

# **HOME CARE BILLING TRAINING MANUAL**

December 2022

## **Table of Contents**

CREATE INVOICES .....	3
OUTSTANDING INVOICES.....	4
INVOICE HISTORY .....	8
MANAGED CARE/OTHER INSURANCE .....	12
CREATE CLAIMS .....	12
OUTSTANDING CLAIMS .....	13
Step 1 - Demographics.....	14
Step 2 - Verify Insurance.....	16
Step 3 - Verify Visits .....	17
Step 4 - Verify Supplies.....	18
Step 5 - Claim Summary .....	19
CLAIMS HISTORY.....	21
Claim Quick Reports .....	23
CLAIM SUBMISSION HISTORY.....	24
Response File .....	25
REMITTANCE ADVICE .....	26
HELP CENTER.....	28

Users with billing permissions may access the billing center from the main menu. The **Billing** tab contains two main categories:

- The **Invoice** tab allows users to bill and manage invoice payers.
- **Managed Care/Other Insurances** allows for the creation, billing and updating of all managed care payers.

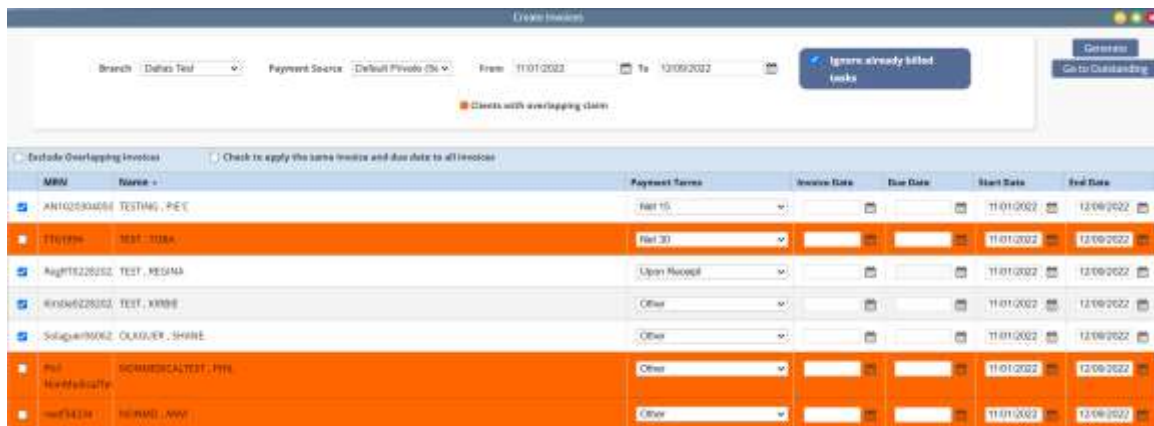
The **Invoice** tab contains three submenus:

- Create Invoices - Used to create invoices for private pay and payers billing on invoices.
- Outstanding Invoices - Once invoices are created, they move into the outstanding invoice page for review and submission.
- Invoice History - This is used to view and update invoices. Features include the ability to view existing client invoices, post and view payments and adjustments.

### CREATE INVOICES

Choose the branch (if more than one), select the payment source and the from and to date. The user has the option to select “Ignore already billed tasks,” which removes tasks that may be associated to another invoice. Then select **Generate** once parameters are entered.

This generates a list of all clients with tasks that meet the criteria. Client invoices that contain an overlapping date range will appear in orange within the list.



By default, only the invoices that do not have an overlapping date range will be selected on the left. Overlapping invoices may be manually selected for invoice creation. Users have the option to hide overlapping invoices by checking the “Exclude Overlapping Invoices” box.

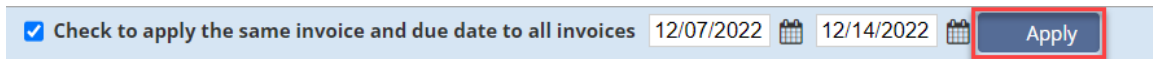


Clients with overlapping claim

Exclude Overlapping Invoices

Check to apply the same invoice and due date to all invoices

Billers may individually enter the invoice date, due date or select [checkbox] to apply the same dates to all selected invoices. If the checkbox is selected, users can enter the invoice and due dates, then select **Apply**.

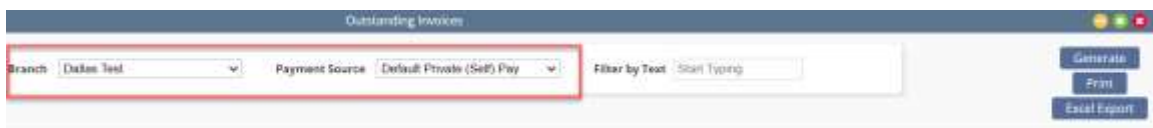


Check to apply the same invoice and due date to all invoices 12/07/2022 12/14/2022 **Apply**

Payment terms default to the payment source set up but may be adjusted. Select the desired checkboxes, then select **Create Invoices** in the top right-hand corner. This creates and moves the invoices to the Outstanding Invoice page. Select the **Go to Outstanding** button to quickly maneuver to the page showing outstanding invoices. The user can also go to Outstanding Invoice by selecting *Billing/Invoice/Outstanding Invoices*.

## OUTSTANDING INVOICES

Select the branch (if more than one), payment source and then select **Generate** to pull the created invoices. Filter by text will filter the generated list by keyword search.



Outstanding Invoices

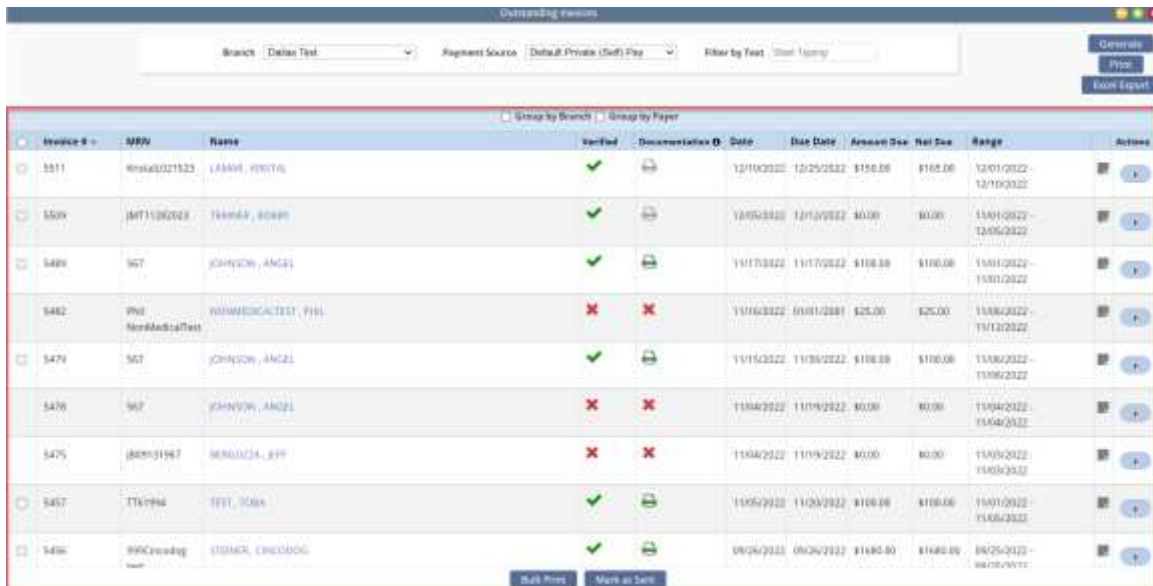
Branch: Dallas Test Payment Source: Default Private (Self) Pay Filter by Text: Start Typing

**Generate**  
**Print**  
**Excel Export**

The generated invoices display the following summary information:

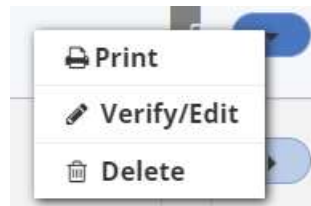
Invoice #, MRN, client name, verified, invoice date, due date, amount due, net due and the invoice date range. In addition, options to group by branch or payer are available. Users can **Print** the Outstanding Invoice List or **Export** the list to Excel.

