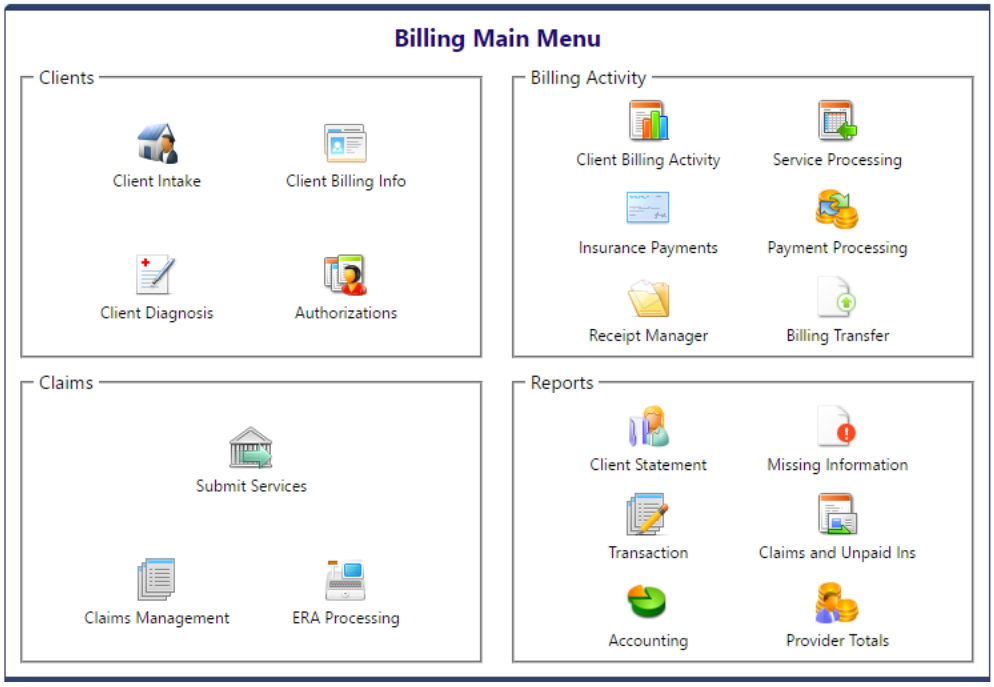
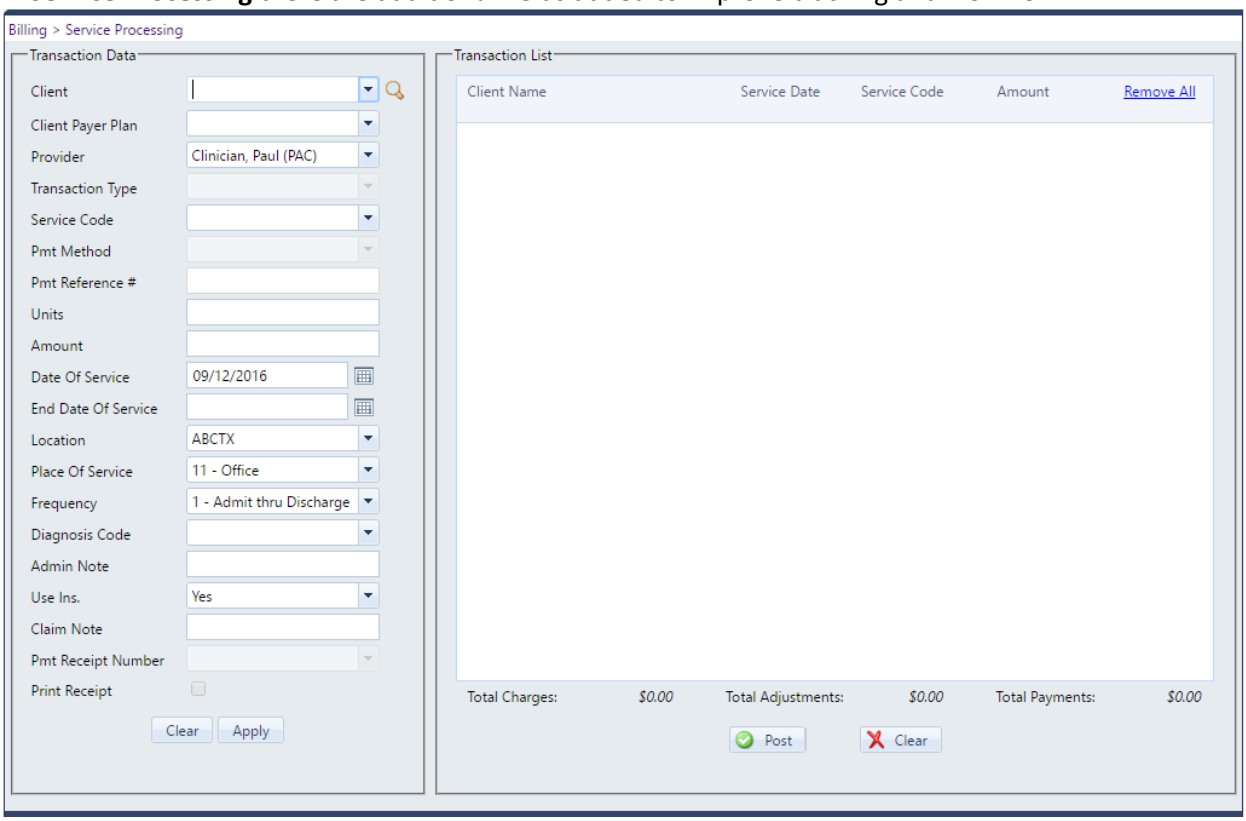
AccuCare 9.8J Release Notes – Billing Enhancements

1. **Billing Main Menu** has been updated with some additional icons to accommodate new features and some icons have been moved to better represent the workflow.



- The Client Billing Information icon has changed, this is now the New Client Billing Information module. This helps centralize workflow when gathering data on the client.
- The Client Insurance Information has been removed (because it is now included in the new Client Billing Info)
- Client Billing Activity module has been added to replace the Transaction Register. This allows an overview of all transactions and payments in one module with ability to filter and edit transactions. The Transaction Register icon has been removed.
- The Billing Transfer icon has been moved to the Billing Activity section of the main menu
- The Submit Services has been added and has combined the Prepare the Claims and Submit Claims. The Prepare Claims and Submit Claims icons have been removed.
- A new Receipt Manager icon has been added to the Billing Activity section of the main menu. The Receipt Manager allows users to track, view and print all receipts.

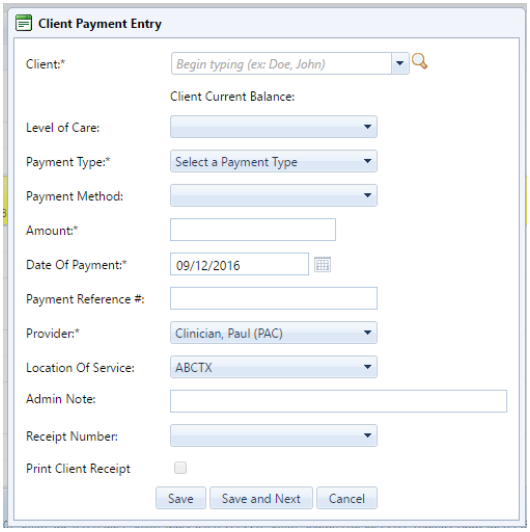
2. In **Service Processing** there are additional fields added to improve tracking and workflow.



