Sandata

Get more right from the start

Connecticut Department of Mental Health and Addiction Services

Electronic Visit Verification (EVV) Provider Training Billing Module

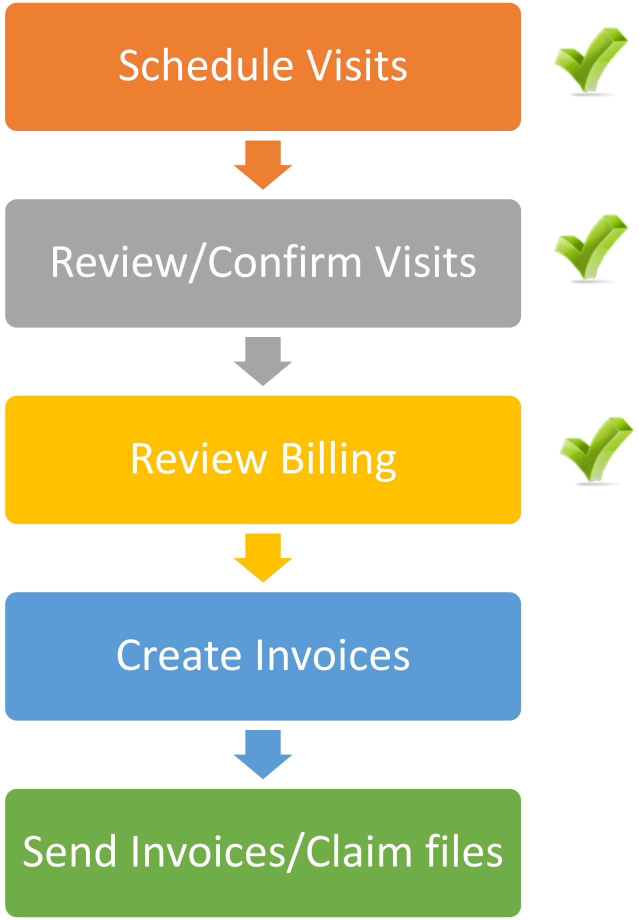
Agenda

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

Billing Module

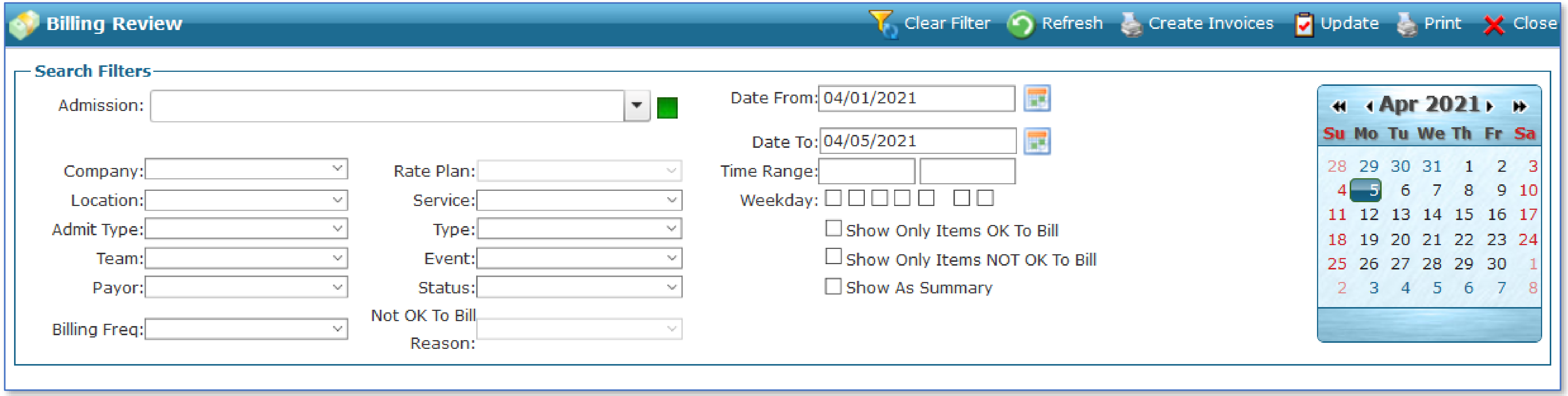
The Billing module allows for the review of visits which are eligible for invoicing and visits which are confirmed but still have conflicts.