If the organization has selected to link visit documentation to invoices by selecting *Admin/View tab/Payment Sources/Edit/Information tab/Billing Requirements/Payer Requires Documentation/Save*, the user will see a documentation column next to verified.



Invoice #	MRN	Name	Verified	Documentation #	Date	Due Date	Amount Due	Net Due	Range	Actions
5511	Wm202021523	JAMAR, KRISTY	✓		12/10/2022	12/25/2022	\$150.00	\$150.00	12/01/2022 - 12/10/2022	[Print] [Verify/Edit] [Delete]
5509	JMT11262023	TAKARA, ROBERT	✓		12/05/2022	12/15/2022	\$0.00	\$0.00	11/01/2022 - 12/05/2022	[Print] [Verify/Edit] [Delete]
5489	907	JOHNSON, AMEL	✓		11/17/2022	11/17/2022	\$100.00	\$100.00	11/01/2022 - 11/01/2022	[Print] [Verify/Edit] [Delete]
5482	PHI NonMedicaTest	WINWEDKACTEST, PHILIP	✗	✗	11/16/2022	01/01/2021	\$25.00	\$25.00	11/06/2022 - 11/12/2022	[Print] [Verify/Edit] [Delete]
5479	907	JOHNSON, AMEL	✓		11/15/2022	11/05/2022	\$100.00	\$100.00	11/06/2022 - 11/06/2022	[Print] [Verify/Edit] [Delete]
5476	907	JOHNSON, AMEL	✗	✗	11/04/2022	11/19/2022	\$0.00	\$0.00	11/04/2022 - 11/04/2022	[Print] [Verify/Edit] [Delete]
5475	J00919167	BERKOVZA, JEFF	✗	✗	11/04/2022	11/19/2022	\$0.00	\$0.00	11/05/2022 - 11/05/2022	[Print] [Verify/Edit] [Delete]
5457	TTK1964	TTTT, SOBHA	✓		11/05/2022	11/05/2022	\$100.00	\$100.00	11/01/2022 - 11/05/2022	[Print] [Verify/Edit] [Delete]
5456	PHOKnowledge	OSMKA, LINDSAY	✓		09/24/2022	09/29/2022	\$1490.00	\$1490.00	09/25/2022 - 09/29/2022	[Print] [Verify/Edit] [Delete]

Invoices that are unverified have the following actions: **Print, Verify/Edit** or **Delete**.



Select the client's **Name** to open the invoice for verification.



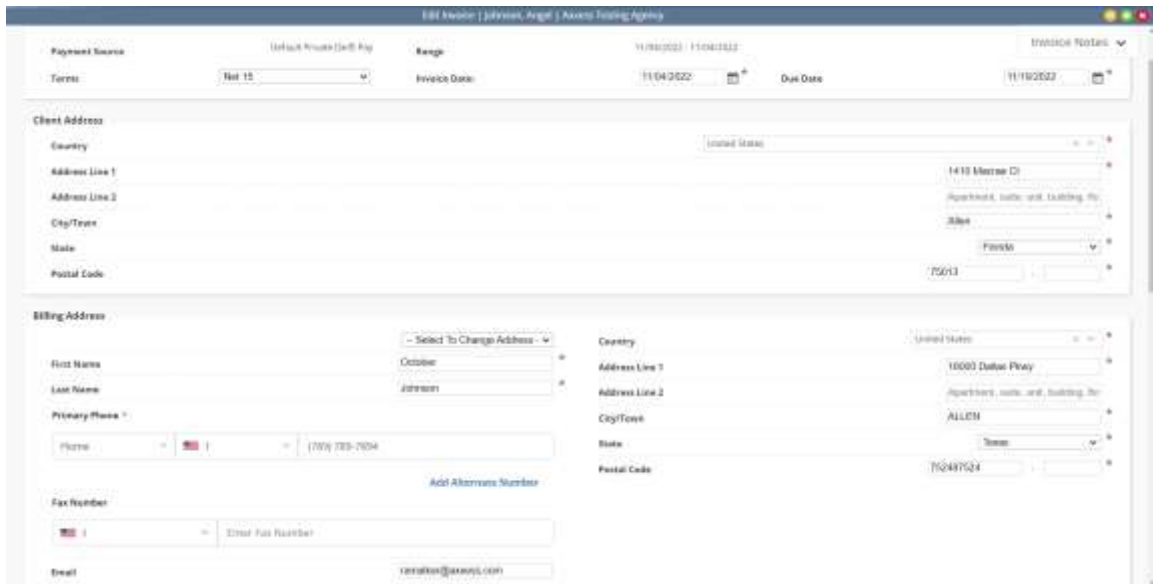
Invoice #	MRN	Name	Verified	Documentation #	Date	Due Date	Amount Due	Net Due	Range	Actions
5476	907	JOHNSON, AMEL	✗	✗	11/04/2022	11/19/2022	\$0.00	\$0.00	11/04/2022 - 11/04/2022	[Print] [Verify/Edit] [Delete]
5475	J00919167	BERKOVZA, JEFF	✗	✗	11/04/2022	11/19/2022	\$0.00	\$0.00	11/05/2022 - 11/05/2022	[Print] [Verify/Edit] [Delete]

The Edit Invoice page displays the details of the invoice and provides editing as needed. Required fields are indicated with a red asterisk (\*). During invoice verification, select **Invoice Notes** in the top right corner to review invoice notes. **Add, Edit** or **Resolve** invoice notes using the respective buttons/hyperlinks.



Name	Last Modified	Comments	Actions
PARIDA, JESSICA	11/12/2022 - 10:39 AM	Payments to invoice will be made in two installments.	Refresh

The top sections display the payment source and date range of the invoice along with modifiable input for terms, date and due date. The client address displays from the Client Profile. The billing address defaults to the client's address but may be updated to other contact payers.



The lower half of the invoice will display billing line items. Select the **Refresh Pre-defined Services/Tasks** button to get an updated list. The quantity and rate are editable by selecting the field. Comments are also available to enter.

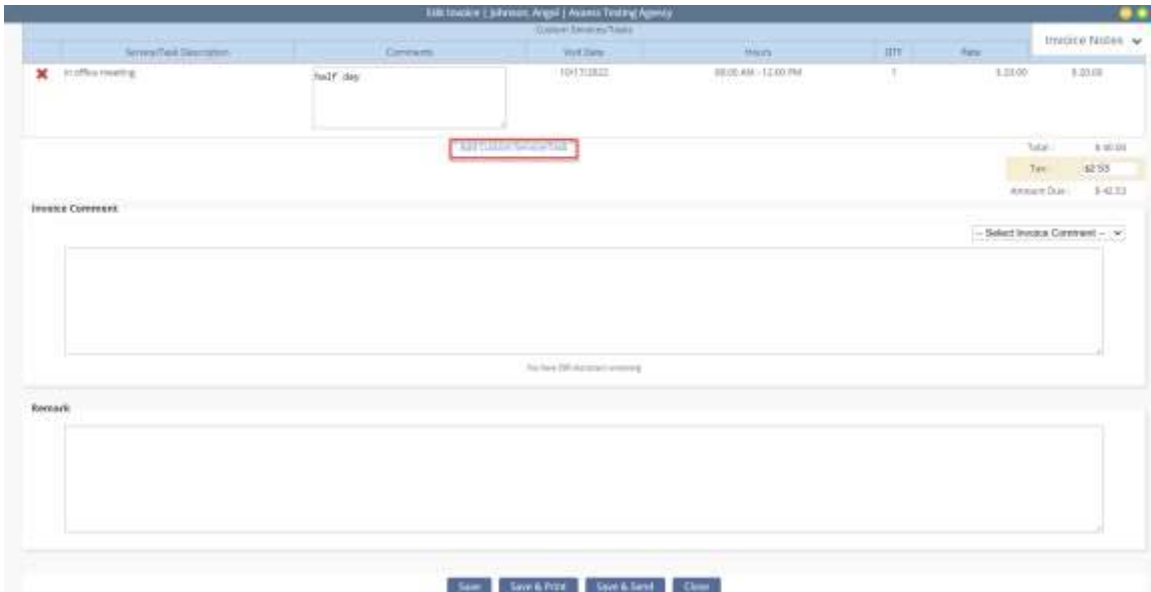
Click "Save or Save & Print" to save any edits and with you make on this grid.