New fields added include:

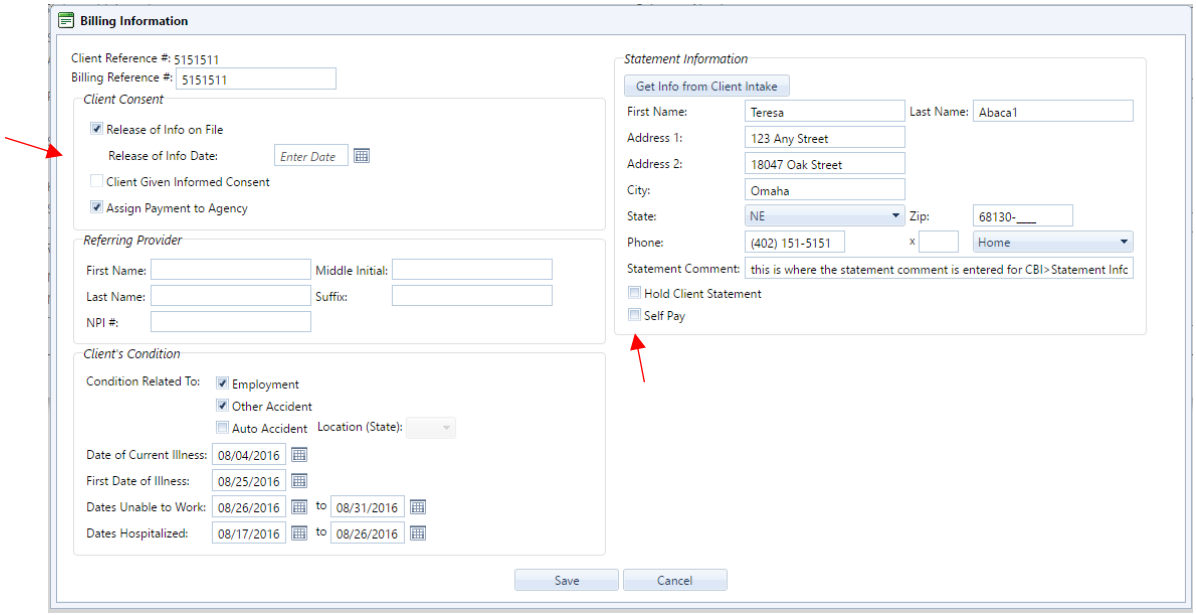
- Payer Plans on the service level
- Payment Method
- Payment Reference Number
- Admin Note
- Receipt Number is tracked for client payments.
- Client Receipts can now be printed from a Customer Payment that is posted

3. **Client Payment Entry** (in Scheduler) – additional fields and features were added:
    - Display's the Client's Current Balance while the payment is being entered.
    - Select Level of Care, Payment Method, Payment Reference Number, Admin Note
    - Assigns Receipt Number with ability to print
    - Payments made are directly processed to the client's balance

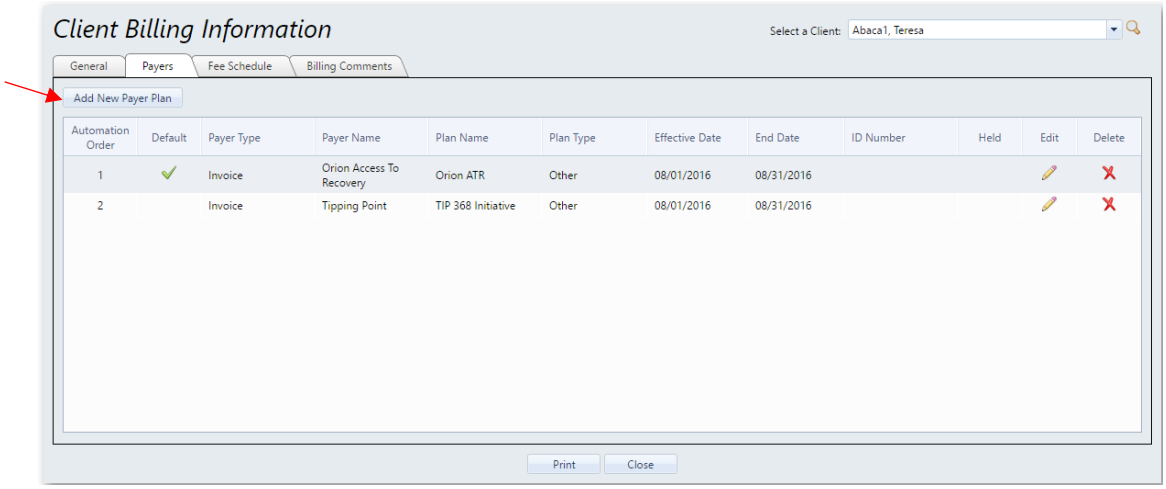


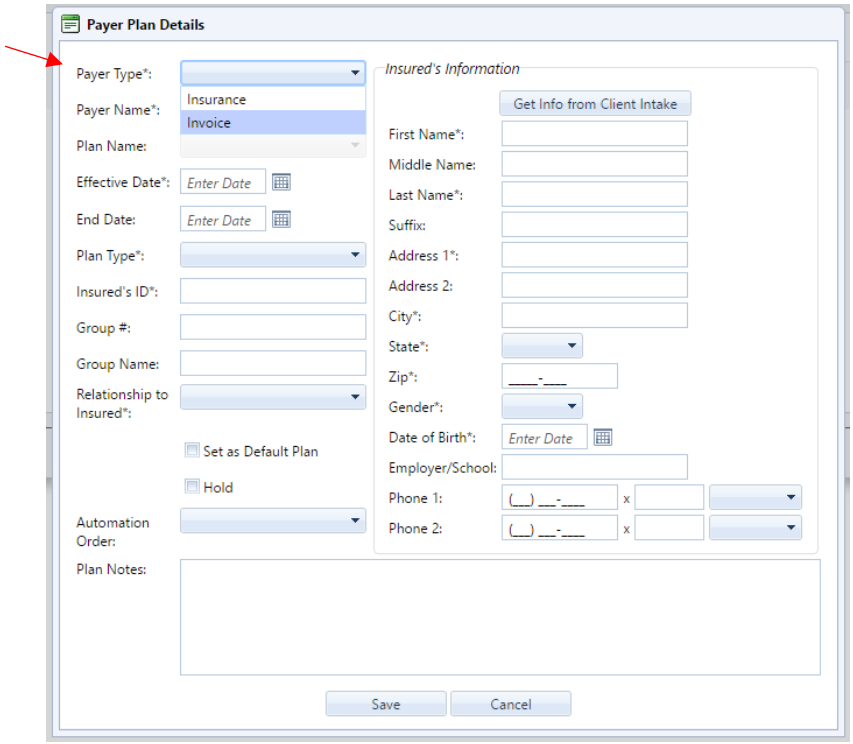
4. The new **Client Billing Information** feature consolidates former billing information collected for the client into one dialogue to help streamline the billing intake process. After creating a new client in Client Intake, the user can add billing information through the Client Billing Information module, as well as adding payer information and individual Fee Schedules.

The **General** tab contains the same information from the previous Client Billing Information screen. The Release of Information on File and the Assign Payment to Agency has been changed from drop down lists to check boxes. They are by default now checked when the Client Billing Information recorded is generated. There is a "Self Pay" checkbox to identify clients that are Self-Pay.

