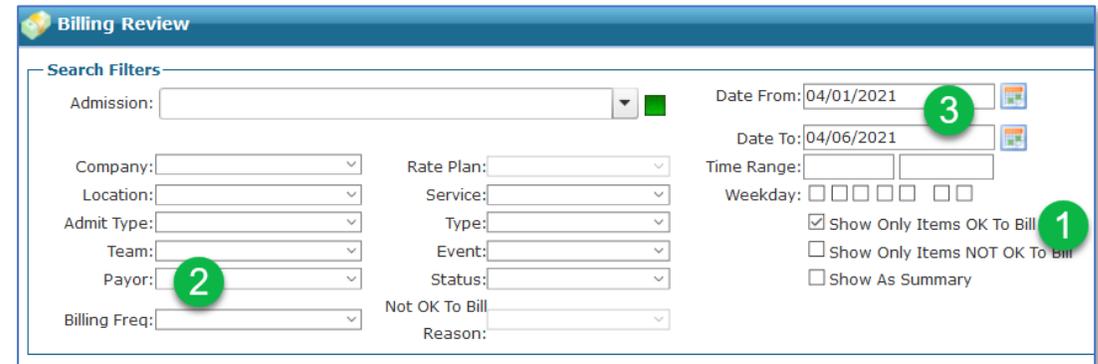
The screenshot shows the 'Billing Review' interface. At the top, there are search filters for Admission, Date (06/08/2016 to 06/27/2016), Company, Location, Admit Type, Team, Payor, Billing Freq, Rate Plan, Service, Type, Event, Status (02- Confirmed), and Not OK To Bill Reason. Below the filters is a table with columns: Date, Client, ChartID, Service, EC, IN, OUT, TZ, Qty, Units, Rate, Flags, Amt, Copay, Supplies, Status, PRN, Override, and Auth No. The table contains three rows of data for visits on 06/08/2016, 06/09/2016, and 06/10/2016. A context menu is open over the second row (06/09/2016), showing options: Open, Select All, Select None, View, and Set Status. The 'Set Status' option is expanded, showing a list of status options: 01- Pending, 02- Confirmed, 09- Hold, and 10- Cancelled. Red circles with numbers 1 and 2 are placed over the 'Set Status' and '09- Hold' options respectively.

Date	Client	ChartID	Service	EC	IN	OUT	TZ	Qty	Units	Rate	Flags	Amt	Copay	Supplies	Status	PRN	Override	Auth No
06/08/2016	BASKIN, MARY	W0000012-MB3	SS125-05	DEF	11:00	13:00		8.00	8	\$5.20		\$0.00	\$0.00		02- Confirmed			
06/09/2016	BASKIN, MARY	W0000012-MB3	SS125-05	DEF	11:00	13:00		8.00	8	\$5.20		\$0.00	\$0.00		02- Confirmed			
06/10/2016	BASKIN, MARY	W0000012-MB3	SS125-05	DEF	11:00	13:00		8.00	8	\$5.20		\$0.00	\$0.00		02- Confirmed			

Creating Invoices

From the Billing Review screen:

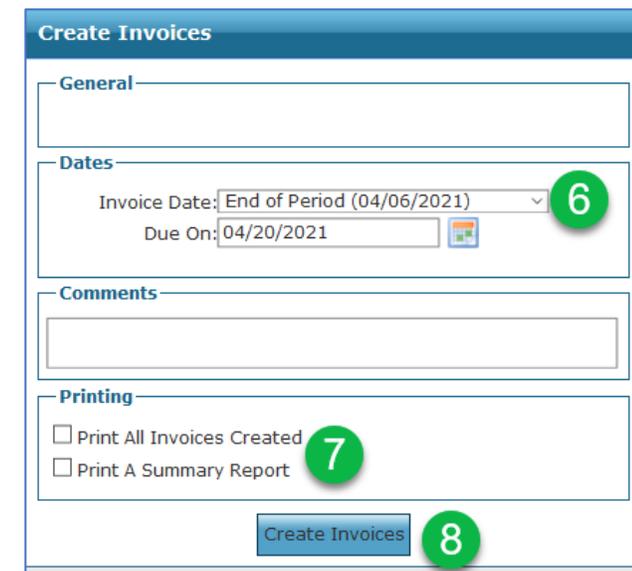
1. Select **Show Only Items OK to Bill**
2. Select the Payor
3. Select billing date range
4. Run **Update**
5. Click **Create Invoices**
6. Set Invoice Date
7. Select **Print A Summary Report**
 - **Print All Invoices Created** can be selected for paper billing



The screenshot shows the 'Billing Review' window with search filters. The 'Date From' field is set to 04/01/2021 and 'Date To' is 04/06/2021. The 'Show Only Items OK To Bill' checkbox is checked. The 'Payor' dropdown is highlighted with a green circle 2. The 'Date From' and 'Date To' fields are highlighted with green circles 3. The 'Show Only Items OK To Bill' checkbox is highlighted with a green circle 1.



