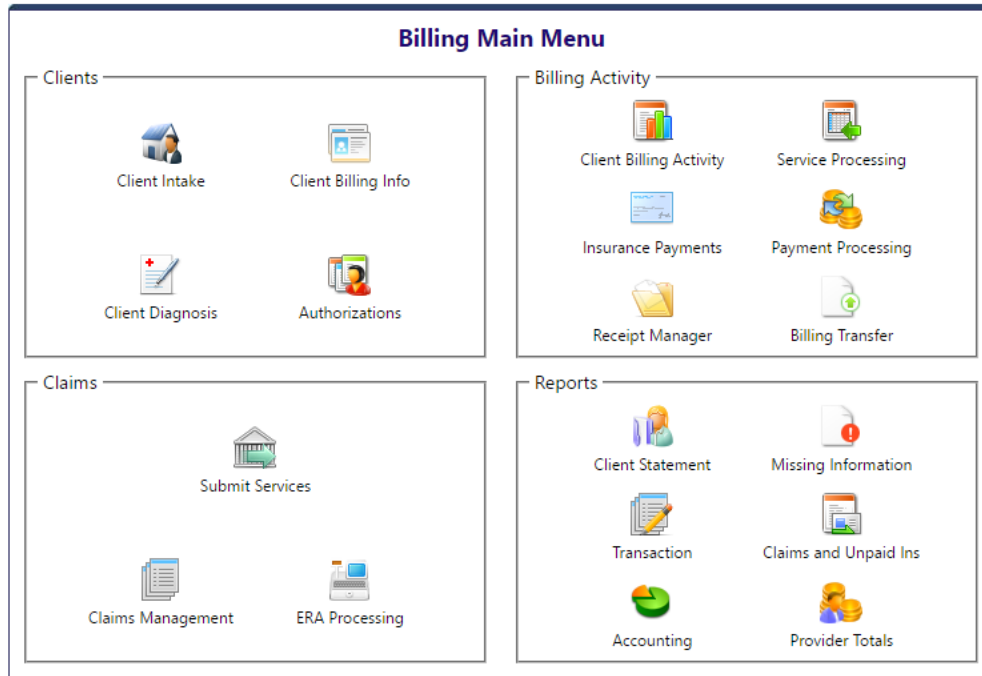


AccuCare 9.8J Release Notes – Billing Enhancements

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: [Searchable Field]
Client Payer Plan: [Dropdown]
Provider: Clinician, Paul (PAC) [Dropdown]
Transaction Type: [Dropdown]
Service Code: [Dropdown]
Pmt Method: [Dropdown]
Pmt Reference #: [Text Field]
Units: [Text Field]
Amount: [Text Field]
Date Of Service: 09/12/2016 [Calendar Icon]
End Date Of Service: [Calendar Icon]
Location: ABCTX [Dropdown]
Place Of Service: 11 - Office [Dropdown]
Frequency: 1 - Admit thru Discharge [Dropdown]
Diagnosis Code: [Dropdown]
Admin Note: [Text Field]
Use Ins.: Yes [Dropdown]
Claim Note: [Text Field]
Pmt Receipt Number: [Text Field]
Print Receipt: ☐

Transaction List

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

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

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:* [Searchable Field]
Client Current Balance: [Text Field]
Level of Care: [Dropdown]
Payment Type:* Select a Payment Type [Dropdown]
Payment Method: [Dropdown]
Amount:* [Text Field]
Date Of Payment:* 09/12/2016 [Calendar Icon]
Payment Reference #: [Text Field]
Provider:* Clinician, Paul (PAC) [Dropdown]
Location Of Service: ABCTX [Dropdown]
Admin Note: [Text Field]
Receipt Number: [Dropdown]
Print Client Receipt: ☐