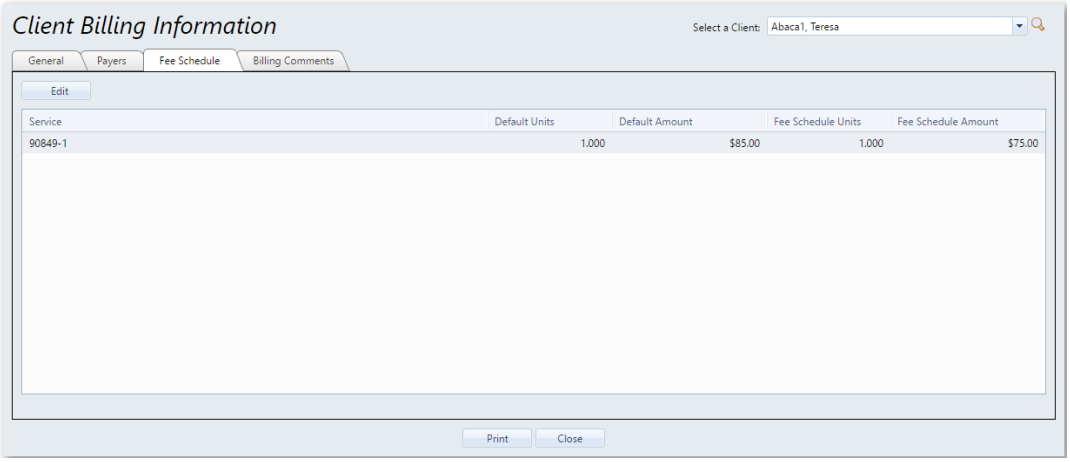


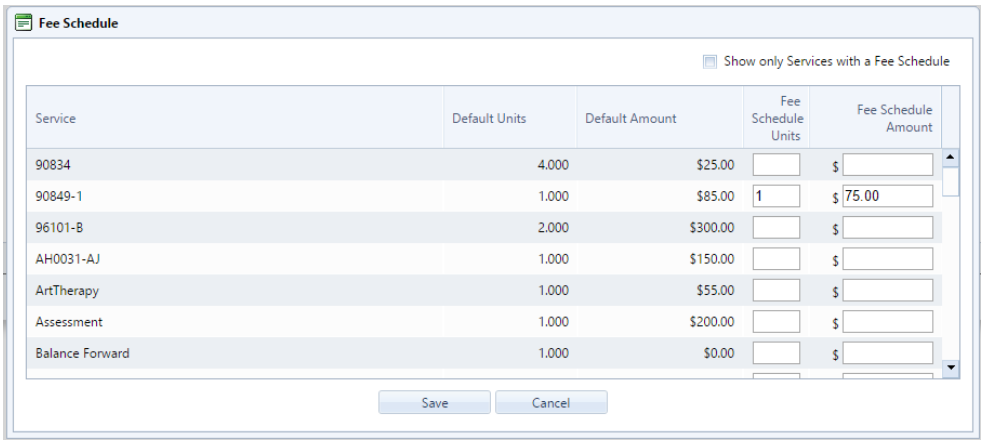
The **Payers** tab (formerly the Client Insurance Information screen) allows insurance and now features non-insurance plans (Invoice plans) to be assigned to a client. If a Contract Rate has been set up for a Payer, the contract rate can be assigned a client's payer setup (Plan Name). There is now the ability to have multiple payer plans that are using the same date range. Client Payer Plans can have a default plan assigned for a client. Client Payer Plan can have an automation order to allow the service to be automatically flow from one payer to another



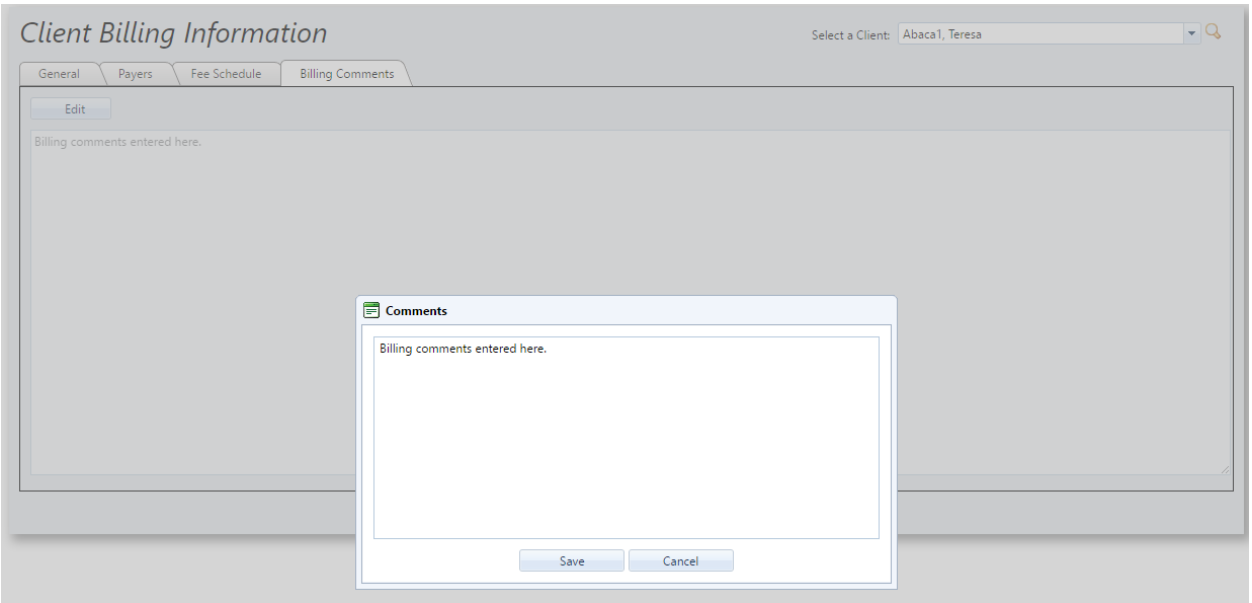


The **Fee Schedule** tab is a new feature that allows unit and amount overrides for services for an individual client.





The **Billing Comment** tab is the existing comment section from the previous Client Billing Information.



5. Enhancements to **Billing Transfer** should improve in usability and workflow.

Billing > Billing Transfer

Filters

Choose Clients: Begin typing...

Choose Filter(s): Select a filter

Date of Service: All Dates / Date Range Enter a Start Date to Enter an End Date

Apply Filters | Clear Filters | Display All

Set All Transfer Status:

Client	Client Name	Date of Service	Payer Plan	Provider	Location	DxCode	Service	Place	Units	Amount	Use Ins.	Claim Note	Source	Check In Status	Transfer Status
	Abaca1, Teresa	08/26/2016	OATR(Orion A	Billingclinician	ABCTX		Assessment	11 - Office	1.000	$200.00	Yes		Progress Note		Later
	Abaca1, Teresa	09/02/2016	OATR(Orion A	Billingclinician	ABCTX						Yes		Scheduler	Attended	Later
	Abaca2, John	09/02/2016	Aetna14079-0	Billingclinician	ABCTX		ArtTherapy	11 - Office	1.000	$55.00	Yes		Scheduler	Attended	Later
	Banana, Hannah	02/01/2016	OptumNM-02	Remm, Beverl	BeverlyR	F55.8		11 - Hospital,			Yes		Scheduler	Attended	Later
	Banana, Hannah	06/24/2016	OptumNM-02	Remm, Beverl	BeverlyR	F55.8		11 - Office			Yes		Scheduler	Confirmed	Later
	Williams, Ted	08/24/2016	AnthemWI-08	Gormley, Curt	Best Treat	G24.02	Assessment	11 - Office	1.000	$200.00	Yes		Scheduler	Attended	Now
	Williams, Ted	09/01/2016	AnthemWI-08	Gormley, Curt	Bfast@Tiff	G24.02					Yes		Scheduler	Attended	Later
	Zigler, Georgia	09/01/2016	AHCCCS-08/2	Remm, Beverl	BeverlyR		IOP Psych	11 - Hospital,	2.500	$500.00	Yes		Scheduler	Attended	Later

- Customer Payments will no longer go to the Billing Transfer from Scheduler to be reviewed before being posted as a transaction/activity in billing. When a Customer Payment is saved in the Client Payment Entry in Scheduler, it will be immediately saved as a transaction in the new Client Billing Activity feature.
- The rows display the client's default payer plan on the row and location of the appointment (if applicable)
- Displays check-in status when the service has been transferred from a Progress Note and originated in from the Scheduler

6. The new **Client Billing Activity** module has replaced the previous Transaction Register module. All existing Transactions are displayed in this area, including Insurance and Client payment details. Users can also filter, edit and delete activities related to a client or transaction or insurance payment. Adding transactions/payments from this module is allowed, as well as access to the Client Information Report. There is a drop down list to let the user choose what columns to display on the screen.