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



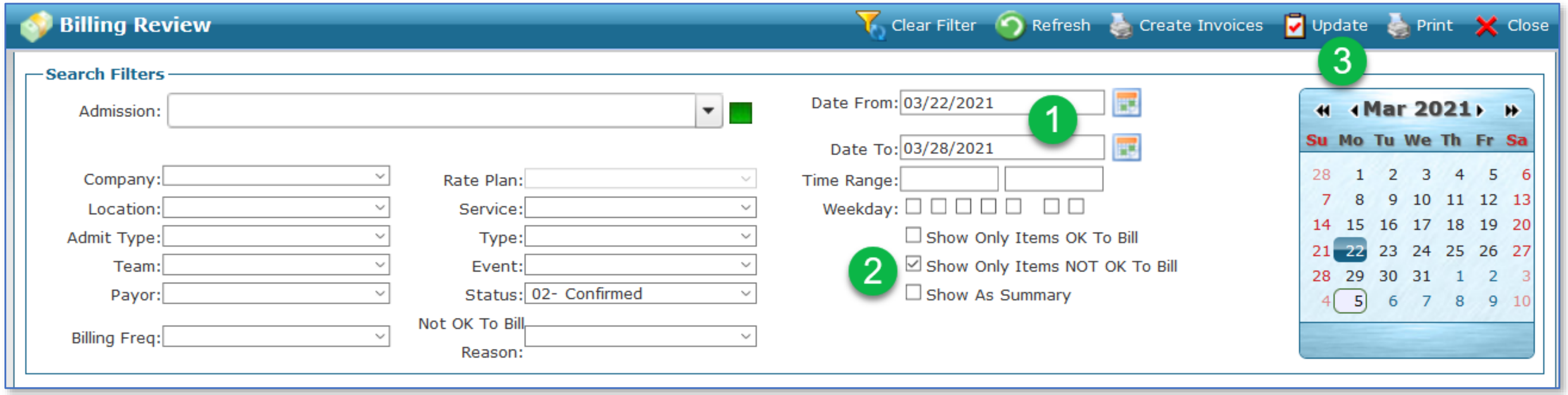
Billing Review

- 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.



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.



Getting Ready to Bill

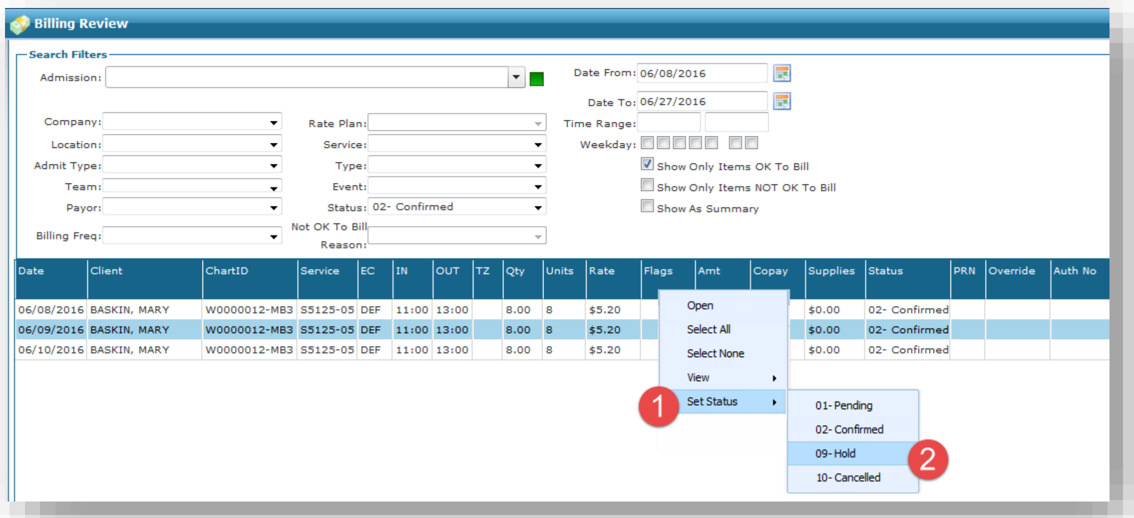
In order to be "**OK to Bill**" visits must meet the following criteria:

- 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:

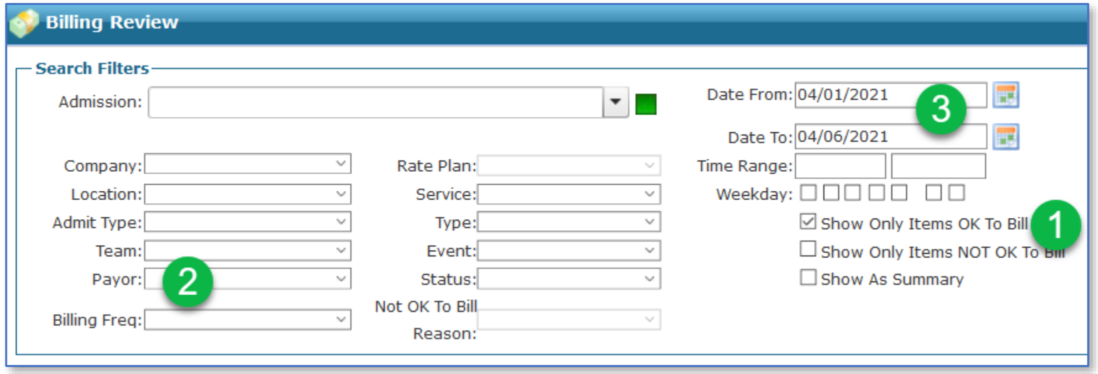
- Locate the confirmed visit which needs to be held from billing
- Left click to highlight the visit line
- Right click on the highlighted line and choose: Set Status > Hold
- Select the appropriate Change Reason

