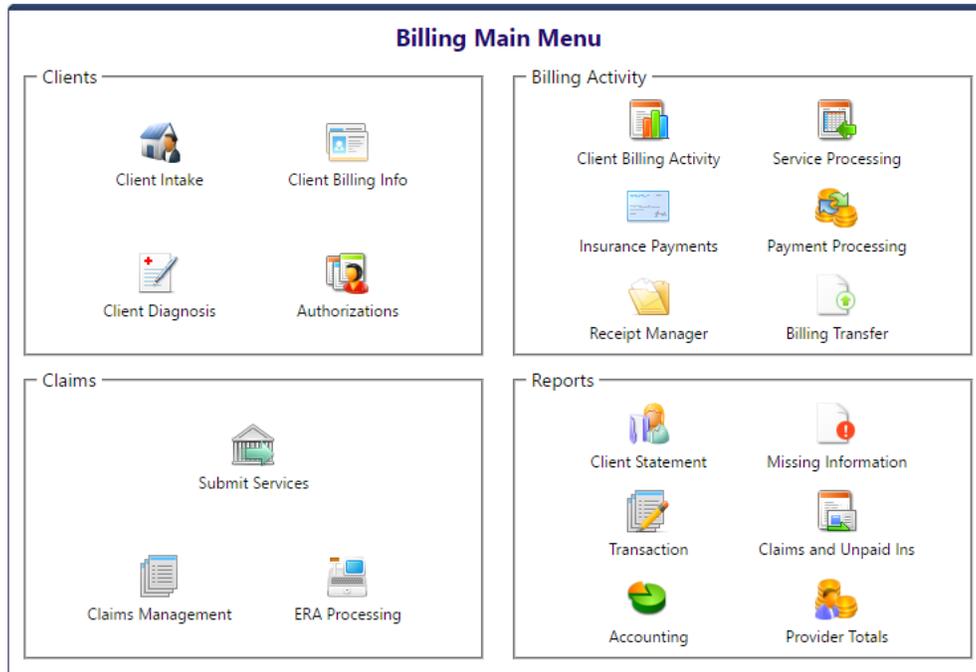


AccuCare 9.8J Release Notes – Billing Enhancements

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.

Billing > Service Processing

Transaction Data

Client

Client Payer Plan

Provider: Clinician, Paul (PAC)

Transaction Type

Service Code

Pmt Method

Pmt Reference #

Units

Amount

Date Of Service: 09/12/2016

End Date Of Service

Location: ABCTX

Place Of Service: 11 - Office

Frequency: 1 - Admit thru Discharge

Diagnosis Code

Admin Note

Use Ins.: Yes

Claim Note

Pmt Receipt Number

Print Receipt

Clear Apply

Transaction List

Client Name	Service Date	Service Code	Amount	Remove All
-------------	--------------	--------------	--------	------------

Total Charges: \$0.00 Total Adjustments: \$0.00 Total Payments: \$0.00

Post Clear

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

Client Payment Entry

Client: Begin typing (ex: Doe, John)

Client Current Balance:

Level of Care:

Payment Type: Select a Payment Type

Payment Method:

Amount:

Date Of Payment: 09/12/2016

Payment Reference #:

Provider: Clinician, Paul (PAC)

Location Of Service: ABCTX

Admin Note:

Receipt Number:

Print Client Receipt

Save Save and Next Cancel

- 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.

Client Billing Information Select a Client: Abaca1, Teresa

General Payers Fee Schedule Billing Comments

Edit

Statement Information:
 Statement Name: Teresa Abaca1
 Address: 123 Any Street 18047 Oak Street
 Omaha, NE 68130
 Phone: 402-151-5151
 Statement Comment: this is where the statement comment is entered for CBI>Statement Information. i'm checking how much I can type in here and what it does to the word wrapping on the main CBI screen>General tab. this is where the statement comment is entered for CBI>Staterne
 Hold Statement: No
 Self Pay: No

Reference Numbers:
 Client Reference #: 5151511
 Billing Reference #: 5151511

Client Consent:
 Release of Info on File: Yes
 Release of Info Date:
 Client given Informed Consent: Yes
 Assign Payment to Agency: Yes

Referring Physician:
 Name:
 NPI #:

Client's Condition:
 Condition Related To: Employment
 Date of Current Illness: 08/04/2016
 First Date of Illness: 08/25/2016

Print Close

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.