Predefined/Task	Comments	Web Date	Hours	Qty	Rate	Amount
PMS Nov. 10 & M SA		11/04/2022	2 (1:00am - 3:00am)	1.00	9.00.00	9.00.00

The last section provides the ability to add custom service charges. Select the **Add Custom Service/Task** hyperlink to enter the applicable charges. Add any applicable tax, invoice comments, or remarks.

- Select **Save** to complete the verification.
- **Save & Print** to complete and print the invoice.
- **Save & Send** to complete and email the invoice.
- **Close** cancels any changes.



Verified invoices contain a green check mark in the verified column. The red X under the documentation column will change to a gray printer icon, indicating that the system is gathering documentation associated with the invoice. When documentation is gathered, a green printer icon will be available for users to print associated documentation. Once verified, a selection field is activated and the available actions are updated with additional options of **Send**, **Marked as Mailed**, and **Receive Payment**.

Verified	Documentation	Date	Due Date	Amount Due	Net Due	Range	Actions
✓		12/05/2022	12/12/2022	\$0.00	\$0.00	11/01/2022 - 12/05/2022	
✓		11/17/2022	11/17/2022	\$100.00	\$100.00	11/01/2022 - 11/01/2022	<ul style="list-style-type: none"> <li>Print</li> <li>Verify/Edit</li> <li>Send</li> <li>Mark as Mailed</li> <li>Receive Payment</li> <li>Delete</li> </ul>
✗	✗	11/16/2022	01/01/2001	\$25.00	\$25.00	11/06/2022 - 11/12/2022	
✓		11/15/2022	11/30/2022	\$100.00	\$100.00	11/06/2022 - 11/06/2022	


There are several options available to submit invoices to payment sources. Under Actions:

- **Send** enables users to email the invoice to a payer.
- **Print** enables users to individually print an invoice for mailing. Once printed, the user updates the invoice status by selecting **Mark as Mailed**.

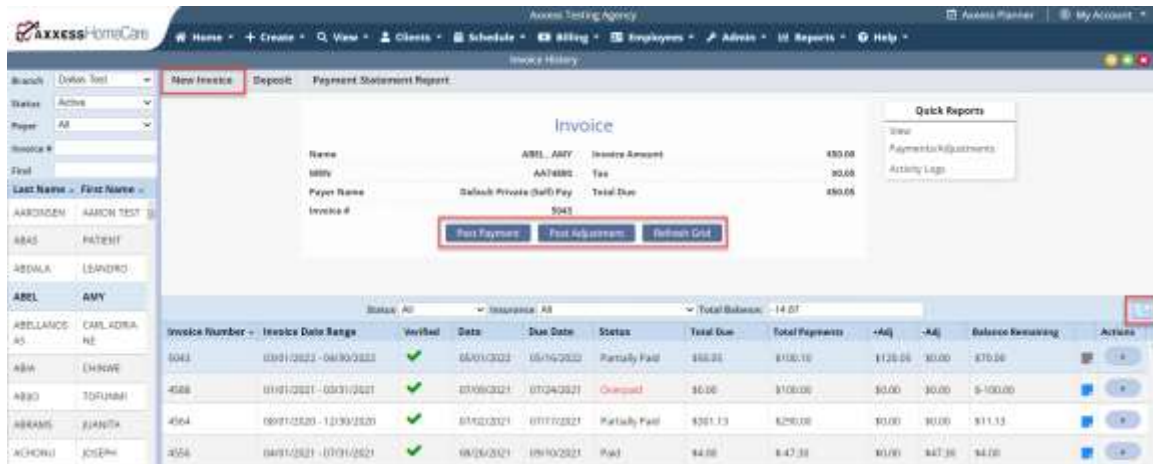
From the invoice list page:













- Multi-select invoices and select **Bulk Print**. The user will have the option to options to include the invoice only, invoice and documentation, or invoice documentation only and select the format of a PDF file or a zip file. Either choice will compile the invoices for selection under *Reports/Completed Reports*.
- Once printed, update the invoice status by selecting the checkbox and selecting the **Marked as Sent** button.

## INVOICE HISTORY

The Invoice History page contains a list of the client's invoices. A new invoice may be added by selecting **New Invoice** at the top of the page. The  icon will expand the list over the invoice summary at the top (select again to collapse). Once an invoice is selected, a summary is displayed in the top section of the page with the options to either **Post Payment**, **Post Adjustment** or **Refresh Grid**.

The information provided in the list includes invoice number, invoice date range, verified, date, due date, status, total due, total payments, + adjustments, - adjustments, balance remaining and actions.



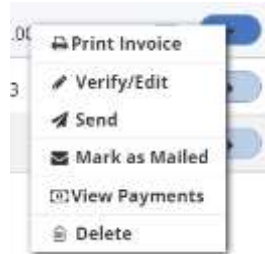
Invoice Number	Invoice Date Range	Verified	Date	Due Date	Status	Total Due	Total Payments	+Adj	-Adj	Balance Remaining	Actions
5043	03/01/2021 - 04/30/2021	✓	05/01/2021	05/14/2021	Partially Paid	\$50.00	\$100.00	\$120.00	\$0.00	\$70.00	  
4568	01/01/2021 - 03/31/2021	✓	03/08/2021	03/24/2021	Overpaid	\$0.00	\$100.00	\$0.00	\$0.00	\$-100.00	  
4564	09/01/2020 - 12/31/2020	✓	01/12/2021	01/17/2021	Partially Paid	\$361.13	\$290.00	\$0.00	\$0.00	\$11.13	  
3056	04/01/2021 - 07/01/2021	✓	06/04/2021	06/10/2021	Paid	\$4.00	\$47.30	\$0.00	\$47.30	\$4.00	  

Options under the Action column include:

- **Print Invoice** enables users to individually print an invoice for mailing.
- **Verify/Edit** confirms the invoice if it is in a created status.
- **Send** enables users to email the invoice to a payer.

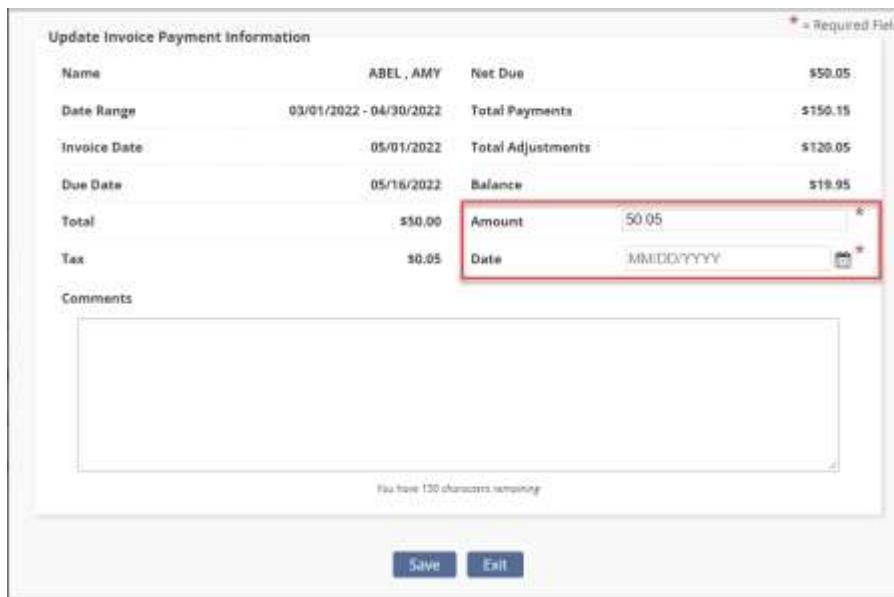


- **Mark as Mailed** confirms the invoice has been mailed to the payer.
- **View Payments** enables users to see payments.
- **Delete** removes the invoice.