The screenshot shows the toolbar of the 'Billing Review' window. The 'Create Invoices' button is highlighted with a green circle 5. The 'Update' button is highlighted with a green circle 4.



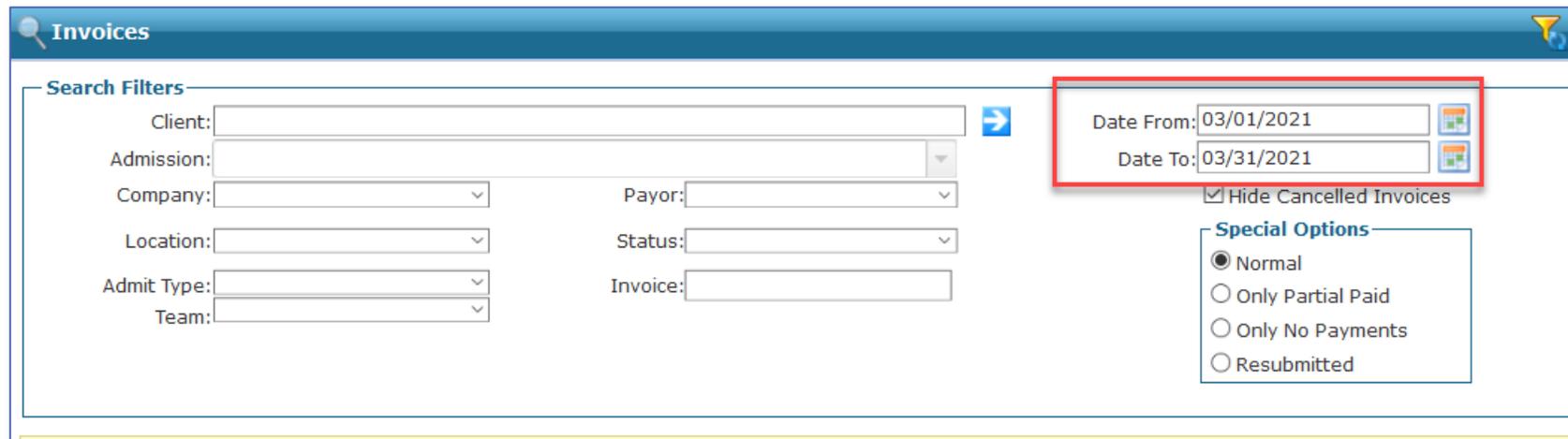
The screenshot shows the 'Create Invoices' dialog box. The 'Invoice Date' dropdown is set to 'End of Period (04/06/2021)' and is highlighted with a green circle 6. The 'Due On' field is set to 04/20/2021. The 'Print A Summary Report' checkbox is checked and highlighted with a green circle 7. The 'Create Invoices' button is highlighted with a green circle 8.



Reviewing Invoices

From the **Billing** drop-down menu, click **Invoices**

Search Filter From and To Dates: *Use the Age As of Date*

A screenshot of the 'Invoices' search filter interface. The 'Date From' and 'Date To' fields are highlighted with a red rectangular box. The 'Date From' field contains '03/01/2021' and the 'Date To' field contains '03/31/2021'. Below these fields is a checked checkbox for 'Hide Cancelled Invoices' and a 'Special Options' section with radio buttons for 'Normal', 'Only Partial Paid', 'Only No Payments', and 'Resubmitted'. Other search filters include Client, Admission, Company, Location, Admit Type, Team, Payor, Status, and Invoice.