Billing > Client Billing Activity

Select

Client Name: Begin typing...

Choose Filter(s): Select a filter

Show Columns: All items checked

Select By: Date of Service

All Dates / Date Range Start Date to End Date

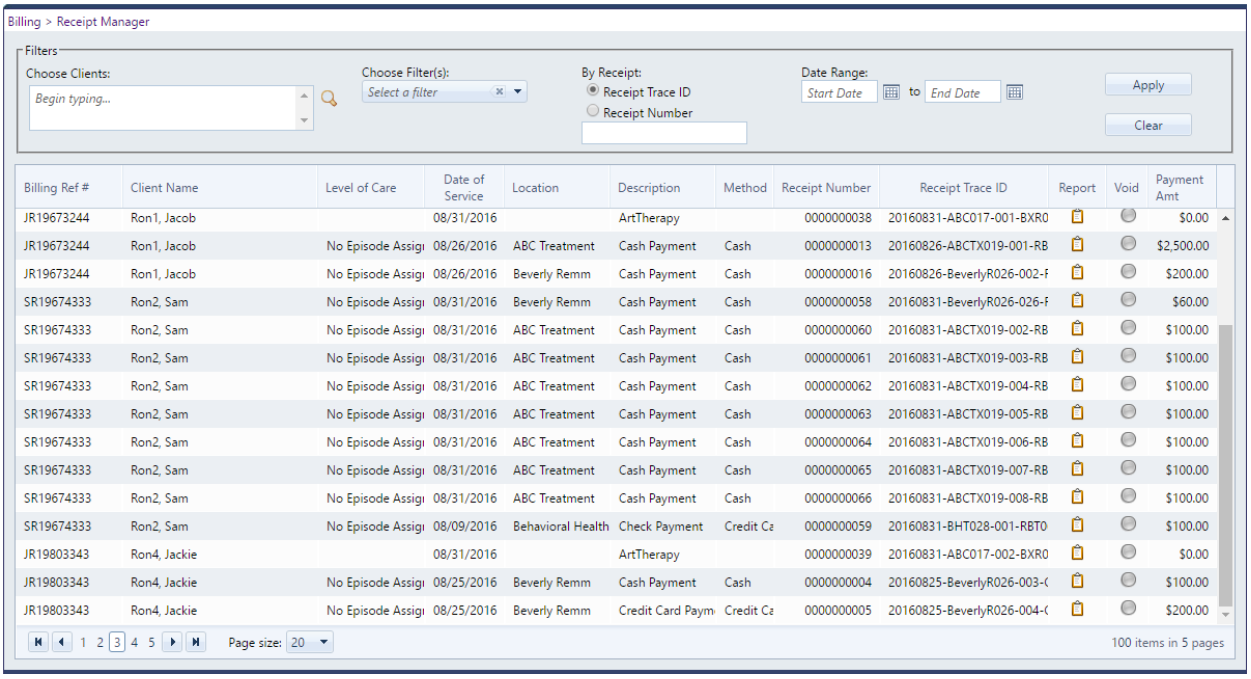
Apply Filters | Clear Filters

Edit	Client Info	Client	Payer Plan	Type	Service	Method	Units	Amount	Date of Service	Provider	Location	Place	Dx Code	Adn
		Abaca1, Teresa	TIP(TIP 368 Initiative)	Charge	ArtTherapy		5.500	$400.50	09/02/2016	Clinician, Paul	(ABCTX) ABC Treatment	11 - Off	F11.10	
		Abaca1, Teresa	TIP(TIP 368 Initiative)	Charge	Individual Therap		1.000	$100.00	09/02/2016	Billingclinician, Paul	(ABCT) ABC Treatment	11 - Off	F11.10	
		Abaca1, Teresa	TIP(TIP 368 Initiative)	Charge	Individual Therap		1.000	$100.00	09/02/2016	Clinician, Paul	(ABCTX) ABC Treatment	11 - Off		
		Abaca1, Teresa		Customer Payme	Co-pay (cash)	Cash	1.000	$0.00	08/29/2016	Clinician, Paul	(ABCTX) ABC Treatment			paid
		Abaca1, Teresa		Customer Payme	Customer Payme	Check	1.000	$0.00	08/29/2016	Clinician, Paul	(ABCTX) ABC Treatment			paid
		Abaca1, Teresa	TIP(TIP 368 Initiative)	Charge	ArtTherapy		1.000	$55.00	08/26/2016	Billingclinician, Paul	(ABCTX) ABC Treatment	11 - Off	F10.151	
		Abaca2, John	Aetna14079-08/01/2	Charge	Assessment		1.000	$150.00	08/26/2016	Billingclinician, Paul	(ABCT) ABC Treatment	11 - Off	F10.151	
		Abaca2, John	Aetna14079-08/01/2	Charge	Individual Therap		1.000	$100.00	08/26/2016	Billingclinician, Paul	(ABCT) ABC Treatment	11 - Off	Y07.521	
		Abbott, Alexander	Magellan-01/01/201	Charge	Group Therapy		1.000	$155.00	08/02/2016	Remm, Beverly	(BeverlyR) Beverly Remm	11 - Off	F10.129	
		Abbott, Alexander		Apply To Custom	90834		4.527	$113.17	08/01/2016	Remm, Beverly	(BeverlyR) Beverly Remm	11 - Off	F10.129	
		Abbott, Alexander	Magellan-01/01/201	Charge	90834		4.527	$113.17	08/01/2016	Remm, Beverly	(BeverlyR) Beverly Remm	11 - Off	F10.129	
		Abbott, Alexander	Magellan-01/01/201	Charge	Group Therapy		1.000	$155.00	07/31/2016	Remm, Beverly	(BeverlyR) Beverly Remm	11 - Off	F10.129	
		Abbott, Alexander		Charge	Group Therapy		1.000	$155.00	06/09/2016	SHELTON, JOHNETTA	(JML) Jennifer Lenagh PC	11 - Off	F10.129	
		Abbott, Alexander		Apply To Custom	Individual Therap		1.000	$100.00	06/07/2016	SHELTON, JOHNETTA	(JML) Jennifer Lenagh PC	11 - Off	F10.129	