Post Payment contains two required fields:

- Amount - Enter the amount of the payment. The system defaults to the net due, update as needed.
- Date - Enter the date of the applied payment.



Update Invoice Payment Information			
Name	ABEL, AMY	Net Due	\$50.05
Date Range	03/01/2022 - 04/30/2022	Total Payments	\$150.15
Invoice Date	05/01/2022	Total Adjustments	\$120.05
Due Date	05/16/2022	Balance	\$19.95
Total	\$30.00	Amount	50.05 *
Tax	30.05	Date	MM/DD/YYYY *
Comments			
<div style="border: 1px solid gray; height: 40px; width: 100%;"></div> <p style="font-size: small; text-align: center;">You have 130 characters remaining</p>			
<input type="button" value="Save"/> <input type="button" value="Exit"/>			

Post adjustment contains three required fields:

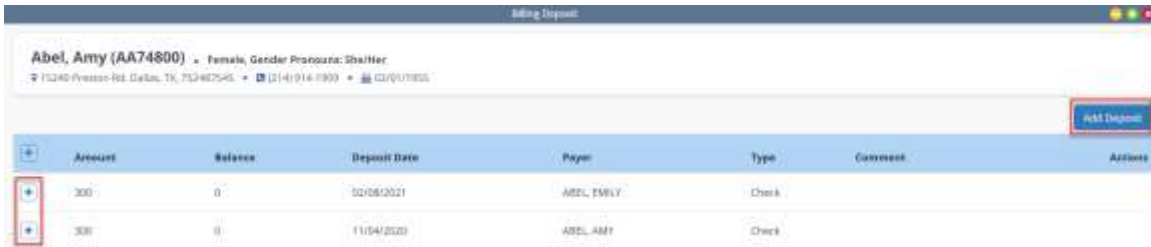
- Amount - Defaults to the invoice balance. Update as needed.
- Date - Indicate the date of the adjustment.
- Adjustment Code - Choose the adjustment reason.

**NOTE:** Adjustment Codes can be added, edited, or deleted in *Admin/Lists/Adjustment Codes* by a user with Admin permissions.

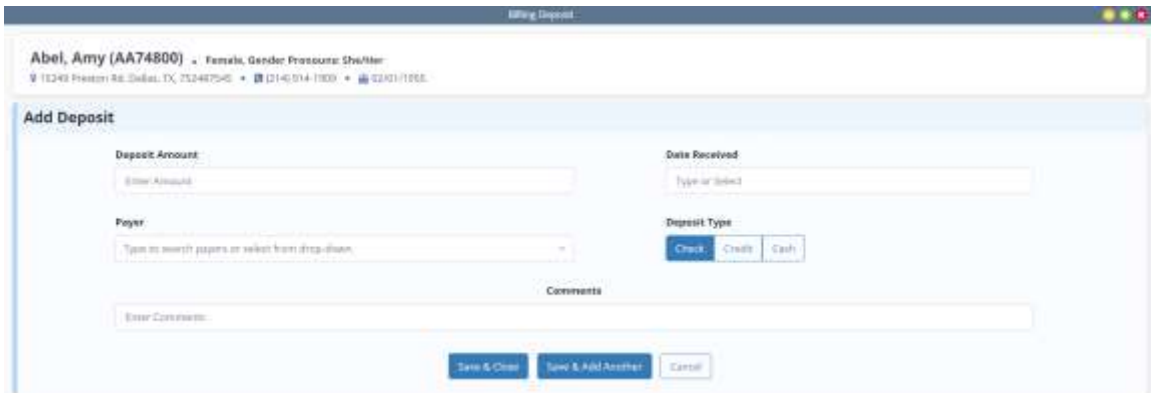
Selecting **Deposit** at the top of the page allows the user to add deposit payments made to the client's account.



The list shows amount, balance, deposit date, payer, type, comments, and actions. Select **+** to the left-hand side of the row to view deposit details. This includes comments, amount applied, date applied, employee who entered the deposit, and type. Select **Add Deposit** to enter a new deposit.



Users can enter the deposit amount, date received, payer, deposit type, and comments. Select **Save & Close** to go back to the list or **Save & Add Another**. Select **Cancel** to return to the deposit screen.



Once a deposit is added, the user can choose to either **Post** or **Refund** the amount added from the Actions column.

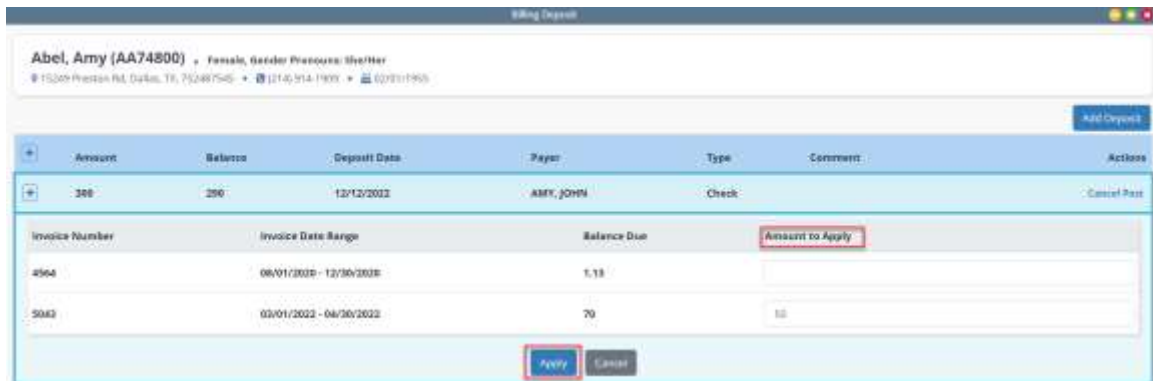


Abel, Amy (AA74800) • Female, Gender Pronouns: She/Her  
 15209 Preston Rd, Dallas, TX, 752487545 • (214) 914-1900 • (214) 914-1900

[Add Deposit](#)

Amount	Balance	Deposit Date	Payer	Type	Comment	Actions
300	300	12/13/2022	AMY, JOHN	Check		<a href="#">Post Refund</a>
300	0	02/08/2021	ABEL, EARLY	Check		
300	0	11/04/2020	ABEL, AMY	Check		

If **Post** is selected, the screen will display the invoice number, invoice date range, balance due and amount to apply. User can add the desired amount to apply to each invoice then select **Apply**. Select **Cancel** to close.



Abel, Amy (AA74800) • Female, Gender Pronouns: She/Her  
 15209 Preston Rd, Dallas, TX, 752487545 • (214) 914-1900 • (214) 914-1900

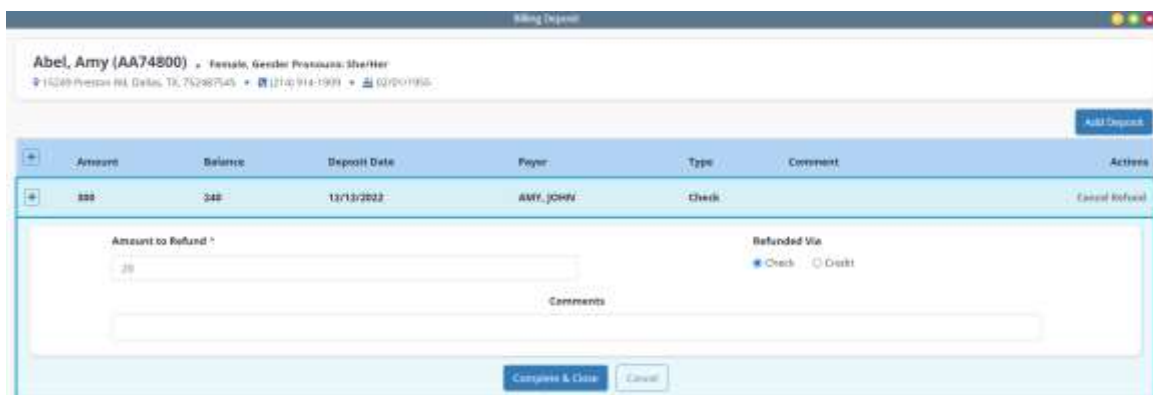
[Add Deposit](#)

Amount	Balance	Deposit Date	Payer	Type	Comment	Actions
300	200	12/12/2022	AMY, JOHN	Check		<a href="#">Cancel Post</a>

Invoice Number	Invoice Date Range	Balance Due	Amount to Apply
4964	08/01/2020 - 12/30/2020	1.18	<input type="text"/>
5043	03/01/2022 - 06/30/2022	70	<input type="text"/>

[Apply](#) [Cancel](#)

If **Refund** is selected, add the amount to refund, select refunded via check or credit, and add any comments. Select **Complete & Close** to record the refund or **Cancel** to close.