Billing Export

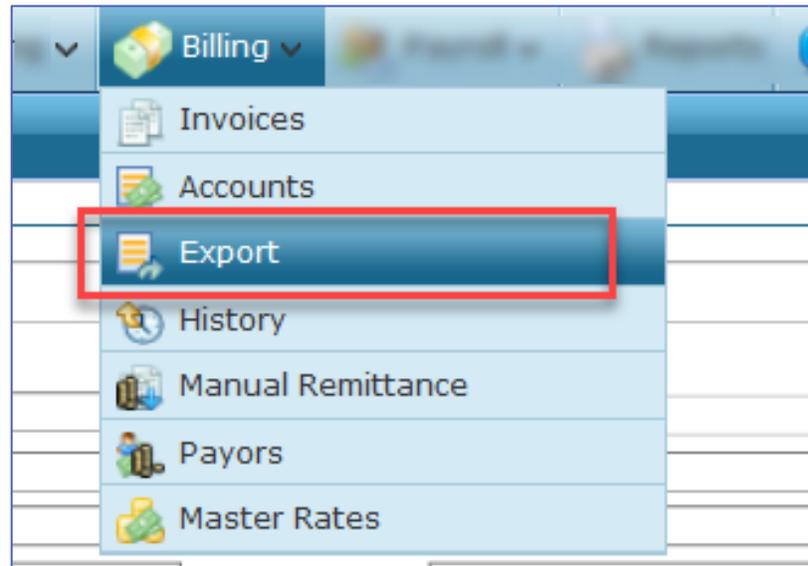


Email it



Billing Export

- ▶ The **Billing Export** screen is where the electronic invoice file is created.
- ▶ Hover your mouse over the Billing icon and select **Export** from the drop-down menu.



How to Export

1. Select the invoice date range to be exported
2. Select the Payor if not defaulted
3. Check the 'Show Only Billable Items' box
4. Click Refresh to view results
5. Click **Export** button, when ready (*choosing 'Send As Test' will create the export file without changing the status of the visit*).
6. Click OK to export file pop-up and save it to your computer for uploading

The screenshot shows the 'Billing Export' window with the following elements and callouts:

- 1**: Callout pointing to the 'Date From' field (03/01/2021).
- 2**: Callout pointing to the 'Payor' dropdown menu (Medicaid).
- 3**: Callout pointing to the 'Show Only Billable Items' checkbox (checked).
- 4**: Callout pointing to the 'Refresh' button.
- 5**: Callout pointing to the 'Export' button.

Other visible elements include: 'Clear Filter', 'Print', and 'Close' buttons; 'Search Filters' section with fields for Client, Company, Location, Admit Type, Team, Region, Status, Format (CSV), Provider ID, and FileName (EXP20210406003.CLM); and a calendar for April 2021.

« April 2021 »						
Su	Mo	Tu	We	Th	Fr	Sa
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	1
2	3	4	5	6	7	8



Billing History

Once claims have been exported, the exports can be reviewed from the Billing History screen.

1. Hover over the Billing icon and click **History**
2. Click the (+) icon next to the folder to display or hide contents
3. Click to select an Export
 - ▶ **Claims** tab shows invoices that are part of the claim
 - ▶ **Raw File** tab shows the actual formatted text file that was exported



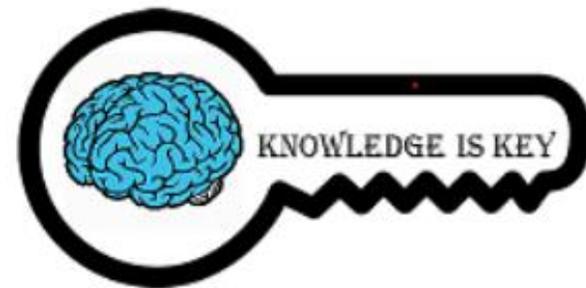
The screenshot shows the 'Export History' application window. On the left is a tree view with folders: Billing (expanded), Blue Cross Blue Shield, Medicaid, 2021 (expanded), March, 3/7/2021 (2), Non Medical, Eligibility, Oasis, Payroll (expanded), and CAHPS. The main area is titled 'Export Details' and shows: Date: 3/7/2021, Payor: [redacted], Records: 2, File Name: EXP20210307001.CLM. Below this are two tabs: 'Claims' (selected) and 'Raw File'. The 'Claims' tab displays a table with the following data:

Date	Client	Chart ID	Invoice	Items	Amount	Comments
03/03/2021	Bartlett, Jed	NYC0201540-MCD	000000519	1	\$15.52	
03/03/2021	Bates, Jimmy	NYC0201615-MCD	000000520	1	\$16.32	