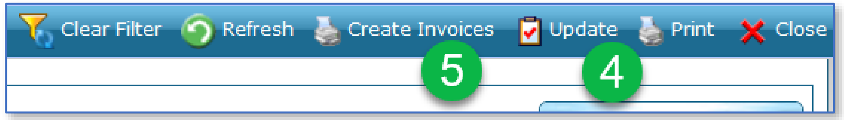


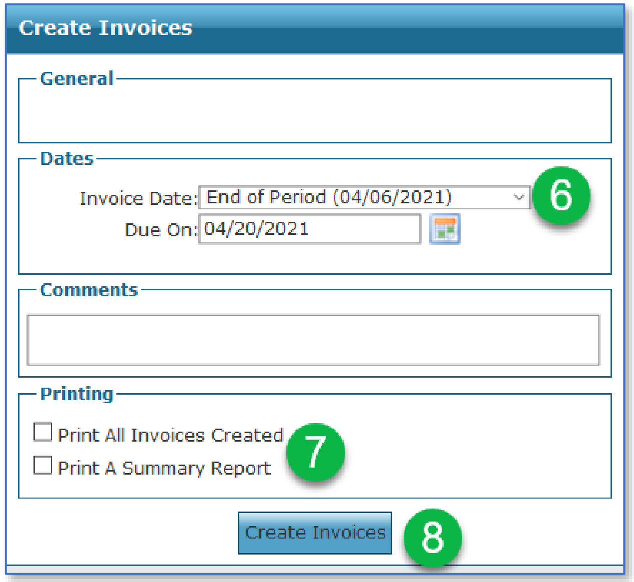
Creating Invoices

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



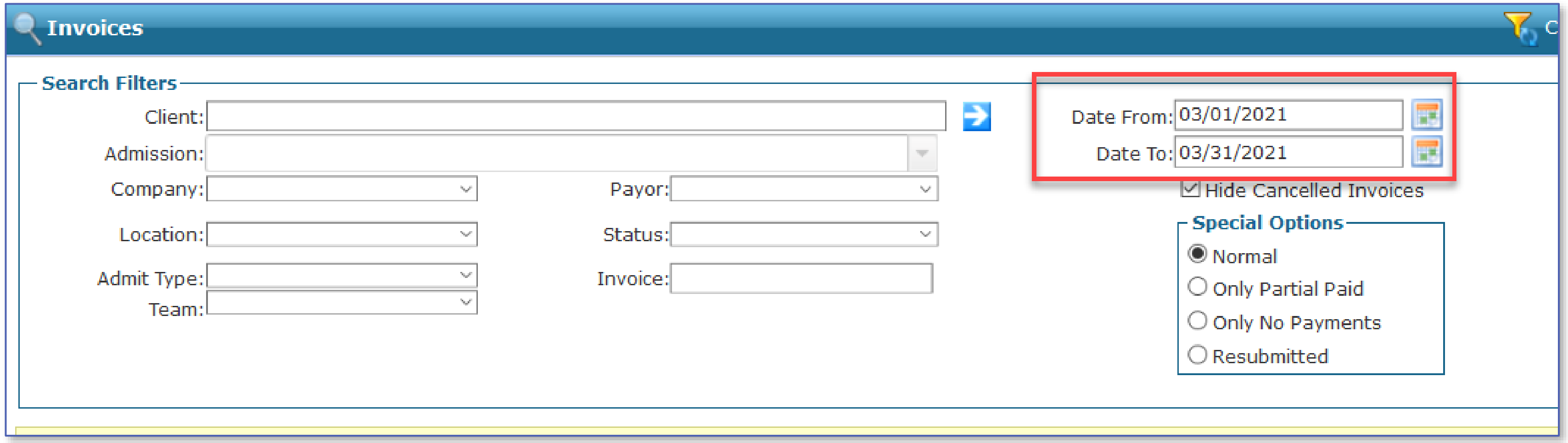




Reviewing Invoices

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

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

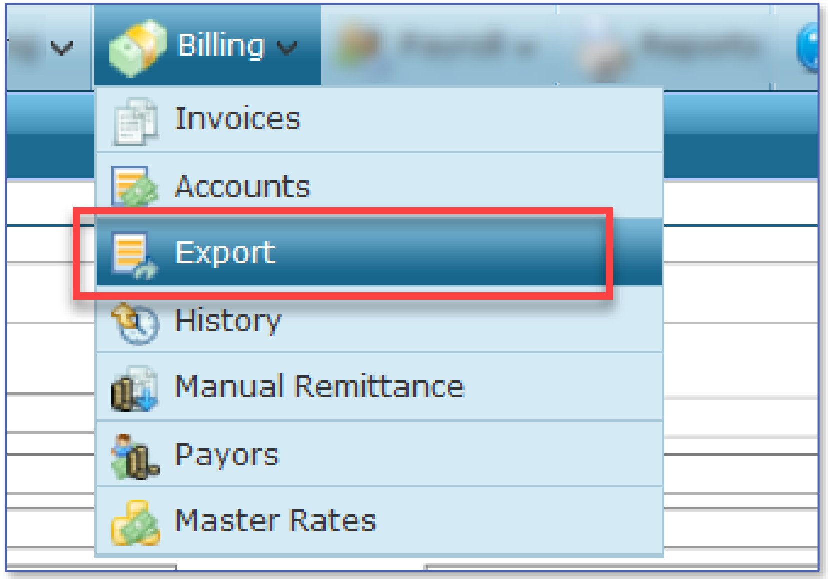


Billing Export

Email it

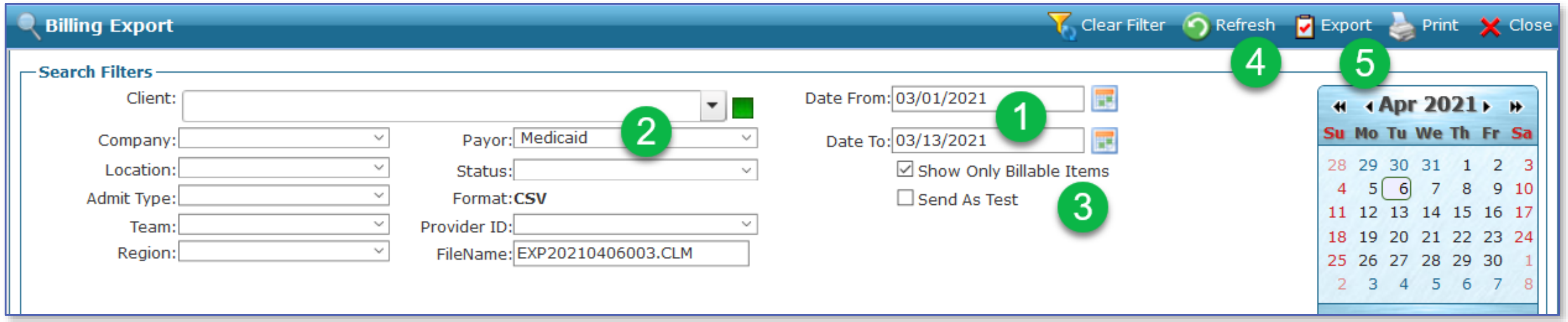
Billing Export