Abel, Amy (AA74800) • Female, Gender Pronouns: She/Her  
 15209 Preston Rd, Dallas, TX, 752487545 • (214) 914-1900 • (214) 914-1900

[Add Deposit](#)

Amount	Balance	Deposit Date	Payer	Type	Comment	Actions
300	040	12/13/2022	AMY, JOHN	Check		<a href="#">Cancel Refund</a>

Amount to Refund \*

Refunded Via  Check  Credit

Comments

[Complete & Close](#) [Cancel](#)

Quick Reports are shown to the right of the client information. Select **Activity Logs** to see when the invoice was updated and by whom.

User Name	Action Description	Date
Habiba Ilyasu RN	Invoice has been Sent.	01/21/2022 6:25 AM
Joy Pelingon	Payment Added.	12/13/2021 10:57 AM
Crystal Buffington RN	Invoice has been mailed.	08/12/2021 9:49 AM
Dimple Mistry RN	Claim/Invoice Updated.	07/23/2021 2:22 PM
Mico Cruz RN	Claim/Invoice Added.	07/09/2021 1:52 PM

[Close](#)

## MANAGED CARE/OTHER INSURANCE

The Managed Care/Other Insurances category contains four sub-menus:

1. Create Claims - Used to create claims for payers billing UB-04, HCFA 1500 or ANSI Text File.
2. Outstanding Claims - Once claims are created, they move into the outstanding claims page for review and submission options.
3. Claims History - View and update claims. Features include the ability to view existing client claims post and view payments and adjustments, view the claim in UB-04, HCFA 1500 or ANSI format, update claim status' as well as create a new claim.
4. Claim Submission History - Ability to view submission date, batch number, clients included in a batch and claim responses.

## CREATE CLAIMS

*Billing/Managed Care/Other Insurances/Create Claims*

Choose the branch (if more than one), payment source(s) and date range for which claims are being created. Select **Generate**, then the system will generate a list of claims that match the requested parameters.

Claims identified as having overlapping claim dates will be highlighted in orange. These claims may be excluded from the list by selecting the "Exclude Overlapping Claims" box.

Select the claims to be created and select **Create Claims**. This action moves the claims into the Outstanding Claims page. Users may select the quick link **Go to Outstanding** to navigate to the claim list.



Selecting the **Client Name** opens the claim for verification.

#	Client Name	MRN	Date Range	Detail	View
1	TEST, DUGEE	2921	11/07/2022 - 11/16/2022	✓	✓
2	<b>SAYTOSH, ALEKSEI</b>	343445	12/00/2020 - 12/26/2020	✓	✗
3	AL JAWRI, TAWAN	1C07222020	12/20/2020 - 12/26/2020	✓	✓
4	ABHTAR, PALASH	AB05272020	12/20/2020 - 12/26/2020	✗	✗

### Step 1 - Demographics

Required field completion includes:

- Facility and Bill Type - This defines what type of bill the invoice is. For example: First claim, continuing claim.
- Client Information - Includes client name, address, DOB, gender and client record number.
- Start and End Dates - Indicates the date range of the claim.
- Admission Date - Start of care date.
- First Billable Visit Date - The first billable visit in the claim. Select the **View Schedule** button to verify the first billable visit date from the schedule.
- Client Status - Client's status during the claim date range.
- Diagnoses - A primary diagnosis is required. Non-required fields include additional diagnoses, condition codes and remarks. Ensure population of these if required by the payer.

Also, enter optional condition codes and remarks. Then select the **Verify & Next** button to move to the next step.



The screenshot shows a multi-step verification form. Step 1 of 5 is 'Verify & Next'. Fields include:

- Facility Type:** Home
- Bill Type:** Hospital claim
- Payment Source Bill Type:** Multicare
- Invoice Type:** 6034 1500
- Client Information:**
  - Client First Name: Saitosh
  - Client Last Name: Ale
  - Client Record #: 343445
  - Date of Birth: 01/03/1985
  - Sex: Male
  - Address Line 1: 38000 Collins Place
  - Address Line 2: [empty]
  - City: [empty]
  - State: TN
  - Zip: 37240
- Dates:**
  - Start Date: 12/20/2020
  - End Date: 12/26/2020
  - Admission Date: 12/20/2020
  - First Billable Visit Date: 12/20/2020
- Diagnoses:**
  - Primary Diagnosis ICD-10: J01.10
  - Secondary: J02.0

Buttons include 'View Schedule' and 'Verify & Next'.

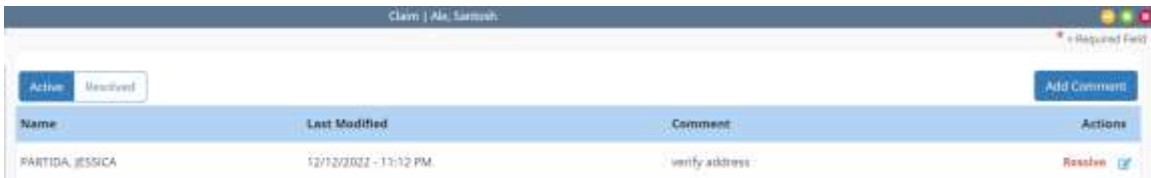
Select the **Claim Notes** button to enter claims throughout the claim verification screens in the top right of the page.



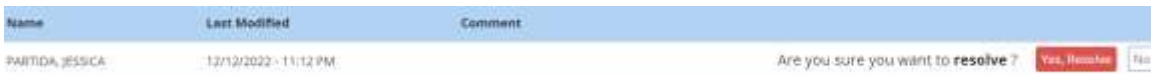
Once the section expands, select the **Add Comment** button. Enter comments in the add comment box and select the **Save & Close** button. Select **Save & Add Another** to save and continue adding comments or **Cancel** to exit without saving comments.



To resolve a comment, select the **Resolve** hyperlink under the Actions column. Select the **Edit** icon to make updates.



Select the **Yes, Resolve** button to confirm resolving the comment.



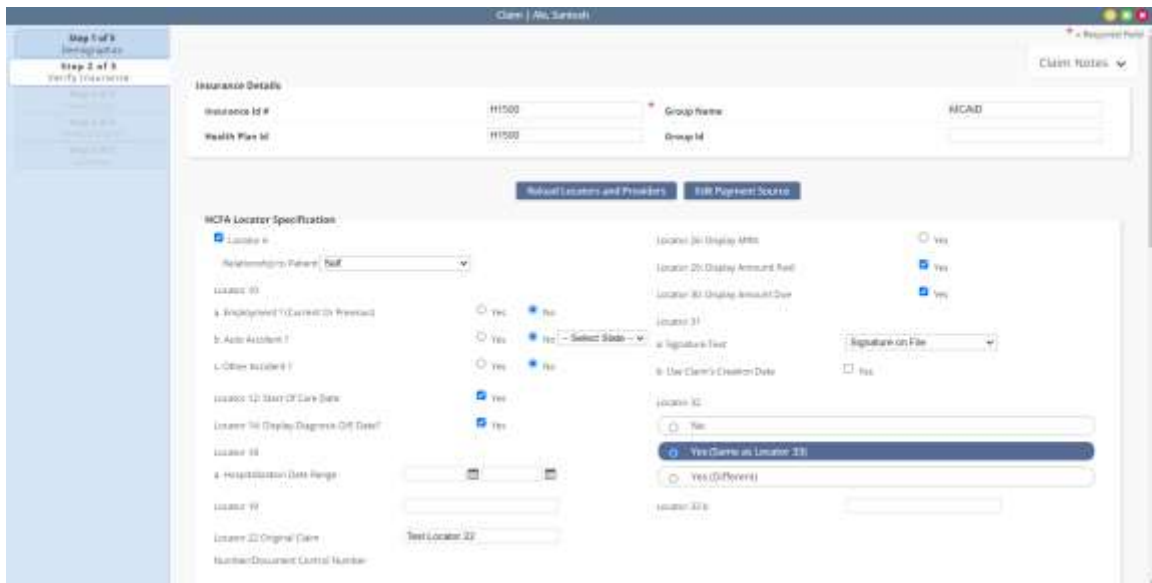
The **Reload All** button resets all changes made to the claim. Any prior claim updates will be lost if **Yes** is selected. Selecting **No** will close the box.