Billing Information

Client Reference #: 5151511
 Billing Reference #: 5151511

Client Consent

Release of Info on File
 Release of Info Date: Enter Date

Client Given Informed Consent

Assign Payment to Agency

Referring Provider

First Name: Middle Initial:
 Last Name: Suffix:
 NPI #:

Client's Condition

Condition Related To: Employment
 Other Accident
 Auto Accident Location (State):

Date of Current Illness: 08/04/2016
 First Date of Illness: 08/25/2016
 Dates Unable to Work: 08/26/2016 to 08/31/2016
 Dates Hospitalized: 08/17/2016 to 08/26/2016

Statement Information

Get Info from Client Intake

First Name: Teresa Last Name: Abaca1
 Address 1: 123 Any Street
 Address 2: 18047 Oak Street
 City: Omaha
 State: NE Zip: 68130-
 Phone: (402) 151-5151 x Home

Statement Comment: this is where the statement comment is entered for CBI>Statement Inf

Hold Client Statement
 Self Pay

Save Cancel

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

Client Billing Information Select a Client: Abaca1, Teresa

General **Payers** Fee Schedule Billing Comments

[Add New Payer Plan](#)

Automation Order	Default	Payer Type	Payer Name	Plan Name	Plan Type	Effective Date	End Date	ID Number	Hold	Edit	Delete
1	✓	Invoice	Orion Access To Recovery	Orion ATR	Other	08/01/2016	08/31/2016				
2		Invoice	Tipping Point	TIP 368 Initiative	Other	08/01/2016	08/31/2016				

Print Close

Payer Plan Details

Payer Type*: Insurance
Payer Name*: Invoice
Plan Name:
Effective Date*: Enter Date
End Date: Enter Date
Plan Type*:
Insured's ID*:
Group #:
Group Name:
Relationship to Insured*:
 Set as Default Plan
 Hold
Automation Order:
Plan Notes:

Insured's Information [Get Info from Client Intake](#)

First Name*:
Middle Name:
Last Name*:
Suffix:
Address 1*:
Address 2:
City*:
State*:
Zip*:
Gender*:
Date of Birth*: Enter Date
Employer/School:
Phone 1: () - - x
Phone 2: () - - x

Save Cancel

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

Client Billing Information Select a Client: Abaca1, Teresa

General Payers **Fee Schedule** Billing Comments

Edit

Service	Default Units	Default Amount	Fee Schedule Units	Fee Schedule Amount
90849-1	1,000	\$85.00	1,000	\$75.00

Print Close

Fee Schedule Show only Services with a Fee Schedule

Service	Default Units	Default Amount	Fee Schedule Units	Fee Schedule Amount
90834	4,000	\$25.00	<input type="text"/>	\$ <input type="text"/>
90849-1	1,000	\$85.00	<input type="text" value="1"/>	\$ <input type="text" value="75.00"/>
96101-B	2,000	\$300.00	<input type="text"/>	\$ <input type="text"/>
AH0031-AJ	1,000	\$150.00	<input type="text"/>	\$ <input type="text"/>
ArtTherapy	1,000	\$55.00	<input type="text"/>	\$ <input type="text"/>
Assessment	1,000	\$200.00	<input type="text"/>	\$ <input type="text"/>
Balance Forward	1,000	\$0.00	<input type="text"/>	\$ <input type="text"/>

Save Cancel

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

Client Billing Information Select a Client: Abaca1, Teresa

General Payers Fee Schedule **Billing Comments**

Edit

Billing comments entered here.

Comments

Billing comments entered here.

Save Cancel

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

Billing > Billing Transfer

Filters

Choose Clients: Choose Filter(s): Date of Service: All Dates Date Range to

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-C	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: Choose Filter(s): Select By: All Dates Date Range to

Show Columns:

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 Paymei	Co-pay (cash)	Cash	1.000	\$0.00	08/29/2016	Clinician, Paul	(ABCTX) ABC Treatment			paid
		Abaca1, Teresa		Customer Paymei	Customer Paymei	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	

Page size: 1000

1322 items in 2 pages

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 > Receipt Manager

Filters

Choose Clients: Choose Filter(s): By Receipt: Receipt Trace ID Receipt Number Date Range: to