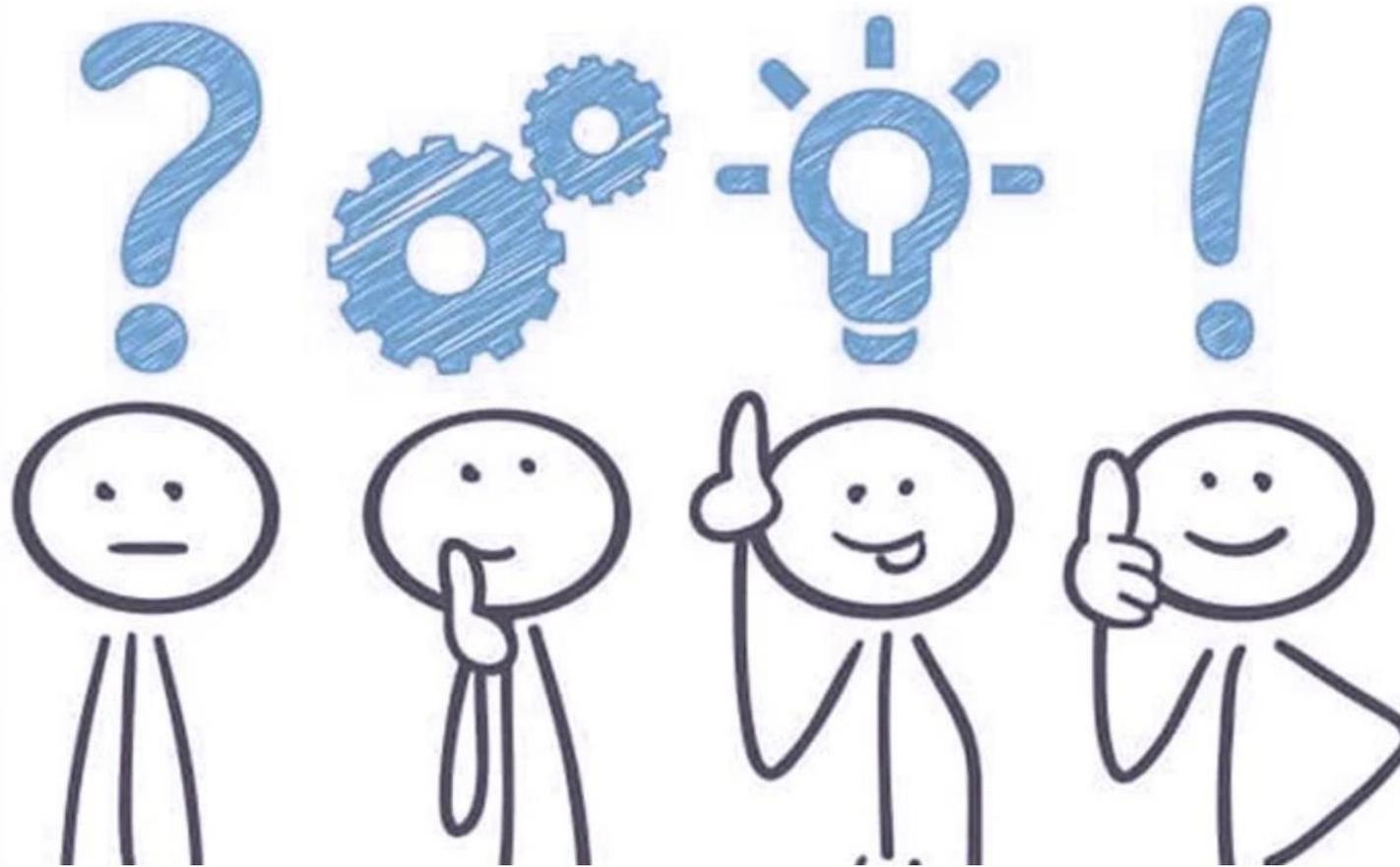


What You Have Learned

- ▶ Accessing the Billing Module and reviewing visits
- ▶ How to investigate 'Not OK to Bill Visits'
- ▶ 'OK to Bill' Schedules and the required criteria
- ▶ How to Create Invoices
- ▶ How to Create an Electronic Invoice File via the Billing Export screen
- ▶ How to Export
- ▶ How to Review Claims Once Exported



Questions



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