1 2 Page size: 1000 1322 items in 2 pages

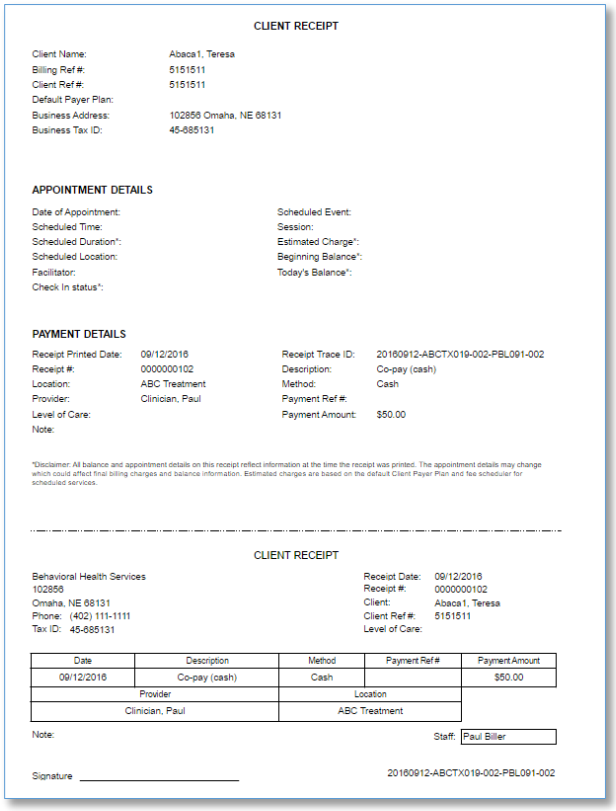
New | Export List | Close

7. Accessible from the main Billing menu, the **Receipt Manager** allows users to manage receipts that have been generated from a payment that was entered through AccuCare. Users can filter and search for a receipt that was saved or previously printed and reprint if needed. Receipts cannot be edited or deleted, because once they are entered, they are a transaction. However, users have the ability to Void a receipt, to maintain the integrity of the transaction. (When a receipt has been voided, the payment amount is changed to $0.00)



Billing Ref #	Client Name	Level of Care	Date of Service	Location	Description	Method	Receipt Number	Receipt Trace ID	Report	Void	Payment Amt
JR19673244	Ron1, Jacob		08/31/2016		ArtTherapy		0000000038	20160831-ABC017-001-BXR0			$0.00
JR19673244	Ron1, Jacob	No Episode Assigi	08/26/2016	ABC Treatment	Cash Payment	Cash	0000000013	20160826-ABCTX019-001-RB			$2,500.00
JR19673244	Ron1, Jacob	No Episode Assigi	08/26/2016	Beverly Remm	Cash Payment	Cash	0000000016	20160826-BeverlyR026-002-F			$200.00
SR19674333	Ron2, Sam	No Episode Assigi	08/31/2016	Beverly Remm	Cash Payment	Cash	0000000058	20160831-BeverlyR026-026-F			$60.00
SR19674333	Ron2, Sam	No Episode Assigi	08/31/2016	ABC Treatment	Cash Payment	Cash	0000000060	20160831-ABCTX019-002-RB			$100.00
SR19674333	Ron2, Sam	No Episode Assigi	08/31/2016	ABC Treatment	Cash Payment	Cash	0000000061	20160831-ABCTX019-003-RB			$100.00
SR19674333	Ron2, Sam	No Episode Assigi	08/31/2016	ABC Treatment	Cash Payment	Cash	0000000062	20160831-ABCTX019-004-RB			$100.00
SR19674333	Ron2, Sam	No Episode Assigi	08/31/2016	ABC Treatment	Cash Payment	Cash	0000000063	20160831-ABCTX019-005-RB			$100.00
SR19674333	Ron2, Sam	No Episode Assigi	08/31/2016	ABC Treatment	Cash Payment	Cash	0000000064	20160831-ABCTX019-006-RB			$100.00
SR19674333	Ron2, Sam	No Episode Assigi	08/31/2016	ABC Treatment	Cash Payment	Cash	0000000065	20160831-ABCTX019-007-RB			$100.00
SR19674333	Ron2, Sam	No Episode Assigi	08/31/2016	ABC Treatment	Cash Payment	Cash	0000000066	20160831-ABCTX019-008-RB			$100.00
SR19674333	Ron2, Sam	No Episode Assigi	08/09/2016	Behavioral Health	Check Payment	Credit Ca	0000000059	20160831-BHT028-001-RBT0			$100.00
JR19803343	Ron4, Jackie		08/31/2016		ArtTherapy		0000000039	20160831-ABC017-002-BXR0			$0.00
JR19803343	Ron4, Jackie	No Episode Assigi	08/25/2016	Beverly Remm	Cash Payment	Cash	0000000004	20160825-BeverlyR026-003-(			$100.00
JR19803343	Ron4, Jackie	No Episode Assigi	08/25/2016	Beverly Remm	Credit Card Paym	Credit Ca	0000000005	20160825-BeverlyR026-004-(			$200.00

8. **Receipts** can be generated in Client Billing Activity, Service Processing, and the Client Payment Entry in Scheduler. All Receipts have a unique Receipt Number and unique Receipt Trace ID. In addition, the user has options to print single or duplicate receipts (if using carbonless paper).



CLIENT RECEIPT

Client Name: Abaca1, Teresa
Billing Ref #: 5151511
Client Ref #: 5151511
Default Payer Plan:
Business Address: 102856 Omaha, NE 68131
Business Tax ID: 45-685131

APPOINTMENT DETAILS

Date of Appointment:
Scheduled Time:
Scheduled Duration*:
Scheduled Location:
Facilitator:
Check In status*:
Scheduled Event:
Session:
Estimated Charge*:
Beginning Balance*:
Today's Balance*:

PAYMENT DETAILS

Receipt Printed Date: 09/12/2016
Receipt #: 0000000102
Location: ABC Treatment
Provider: Clinician, Paul
Level of Care:
Note:
Receipt Trace ID: 20160912-ABCTX019-002-PBL091-002
Description: Co-pay (cash)
Method: Cash
Payment Ref #:
Payment Amount: $50.00

*Disclaimer: All balance and appointment details on this receipt reflect information at the time the receipt was printed. The appointment details may change which could affect final billing charges and balance information. Estimated charges are based on the default Client Payer Plan and fee scheduler for scheduled services.

CLIENT RECEIPT

Behavioral Health Services
102856
Omaha, NE 68131
Phone: (402) 111-1111
Tax ID: 45-685131

Receipt Date: 09/12/2016
Receipt #: 0000000102
Client: Abaca1, Teresa
Client Ref #: 5151511
Level of Care:

Date	Description	Method	Payment Ref #	Payment Amount
09/12/2016	Co-pay (cash)	Cash		$50.00
Provider		Location		
Clinician, Paul		ABC Treatment		

Note:
Staff: Paul Biller

Signature _____

20160912-ABCTX019-002-PBL091-002

9. The **Submit Services** module is replacing the former Prepare Claims and Submit Claims areas. The user has the ability to filter by additional selections to display all services.

Submit Services

Filter

Choose Clients: Begin typing...

Choose Filter(s): Select a filter

Date: Date of Service — All Dates — Date Range Enter a Start Date to Enter an End Date