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		000000038	20160831-ABC017-001-BXR0	<input type="button" value="Print"/>	<input type="radio"/>	\$0.00
JR19673244	Ron1, Jacob	No Episode Assigi	08/26/2016	ABC Treatment	Cash Payment	Cash	000000013	20160826-ABCTX019-001-RB	<input type="button" value="Print"/>	<input type="radio"/>	\$2,500.00
JR19673244	Ron1, Jacob	No Episode Assigi	08/26/2016	Beverly Remm	Cash Payment	Cash	000000016	20160826-BeverlyR026-002-f	<input type="button" value="Print"/>	<input type="radio"/>	\$200.00
SR19674333	Ron2, Sam	No Episode Assigi	08/31/2016	Beverly Remm	Cash Payment	Cash	000000058	20160831-BeverlyR026-026-f	<input type="button" value="Print"/>	<input type="radio"/>	\$60.00
SR19674333	Ron2, Sam	No Episode Assigi	08/31/2016	ABC Treatment	Cash Payment	Cash	000000060	20160831-ABCTX019-002-RB	<input type="button" value="Print"/>	<input type="radio"/>	\$100.00
SR19674333	Ron2, Sam	No Episode Assigi	08/31/2016	ABC Treatment	Cash Payment	Cash	000000061	20160831-ABCTX019-003-RB	<input type="button" value="Print"/>	<input type="radio"/>	\$100.00
SR19674333	Ron2, Sam	No Episode Assigi	08/31/2016	ABC Treatment	Cash Payment	Cash	000000062	20160831-ABCTX019-004-RB	<input type="button" value="Print"/>	<input type="radio"/>	\$100.00
SR19674333	Ron2, Sam	No Episode Assigi	08/31/2016	ABC Treatment	Cash Payment	Cash	000000063	20160831-ABCTX019-005-RB	<input type="button" value="Print"/>	<input type="radio"/>	\$100.00
SR19674333	Ron2, Sam	No Episode Assigi	08/31/2016	ABC Treatment	Cash Payment	Cash	000000064	20160831-ABCTX019-006-RB	<input type="button" value="Print"/>	<input type="radio"/>	\$100.00
SR19674333	Ron2, Sam	No Episode Assigi	08/31/2016	ABC Treatment	Cash Payment	Cash	000000065	20160831-ABCTX019-007-RB	<input type="button" value="Print"/>	<input type="radio"/>	\$100.00
SR19674333	Ron2, Sam	No Episode Assigi	08/31/2016	ABC Treatment	Cash Payment	Cash	000000066	20160831-ABCTX019-008-RB	<input type="button" value="Print"/>	<input type="radio"/>	\$100.00
SR19674333	Ron2, Sam	No Episode Assigi	08/09/2016	Behavioral Health	Check Payment	Credit Cz	000000059	20160831-BHT028-001-RBTO	<input type="button" value="Print"/>	<input type="radio"/>	\$100.00
JR19803343	Ron4, Jackie		08/31/2016		ArtTherapy		000000039	20160831-ABC017-002-BXR0	<input type="button" value="Print"/>	<input type="radio"/>	\$0.00
JR19803343	Ron4, Jackie	No Episode Assigi	08/25/2016	Beverly Remm	Cash Payment	Cash	000000004	20160825-BeverlyR026-003-(<input type="button" value="Print"/>	<input type="radio"/>	\$100.00
JR19803343	Ron4, Jackie	No Episode Assigi	08/25/2016	Beverly Remm	Credit Card Paym	Credit Cz	000000005	20160825-BeverlyR026-004-(<input type="button" value="Print"/>	<input type="radio"/>	\$200.00

Page size: 20 100 items in 5 pages

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: 102858 Omaha, NE 68131
Business Tax ID: 45-885131

APPOINTMENT DETAILS

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

PAYMENT DETAILS

Receipt Printed Date: 09/12/2016 Receipt Trace ID: 20160912-ABCTX019-002-PBL091-002
Receipt #: 000000102 Description: Co-pay (cash)
Location: ABC Treatment Method: Cash
Provider: Clinician, Paul Payment Ref #:
Level of Care: Payment Amount: \$50.00
Note:

*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 102858 Omaha, NE 68131 Phone: (402) 111-1111 Tax ID: 45-885131
Receipt Date: 09/12/2016 Receipt #: 000000102 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 Biler

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.

The screenshot shows the 'Submit Services' interface. At the top, there is a 'Filter' section with a 'Choose Clients' dropdown, a 'Choose Filter(s)' dropdown, and a 'Date' dropdown set to 'Date of Service'. Below these are radio buttons for 'All Dates' and 'Date Range' with input fields for start and end dates. There are buttons for 'Apply Filters', 'Clear Filters', and 'Display All Ready'. Below the filter section is the 'Services List' table. The table has columns for 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, and Prepare. The table contains several rows of service data. At the bottom of the table are buttons for 'Prepare' and 'Export List to Excel'. Below the table are buttons for 'Create Insurance Claims', 'Create Invoices', 'Missing Info Report', and 'Close'.

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	<input type="checkbox"/>
	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	<input type="checkbox"/>
	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	<input type="checkbox"/>
	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	<input checked="" type="checkbox"/>
	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	<input type="checkbox"/>
	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	<input type="checkbox"/>
	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	<input type="checkbox"/>
	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	<input type="checkbox"/>
	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	<input type="checkbox"/>
	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	<input type="checkbox"/>

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

This close-up screenshot shows a portion of the services list table. A tooltip is displayed over the 'Missing Info' status of a row. The tooltip contains the following text: 'Client Billing Activity: Missing Diagnosis Code' and 'Client Billing Activity: Diagnosis not appropriate for Date of Service'. Below the tooltip is an 'Excel' button. At the bottom of the screenshot are buttons for 'Missing Info Report' and 'Close'.