## Step 2 - Verify Insurance

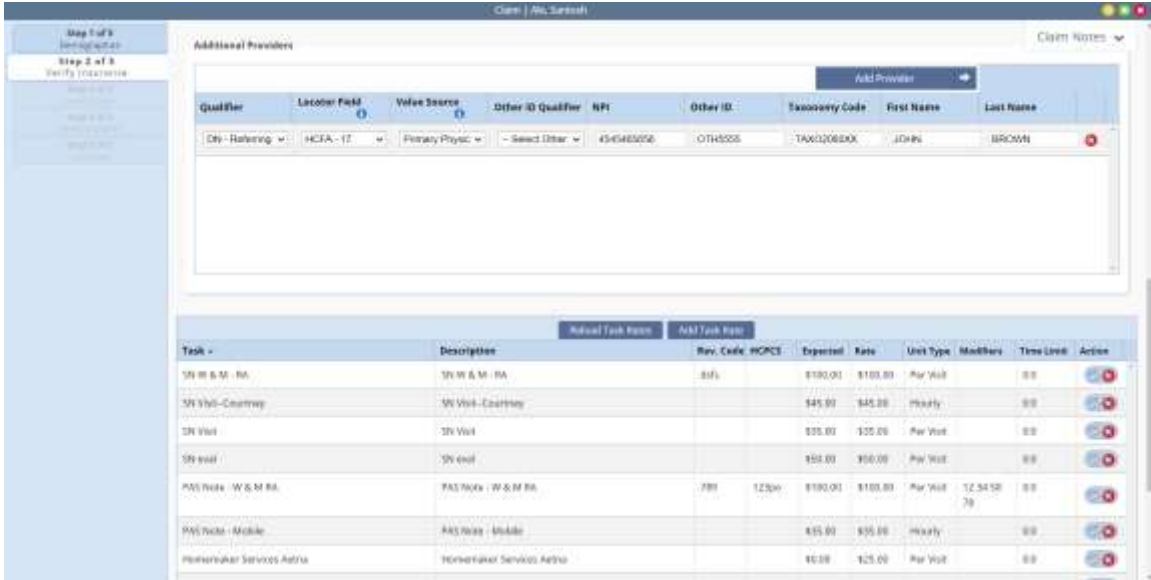
Insurance details pull from the client file. Locator Information (UB or HCFA), Add/Edit locator information as needed. The values displayed pull from the payment source setup. If changes have been made to the payer, select **Reload Locators and Providers** to pull the new requirements into the claim. Select the **Edit Payment Source** button to make updates to the payer.



The lower half of the screen displays additional providers and all rates that have been loaded for the insurance. Select the **Add Provider** button to add a provider, which includes the qualifier, locator file, value source, other ID qualifier, NPI, other ID, taxonomy code and first and last name. To add a task rate, select the **Add Task Rate** button and include the task, preferred description and service unit type. Select the **Save & Exit** button to complete. Select the  icon to make



updates or  icon to remove existing task information as needed. Select the **Verify and Next** or **Next** button to continue to Step 3.



### Step 3 - Verify Visits

The claim date range displays at the top of the page for reference. Tasks group into the following categories:

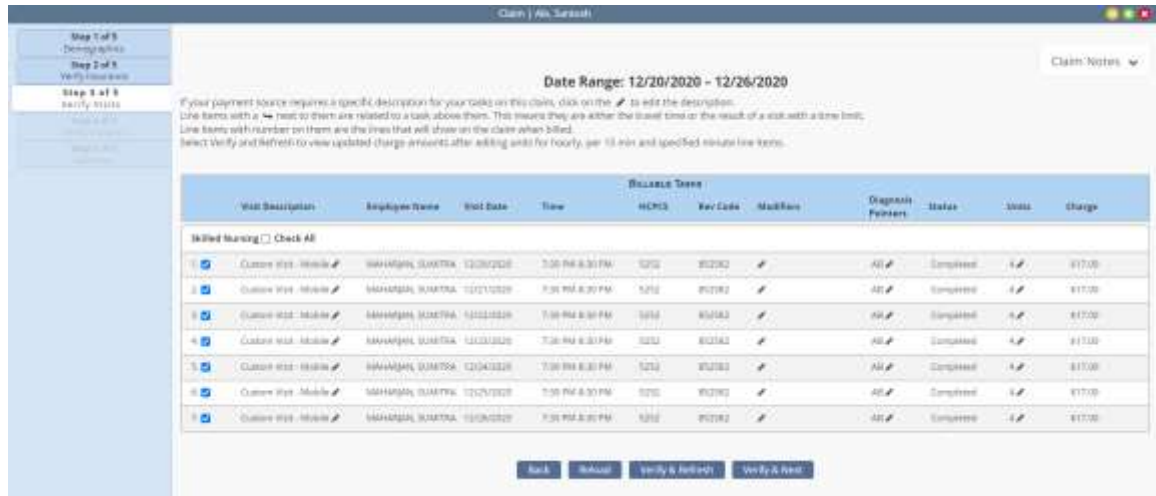
- **Billable Tasks** - Lists all completed tasks that fall within the claim date range. All billable tasks are selected by default. Task description and diagnosis pointers may be edited.
- **Incomplete Tasks** - Displays all outstanding billable tasks that fall within the date range.
- **Unauthorized Tasks** - Lists all completed tasks that fall outside authorization parameters. Users may elect to ignore the authorization warning and bill anyway.
- **Tasks with no associated rate** - Indicates tasks that were completed that are missing insurance rates.
- **Overlapping claim** - Lists tasks that are associated to a claim that overlaps date range.

If no tasks fit a category, the category will not display.

#### Actions include:

- **Back** navigates back to step 2.
- **Reload** reloads the page after changes were made.

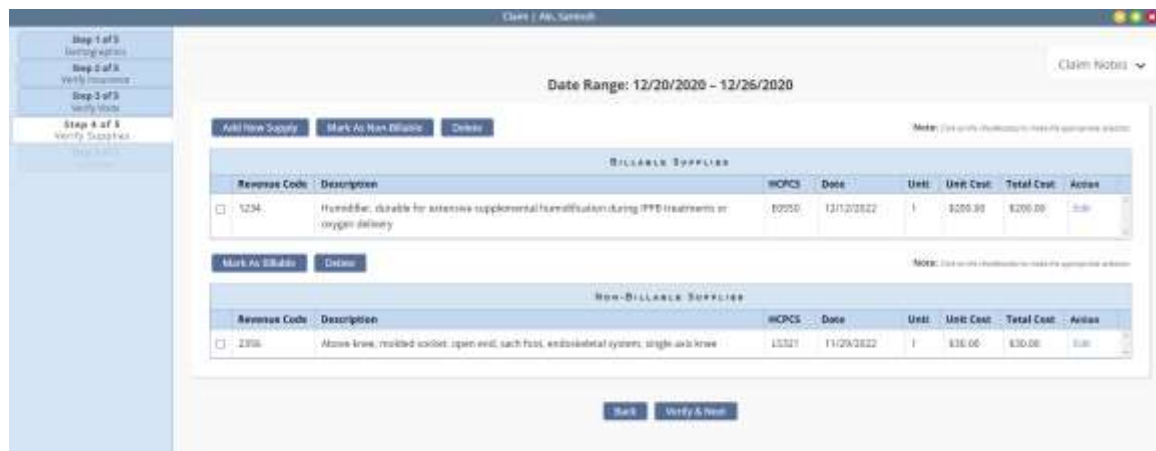
- **Verify and Refresh** verifies the tasks and refreshes the page.
- **Verify and Next** verifies the tasks and navigates to step 4.