Apply Filters | Clear Filters | Display All Ready

Services List

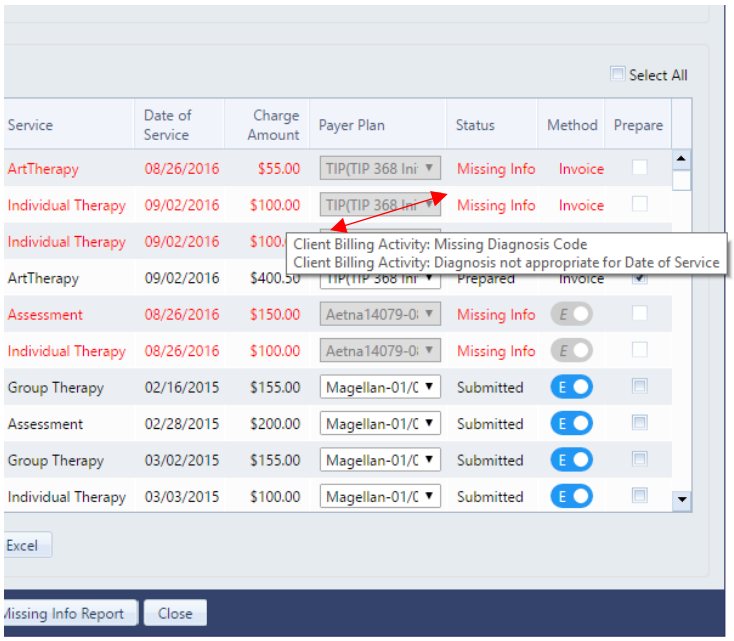
Select All

Client Info	Client Name	Bill As Provider	Location	Plc	Units	Dx Code	Auth #	Amount Paid	Amount Remaining	Service	Date of Service	Charge Amount	Payer Plan	Status	Method	Prepare
	Abaca1, Teresa	Billingclinician, Paul	ABCTX	11	1.000	F10.151		$0.00	$55.00	ArtTherapy	08/26/2016	$55.00	TIP(TIP 368 Ini	Missing Info	Invoice	
	Abaca1, Teresa	Clinician, Paul	ABCTX	11	1.000			$0.00	$100.00	Individual Therapy	09/02/2016	$100.00	TIP(TIP 368 Ini	Missing Info	Invoice	
	Abaca1, Teresa	Billingclinician, Paul	ABCT	11	1.000	F11.10		$0.00	$100.00	Individual Therapy	09/02/2016	$100.00	TIP(TIP 368 Ini	Missing Info	Invoice	
	Abaca1, Teresa	Clinician, Paul	ABCTX	11	5.500	F11.10		$0.00	$400.50	ArtTherapy	09/02/2016	$400.50	TIP(TIP 368 Ini	Prepared	Invoice	✓
	Abaca2, John	Billingclinician, Paul	ABCT	11	1.000	F10.151		$0.00	$150.00	Assessment	08/26/2016	$150.00	Aetna14079-0	Missing Info	E	
	Abaca2, John	Billingclinician, Paul	ABCT	11	1.000	Y07.521		$0.00	$100.00	Individual Therapy	08/26/2016	$100.00	Aetna14079-0	Missing Info	E	
	Abbott, Alexander	Remm, Beverly	BeverlyR	11	1.000	309.0		$0.00	$155.00	Group Therapy	02/16/2015	$155.00	Magellan-01/C	Submitted	E	
	Abbott, Alexander	Remm, Beverly	BeverlyR	11	1.000	309.0		$0.00	$200.00	Assessment	02/28/2015	$200.00	Magellan-01/C	Submitted	E	
	Abbott, Alexander	Remm, Beverly	BeverlyR	11	1.000	309.0		$0.00	$155.00	Group Therapy	03/02/2015	$155.00	Magellan-01/C	Submitted	E	
	Abbott, Alexander	Remm, Beverly	BeverlyR	11	1.000	309.0		$0.00	$100.00	Individual Therapy	03/03/2015	$100.00	Magellan-01/C	Submitted	E	

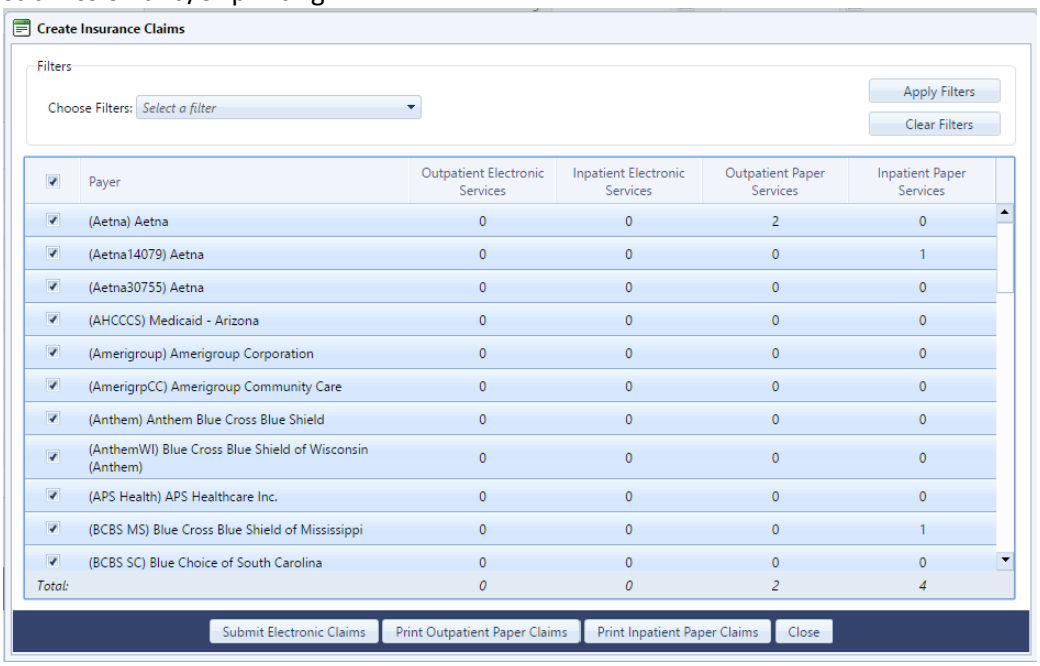
Prepare | Export List to Excel

Create Insurance Claims | Create Invoices | Missing Info Report | Close

A tool tip displays the Missing Information reason when the row is hovered as well as having quick access to the Missing Information Report