Service	Date of Service	Charge Amount	Payer Plan	Status	Method	Prepare
ArtTherapy	08/26/2016	\$55.00	TIP(TIP 368 Ini	Missing Info	Invoice	<input type="checkbox"/>
Individual Therapy	09/02/2016	\$100.00	TIP(TIP 368 Ini	Missing Info	Invoice	<input type="checkbox"/>
Individual Therapy	09/02/2016	\$100.00	TIP(TIP 368 Ini	Missing Info	Invoice	<input type="checkbox"/>
ArtTherapy	09/02/2016	\$400.50	TIP(TIP 368 Ini	Prepared	Invoice	<input checked="" type="checkbox"/>
Assessment	08/26/2016	\$150.00	Aetna14079-0	Missing Info	E	<input type="checkbox"/>
Individual Therapy	08/26/2016	\$100.00	Aetna14079-0	Missing Info	E	<input type="checkbox"/>
Group Therapy	02/16/2015	\$155.00	Magellan-01/C	Submitted	E	<input type="checkbox"/>
Assessment	02/28/2015	\$200.00	Magellan-01/C	Submitted	E	<input type="checkbox"/>
Group Therapy	03/02/2015	\$155.00	Magellan-01/C	Submitted	E	<input type="checkbox"/>
Individual Therapy	03/03/2015	\$100.00	Magellan-01/C	Submitted	E	<input type="checkbox"/>

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

Create Insurance Claims

Filters
 Choose Filters:

<input checked="" type="checkbox"/>	Payer	Outpatient Electronic Services	Inpatient Electronic Services	Outpatient Paper Services	Inpatient Paper Services
<input checked="" type="checkbox"/>	(Aetna) Aetna	0	0	2	0
<input checked="" type="checkbox"/>	(Aetna14079) Aetna	0	0	0	1
<input checked="" type="checkbox"/>	(Aetna30755) Aetna	0	0	0	0
<input checked="" type="checkbox"/>	(AHCCCS) Medicaid - Arizona	0	0	0	0
<input checked="" type="checkbox"/>	(Amerigroup) Amerigroup Corporation	0	0	0	0
<input checked="" type="checkbox"/>	(AmerigrpCC) Amerigroup Community Care	0	0	0	0
<input checked="" type="checkbox"/>	(Anthem) Anthem Blue Cross Blue Shield	0	0	0	0
<input checked="" type="checkbox"/>	(AnthemWI) Blue Cross Blue Shield of Wisconsin (Anthem)	0	0	0	0
<input checked="" type="checkbox"/>	(APS Health) APS Healthcare Inc.	0	0	0	0
<input checked="" type="checkbox"/>	(BCBS MS) Blue Cross Blue Shield of Mississippi	0	0	0	1
<input checked="" type="checkbox"/>	(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.

Create Invoices

Filters
 Choose Filters:

<input checked="" type="checkbox"/>	Payer	Services
<input type="checkbox"/>	(Gimme) GimmeGimme	0
<input type="checkbox"/>	(OATR) Orion Access To Recovery	0
<input type="checkbox"/>	(stanton) stanton clinic	
<input type="checkbox"/>	(Test) Test	
<input checked="" type="checkbox"/>	(TIP) Tipping Point	
<input type="checkbox"/>	(WTH) WhatTheHeck	
Total:		

From: Behavioral Health Services
102856
Omaha, NE 68131

Invoice Date: 09/12/2016

Invoice To: Tipping Point
12312 Hawthorne
Nick Gregory
San Francisco, CA 23234

Invoice Number: 00000000003

Balance Due: \$400.50

Client Name	Date of Service	Service	Units	Amount
Abaca1, Teresa	09/02/2016	ArtTherapy	5.500	\$400.50

Total Amount Due: \$400.50

Page 1 of 1

10. Missing Information Report - design changes

Missing Info Report		09/12/2016
Business Name: ABCT		
Service Information	Items To Correct	
Client Name: Lane, Jane L. Billing Reference Number: BIL-01LANJANF Service Code: Group Therapy Location of Service: ABC 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: 55.00	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: 8/28/2016-Unknown Amount: 800.00	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: 800.00	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:

Payer(s):

Show only Contract Rates

Service	Default Units	Default Amount	Contract Units	Contract Amount
Diagnostic Assessment	1	\$150.00	<input type="text"/>	<input type="text"/>
Family Therapy	1	\$75.00	<input type="text"/>	<input type="text"/>
Group Therapy	1	\$75.00	<input type="text"/>	<input type="text"/>
Individual Therapy	1	\$125.00	<input type="text"/>	<input type="text"/>
Music Therapy	1	\$95.00	<input type="text"/>	<input type="text"/>
Psychiatric Consultation	1	\$175.00	<input type="text"/>	<input type="text"/>

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.