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 screenshot shows the 'Client Billing Information' form with the 'General' tab selected. The form is titled 'Client Billing Information' and has a 'Select a Client' dropdown set to 'Abaca1, Teresa'. The form is divided into several sections: 'Statement Information', 'Reference Numbers', 'Client Consent', 'Referring Physician', and 'Client's Condition'. The 'Statement Information' section includes fields for Statement Name, Address, Phone, Statement Comment, Hold Statement, and Self Pay. The 'Reference Numbers' section includes Client Reference # and Billing Reference #. The 'Client Consent' section includes Release of Info on File, Release of Info Date, Client given Informed Consent, and Assign Payment to Agency. The 'Referring Physician' section includes Name and NPI #. The 'Client's Condition' section includes Condition Related To, Date of Current Illness, and First Date of Illness. There are 'Edit', 'Print', and 'Close' buttons at the bottom.

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>Stateme
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.

The screenshot shows the 'Billing Information' form. The 'Client Consent' section has checkboxes for 'Release of Info on File', 'Client Given Informed Consent', and 'Assign Payment to Agency'. The 'Client's Condition' section has checkboxes for 'Employment', 'Other Accident', and 'Auto Accident', along with date fields for 'Date of Current Illness', 'First Date of Illness', 'Dates Unable to Work', and 'Dates Hospitalized'. The 'Statement Information' section has fields for 'First Name', 'Last Name', 'Address 1', 'Address 2', 'City', 'State', 'Zip', 'Phone', and 'Statement Comment'. There are 'Save' and 'Cancel' buttons at the bottom.

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	Held	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:

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 Client(s):

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		0000000038	20160831-ABCO17-001-BXR0			\$0.00
JR19673244	Ron1, Jacob	No Episode Assig	08/26/2016	ABC Treatment	Cash Payment	Cash	0000000013	20160826-ABCTX019-001-RB			\$2,500.00
JR19673244	Ron1, Jacob	No Episode Assig	08/26/2016	Beverly Remm	Cash Payment	Cash	0000000016	20160826-BeverlyR026-002-f			\$200.00
SR19674333	Ron2, Sam	No Episode Assig	08/31/2016	Beverly Remm	Cash Payment	Cash	0000000058	20160831-BeverlyR026-026-f			\$60.00
SR19674333	Ron2, Sam	No Episode Assig	08/31/2016	ABC Treatment	Cash Payment	Cash	0000000060	20160831-ABCTX019-002-RB			\$100.00
SR19674333	Ron2, Sam	No Episode Assig	08/31/2016	ABC Treatment	Cash Payment	Cash	0000000061	20160831-ABCTX019-003-RB			\$100.00
SR19674333	Ron2, Sam	No Episode Assig	08/31/2016	ABC Treatment	Cash Payment	Cash	0000000062	20160831-ABCTX019-004-RB			\$100.00
SR19674333	Ron2, Sam	No Episode Assig	08/31/2016	ABC Treatment	Cash Payment	Cash	0000000063	20160831-ABCTX019-005-RB			\$100.00
SR19674333	Ron2, Sam	No Episode Assig	08/31/2016	ABC Treatment	Cash Payment	Cash	0000000064	20160831-ABCTX019-006-RB			\$100.00
SR19674333	Ron2, Sam	No Episode Assig	08/31/2016	ABC Treatment	Cash Payment	Cash	0000000065	20160831-ABCTX019-007-RB			\$100.00
SR19674333	Ron2, Sam	No Episode Assig	08/31/2016	ABC Treatment	Cash Payment	Cash	0000000066	20160831-ABCTX019-008-RB			\$100.00
SR19674333	Ron2, Sam	No Episode Assig	08/09/2016	Behavioral Health	Check Payment	Credit Cz	0000000059	20160831-BHT028-001-RBT0			\$100.00
JR19803343	Ron4, Jackie		08/31/2016		ArtTherapy		0000000039	20160831-ABCO17-002-BXR0			\$0.00
JR19803343	Ron4, Jackie	No Episode Assig	08/25/2016	Beverly Remm	Cash Payment	Cash	0000000004	20160825-BeverlyR026-003-(\$100.00
JR19803343	Ron4, Jackie	No Episode Assig	08/25/2016	Beverly Remm	Credit Card Paym	Credit Cz	0000000005	20160825-BeverlyR026-004-(\$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: 102855 Omaha, NE 68131
Business Tax ID: 45-685131