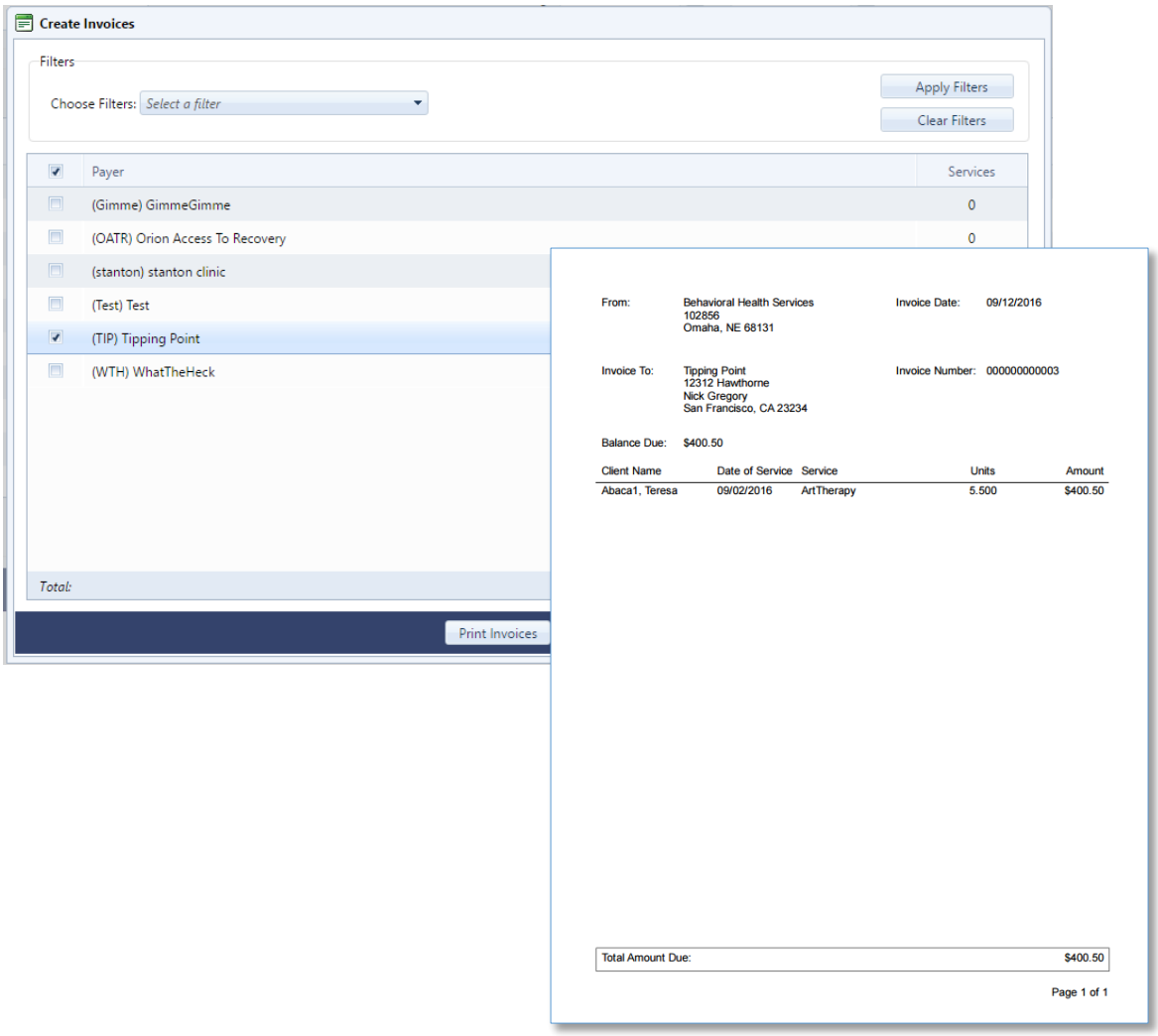


The layout of the **Create Insurance Claims** screen has been modified for easier review and claim submission and/or printing.



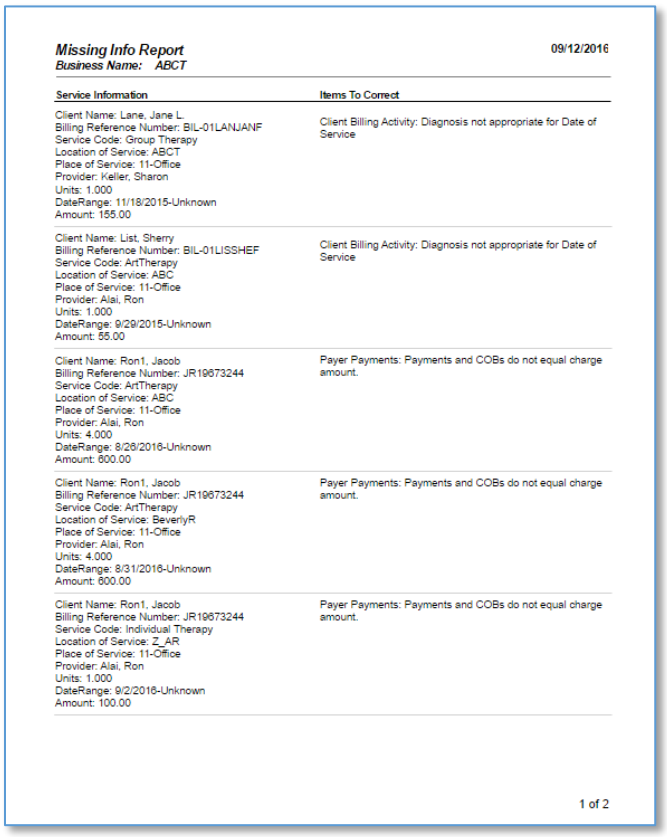
Payer	Outpatient Electronic Services	Inpatient Electronic Services	Outpatient Paper Services	Inpatient Paper Services
(Aetna) Aetna	0	0	2	0
(Aetna14079) Aetna	0	0	0	1
(Aetna30755) Aetna	0	0	0	0
(AHCCCS) Medicaid - Arizona	0	0	0	0
(Amerigroup) Amerigroup Corporation	0	0	0	0
(AmerigrpCC) Amerigroup Community Care	0	0	0	0
(Anthem) Anthem Blue Cross Blue Shield	0	0	0	0
(AnthemWI) Blue Cross Blue Shield of Wisconsin (Anthem)	0	0	0	0
(APS Health) APS Healthcare Inc.	0	0	0	0
(BCBS MS) Blue Cross Blue Shield of Mississippi	0	0	0	1
(BCBS SC) Blue Choice of South Carolina	0	0	0	0
Total:	*0*	*0*	*2*	*4*

Users can create **Invoice Reports** to be sent to non-insurance payers.



Payer	Services
(Gimme) GimmeGimme	0
(OATR) Orion Access To Recovery	0
(stanton) stanton clinic	
(Test) Test	
(TIP) Tipping Point	
(WTH) WhatTheHeck	
Total:	