- 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

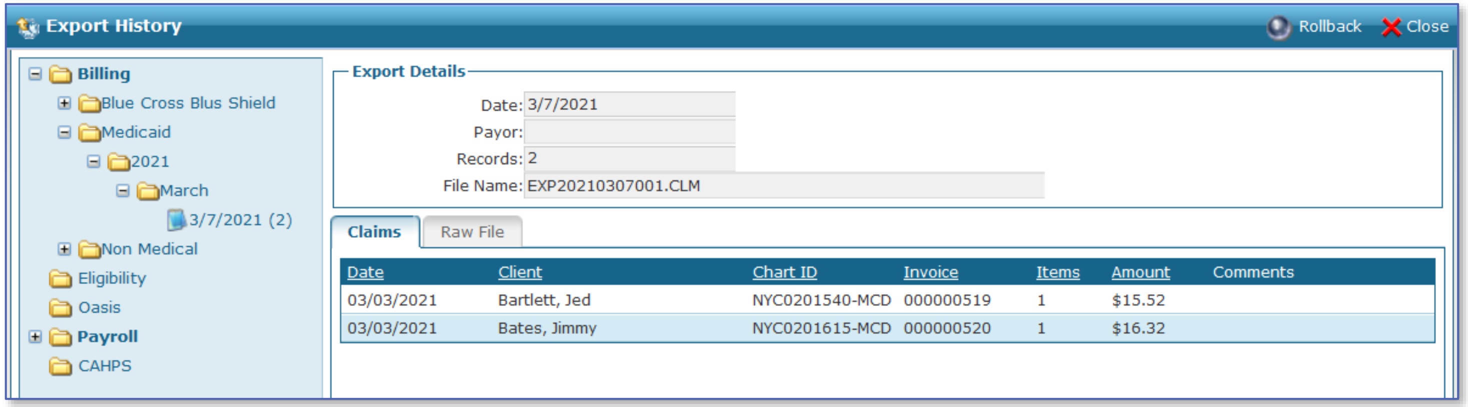
1. Select the invoice date range to be exported
2. Select the Payor if not defaulted
3. Check the 'Show Only Billable Items' box
4. Click Refresh to view results
5. Click **Export** button, when ready *(choosing 'Send As Test' will create the export file without changing the status of the visit).*
6.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