Visit Description	Employee Name	Visit Date	Time	HCPCS	Rev Code	Mod/Ren	Dispositn Pointers	Status	Units	Charge
Custom Visit - Mobile	SAHARSHI, SUMITRA	12/20/2020	7:30 PM 8:30 PM	9272	92720		40	Completed	4	\$17.00
Custom Visit - Mobile	SAHARSHI, SUMITRA	12/21/2020	7:30 PM 8:30 PM	9272	92720		40	Completed	4	\$17.00
Custom Visit - Mobile	SAHARSHI, SUMITRA	12/22/2020	7:30 PM 8:30 PM	9272	92720		40	Completed	4	\$17.00
Custom Visit - Mobile	SAHARSHI, SUMITRA	12/23/2020	7:30 PM 8:30 PM	9272	92720		40	Completed	4	\$17.00
Custom Visit - Mobile	SAHARSHI, SUMITRA	12/24/2020	7:30 PM 8:30 PM	9272	92720		40	Completed	4	\$17.00
Custom Visit - Mobile	SAHARSHI, SUMITRA	12/25/2020	7:30 PM 8:30 PM	9272	92720		40	Completed	4	\$17.00
Custom Visit - Mobile	SAHARSHI, SUMITRA	12/26/2020	7:30 PM 8:30 PM	9272	92720		40	Completed	4	\$17.00

## Step 4 - Verify Supplies

Recorded supplies (billable and non-billable) display and can be added, edited, removed and marked as billable and non-billable.

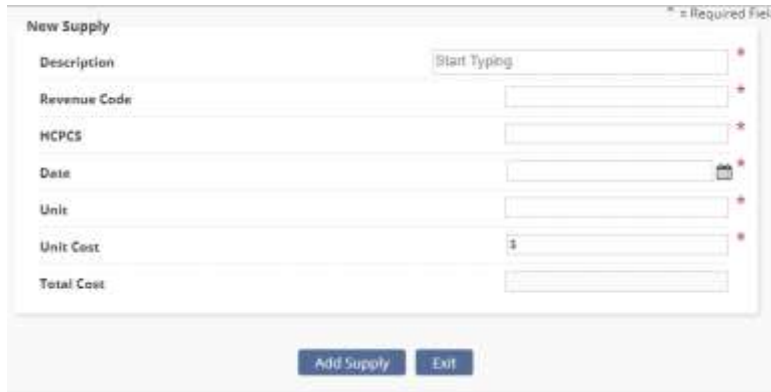


Revenue Code	Description	HCPCS	Date	Unit	Unit Cost	Total Cost	Action
<input type="checkbox"/> 1234	Humidifier, durable for extensive supplemental humidification during IPPV treatments or oxygen delivery	E0250	12/17/2022	1	\$200.00	\$200.00	Edit

Revenue Code	Description	HCPCS	Date	Unit	Unit Cost	Total Cost	Action
<input type="checkbox"/> 2356	Aerosolizer, reusable, scabnet, open vent, each foot, endotracheal system, single axis flow	L5321	11/29/2022	1	\$30.00	\$30.00	Edit

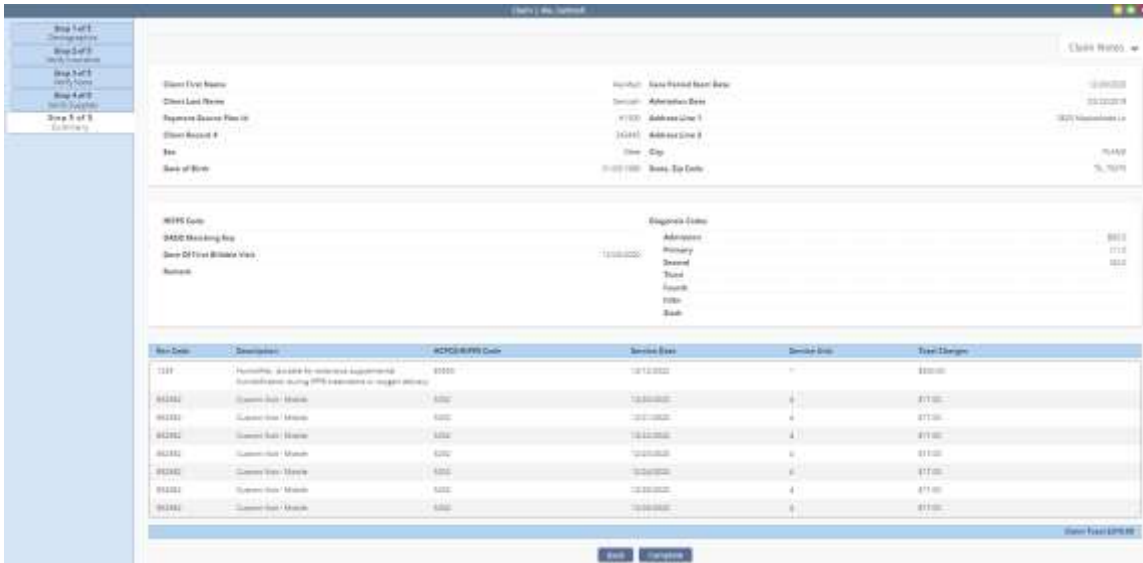
Select the **Add New Supply** button to add a supply to the claim. Enter the description, revenue code, HCPCS, date, unit and unit cost. Then select the **Add Supply** button.



Check the box next to a supply then select the **Mark as Non-Billable**, **Delete** or **Mark as Billable** buttons. To make changes to the supplies, select the **Edit** hyperlink to the right of the supplies. Select **Verify and Next** to go to step 5.

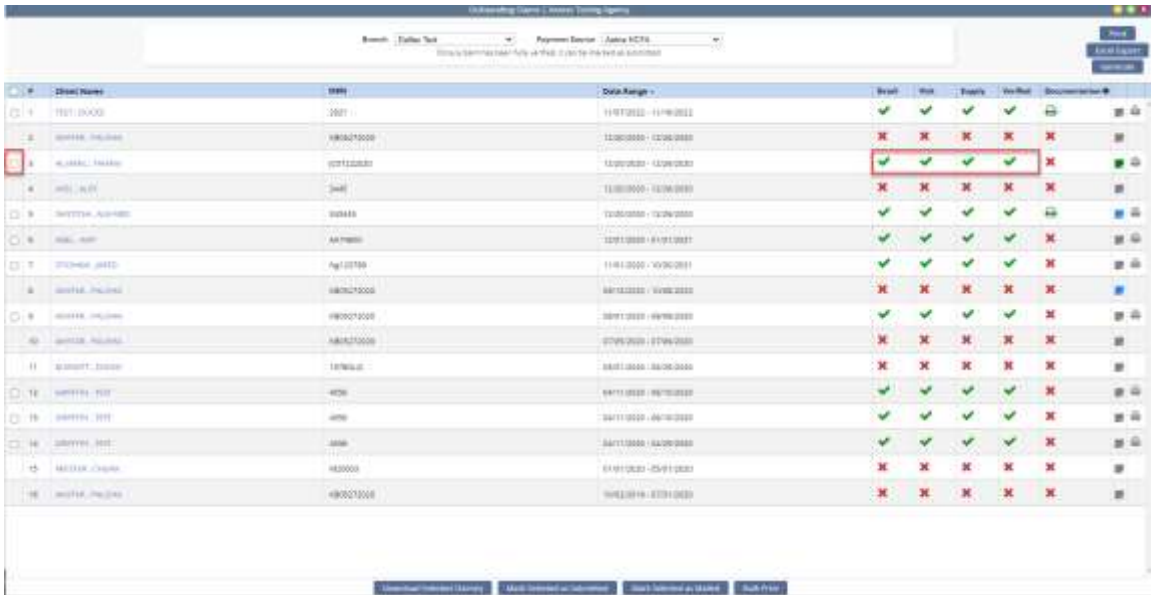
### Step 5 - Claim Summary

Provides a summary review of the claim. Select **Complete** to finish the verification process.