10. Missing Information Report - design changes



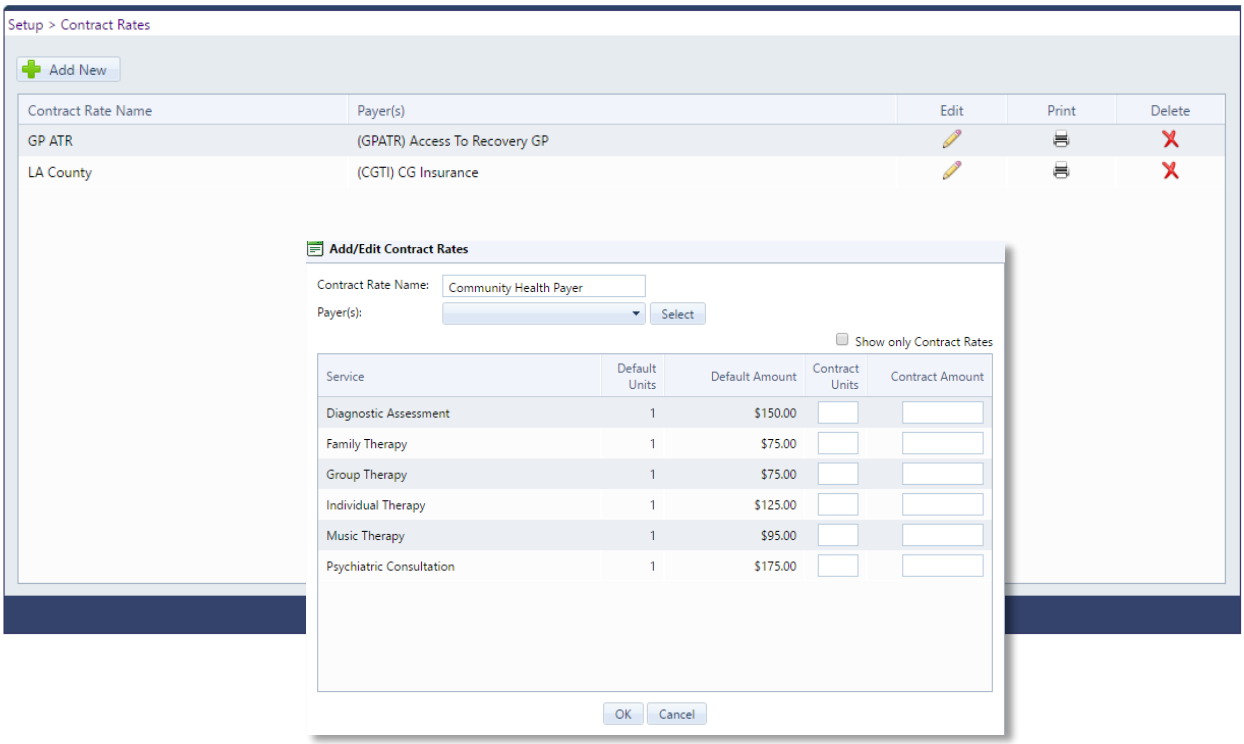
Missing Info Report
Business Name: ABCT

09/12/2016

Service Information	Items To Correct
Client Name: Lane, Jane L. Billing Reference Number: BIL-01LANJANF Service Code: Group Therapy Location of Service: ABCT Place of Service: 11-Office Provider: Keller, Sharon Units: 1.000 DateRange: 11/18/2015-Unknown Amount: 155.00	Client Billing Activity: Diagnosis not appropriate for Date of Service
Client Name: List, Sherry Billing Reference Number: BIL-01LISSHEF Service Code: ArtTherapy Location of Service: ABC Place of Service: 11-Office Provider: Alai, Ron Units: 1.000 DateRange: 9/29/2015-Unknown Amount: 85.00	Client Billing Activity: Diagnosis not appropriate for Date of Service
Client Name: Ron1, Jacob Billing Reference Number: JR19673244 Service Code: ArtTherapy Location of Service: ABC Place of Service: 11-Office Provider: Alai, Ron Units: 4.000 DateRange: 8/26/2016-Unknown Amount: 600.00	Payer Payments: Payments and COBs do not equal charge amount.
Client Name: Ron1, Jacob Billing Reference Number: JR19673244 Service Code: ArtTherapy Location of Service: BeverlyR Place of Service: 11-Office Provider: Alai, Ron Units: 4.000 DateRange: 8/31/2016-Unknown Amount: 600.00	Payer Payments: Payments and COBs do not equal charge amount.
Client Name: Ron1, Jacob Billing Reference Number: JR19673244 Service Code: Individual Therapy Location of Service: Z_AR Place of Service: 11-Office Provider: Alai, Ron Units: 1.000 DateRange: 9/2/2016-Unknown Amount: 100.00	Payer Payments: Payments and COBs do not equal charge amount.

1 of 2

11. A new Contract Rates feature allows agencies to override units and amounts for an invoice or insurance company payer.



Setup > Contract Rates

Add New

Contract Rate Name	Payer(s)	Edit	Print	Delete
GP ATR	(GPATR) Access To Recovery GP			
LA County	(CGTI) CG Insurance			

Add/Edit Contract Rates

Contract Rate Name: Community Health Payer

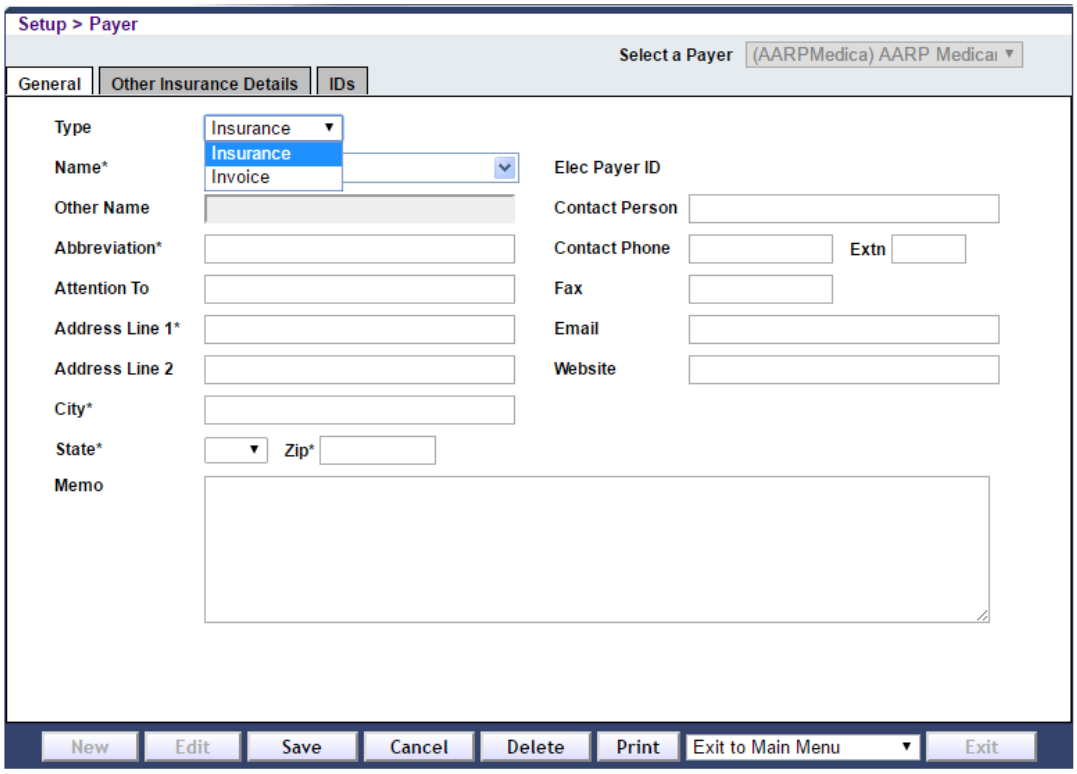
Payer(s): Select

Show only Contract Rates

Service	Default Units	Default Amount	Contract Units	Contract Amount
Diagnostic Assessment	1	$150.00		
Family Therapy	1	$75.00		
Group Therapy	1	$75.00		
Individual Therapy	1	$125.00		
Music Therapy	1	$95.00		
Psychiatric Consultation	1	$175.00		

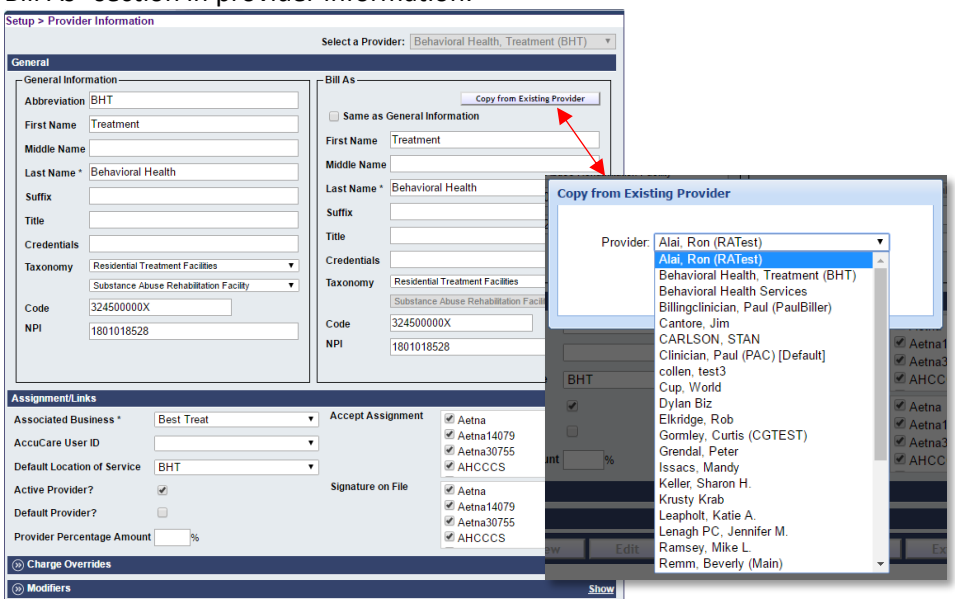
OK Cancel

12. Now users can **setup Payer** Information for payers that are **non-insurance** (setting them up as Invoice type rather than insurance. Because of this additional Payer setup, we have also renamed some of the screens and labels that were marked as “Insurance” to “Payer” to better reflect the payer type throughout many areas in Billing.



13. **Payment Method Type** was removed from the Services setup and added to the transaction level. So now when entering payments, the Payment Method Type is recorded and tracked.

14. In **Provider Setup**, users have the ability to copy information from an existing provider when editing the “Bill As” section in provider information.



15. In **ERA processing**, the post button is disabled when there are no items in the grid.