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 #: 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
102855
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 Siler

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:

Choose Filter(s):

Date:

☒ All Dates ☐ Date Range to

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	<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

Service Date of Service Charge Amount Payer Plan Status Method Prepare

ArtTherapy 08/26/2016 \$55.00 TIP(TIP 368 Ini Missing Info Invoice ☐

Individual Therapy 09/02/2016 \$100.00 TIP(TIP 368 Ini Missing Info Invoice ☐

Individual Therapy 09/02/2016 \$100.00 TIP(TIP 368 Ini Missing Info Invoice ☐

ArtTherapy 09/02/2016 \$400.50 TIP(TIP 368 Ini Prepared Invoice ☒

Assessment 08/26/2016 \$150.00 Aetna14079-0 Missing Info E ☐

Individual Therapy 08/26/2016 \$100.00 Aetna14079-0 Missing Info E ☐

Group Therapy 02/16/2015 \$155.00 Magellan-01/C Submitted E ☐

Assessment 02/28/2015 \$200.00 Magellan-01/C Submitted E ☐

Group Therapy 03/02/2015 \$155.00 Magellan-01/C Submitted E ☐

Individual Therapy 03/03/2015 \$100.00 Magellan-01/C Submitted E ☐

Excel

Missing Info Report Close

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: Select a filter

Apply Filters

Clear 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

Submit Electronic Claims

Print Outpatient Paper Claims

Print Inpatient Paper Claims

Close

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

Create Invoices

Filters

Choose Filters: Select a filter

Apply Filters

Clear 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:		

Print Invoices

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: 000000000003

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

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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: 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: 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: 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.	

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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.

Setup > Payer

Select a Payer: (AARPMedica) AARP Medical

General | Other Insurance Details | IDs

Type: Insurance (dropdown)
Name*:
Other Name:
Abbreviation*:
Attention To:
Address Line 1*:
Address Line 2:
City*:
State*: (dropdown) Zip*:
Memo:
Elec Payer ID:
Contact Person:
Contact Phone: Extn:
Fax:
Email:
Website:

New Edit Save Cancel Delete Print Exit to Main Menu Exit

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.

Setup > Provider Information

Select a Provider: Behavioral Health, Treatment (BHT)

General | Bill As

General Information: Abbreviation: BHT, First Name: Treatment, Middle Name: , Last Name*: Behavioral Health, Suffix: , Title: , Credentials: , Taxonomy: Residential Treatment Facilities, Code: 324500000X, NPI: 1801018528

Bill As: Copy from Existing Provider, Same as General Information, First Name: Treatment, Middle Name: , Last Name*: Behavioral Health, Suffix: , Title: , Credentials: , Taxonomy: Residential Treatment Facilities, Code: 324500000X, NPI: 1801018528

Assignment/Links: Associated Business*: Best Treat, AccuCare User ID: , Default Location of Service: BHT, Active Provider?: , Default Provider?: , Provider Percentage Amount: %, Accept Assignment: , Signature on File: , Charge Overrides: , Modifiers:

Copy from Existing Provider

Provider: Alai, Ron (RATest)

Alai, Ron (RATest)
Behavioral Health, Treatment (BHT)
Behavioral Health Services
Billing/Clinician, Paul (PauBiller)
Cantore, Jim
CARLSON, STAN
Clinician, Paul (PAC) [Default]
collen, test3
Cup, World
Dylan Biz
Elkridge, Rob
Gormley, Curtis (CGTEST)
Grendal, Peter
Issacs, Mandy
Keller, Sharon H.
Krusty, Krab
Leapholt, Katie A.
Lenagh PC, Jennifer M.
Ramsey, Mike L.
Remm, Beverly (Main)

Show

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