Billing History

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

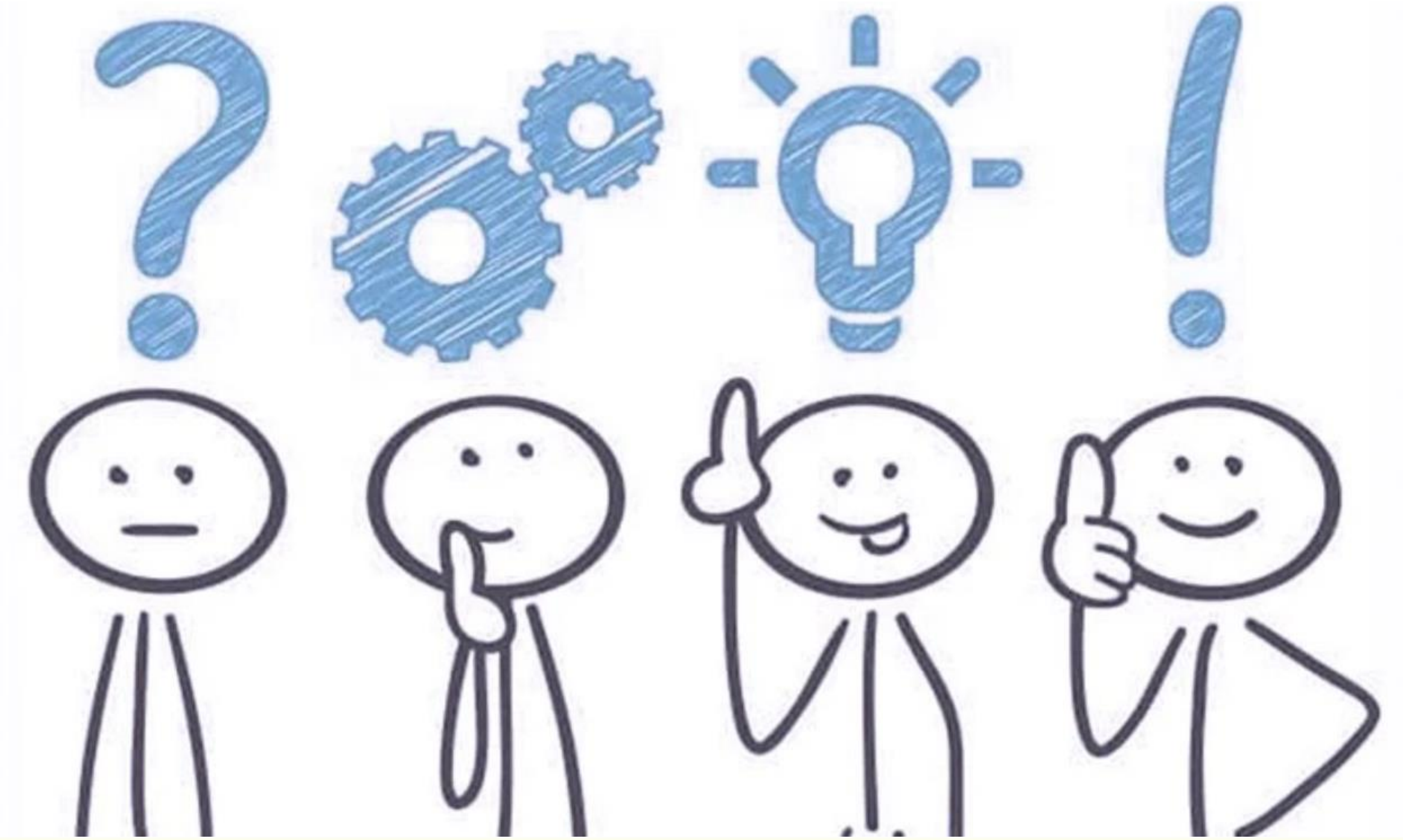
1. Hover over the Billing icon and click **History**
2. Click the (**+**) icon next to the folder to display or hide contents
3. Click to select an Export
   - **Claims** tab shows invoices that are part of the claim
   - **Raw File** tab shows the actual formatted text file that was exported



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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