Service Code	Description	HCPCS/MFR Code	Service Date	Service Unit	Total Charges
1311	Humulin, 30/300 for diabetes Supplemental (insulin) during 978 operations or major illness	9300	12/12/2012	-	\$100.00
93282	Current Visit - Mental	9302	12/12/2012	4	\$71.00
93282	Current Visit - Mental	9302	12/12/2012	4	\$71.00
93282	Current Visit - Mental	9302	12/12/2012	4	\$71.00
93282	Current Visit - Mental	9302	12/12/2012	6	\$111.00
93282	Current Visit - Mental	9302	12/12/2012	6	\$111.00
93282	Current Visit - Mental	9302	12/12/2012	4	\$71.00
93282	Current Visit - Mental	9302	12/12/2012	6	\$111.00

A green checkmark displays when the verification is completed for the pages. Once all checkmarks are present, a selection field is present to the left of the claim. The documentation column displays the associated documentation that is available to print with a green printer icon.



#	Claim Name	IBSN	Date Range	Setup	Print	Prints	Verify	Documentation
1	TEST BOOK	2021	11/07/2022 - 11/08/2022	✓	✓	✓	✓	✓
2	WORTH PAID	W0021000	12/01/2020 - 12/01/2020	✗	✗	✗	✗	✗
3	WORTH PAID	W0112200	12/01/2020 - 12/01/2020	✓	✓	✓	✓	✗
4	WORTH PAID	W01	12/01/2020 - 12/01/2020	✗	✗	✗	✗	✗
5	WORTH PAID	W0011	12/01/2020 - 12/01/2020	✓	✓	✓	✓	✓
6	WORTH PAID	W0000	12/01/2020 - 12/01/2020	✓	✓	✓	✓	✗
7	WORTH PAID	W010100	11/01/2020 - 11/01/2020	✓	✓	✓	✓	✗
8	WORTH PAID	W0021000	08/12/2020 - 08/12/2020	✗	✗	✗	✗	✗
9	WORTH PAID	W0021000	08/12/2020 - 08/12/2020	✓	✓	✓	✓	✗
10	WORTH PAID	W0021000	07/05/2020 - 07/05/2020	✗	✗	✗	✗	✗
11	WORTH PAID	W0000	08/01/2020 - 08/01/2020	✗	✗	✗	✗	✗
12	WORTH PAID	W0000	08/11/2020 - 08/11/2020	✓	✓	✓	✓	✗
13	WORTH PAID	W0000	08/11/2020 - 08/11/2020	✓	✓	✓	✓	✗
14	WORTH PAID	W0000	08/11/2020 - 08/11/2020	✓	✓	✓	✓	✗
15	WORTH PAID	W0000	01/01/2021 - 01/01/2021	✗	✗	✗	✗	✗
16	WORTH PAID	W0021000	10/02/2019 - 10/02/2020	✗	✗	✗	✗	✗

Claim submission options depend on the payment source setup. Options include:

1. Electronic Submission - Electronic submission to a clearinghouse by selecting **Submit Selected Electronically**.
2. Download Selected Claims - Users download the claims and then upload to the payer portal or clearinghouse. Once the claim/s are downloaded, the user must mark the claims as submitted to remove them from the outstanding claim page.
3. Mark Selected as Submitted – Enables users to update the status of the claim to submitted.
4. Mark Selected as Mailed – Enables users to update the status of the claim to mailed.
5. Bulk Print - Enables users to print multiple claims for mailing.
  - a. Select all the desired claims then select **Bulk Print**. The user will have the option to combine into a PDF file or a zip file. Either choice will compile the claims for selection under *Reports/Completed Reports*.
  - b. Once printed, update the claim status by **Mark Selected as Submitted**.



2	WORTH PAID	W0000	07/13/2022 - 07/14/2022	✓	✗	✗	✗
3	WORTH PAID	W0000	07/11/2022 - 07/12/2022	✓	✗	✗	✗
4	WORTH PAID	W0011	05/01/2022 - 05/02/2022	✓	✓	✓	✓
5	WORTH PAID	W0011	03/01/2022 - 03/02/2022	✗	✗	✗	✗
6	WORTH PAID	W0011	03/01/2022 - 03/02/2022	✗	✗	✗	✗
7	WORTH PAID	W0011	02/09/2021 - 02/09/2021	✓	✓	✗	✗

13	08/07/19 - 09/07/19	4054	34110300 - 08100000	✓	✓	✓	✓	✓	✗
13	08/07/19 - 09/07/19	4054	84110300 - 08100000	✓	✓	✓	✓	✓	✗
14	08/07/19 - 10/07/19	4059	84110300 - 08200000	✓	✓	✓	✓	✓	✗
15	08/07/19 - 10/07/19	4059	81010300 - 08100000	✗	✗	✗	✗	✗	✗
16	08/07/19 - 10/07/19	4060	70000300 - 07100000	✗	✗	✗	✗	✗	✗

2 Download Selected Claims    3 Bulk Print

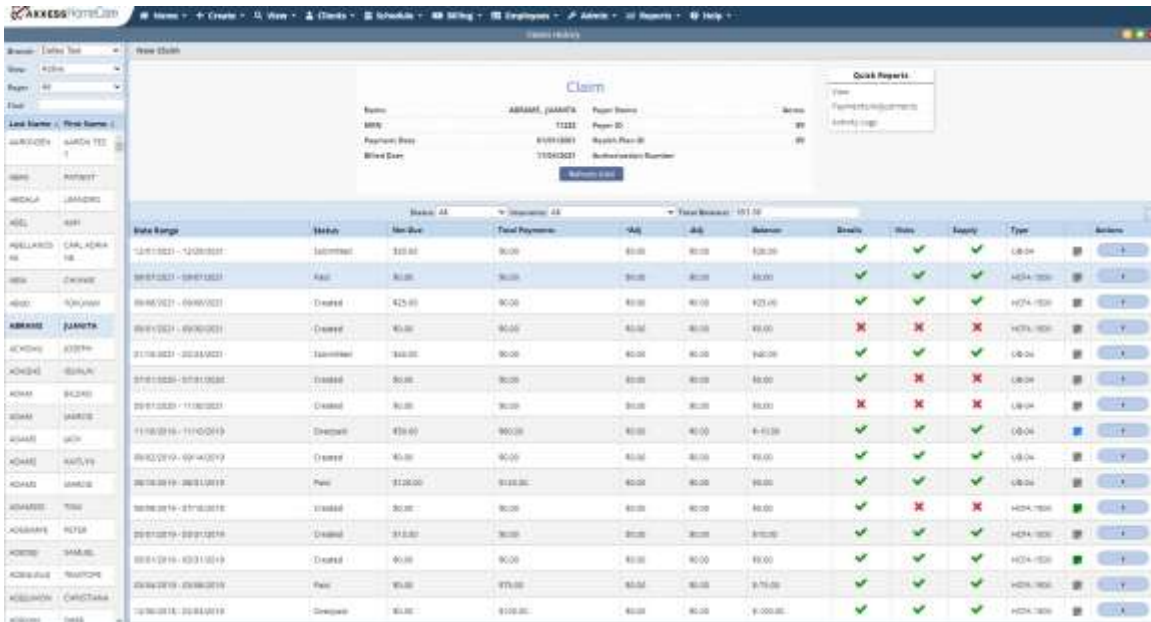
Select the format you would like to print.

Claim Only

ZIP Archive    Combined PDF Document    Cancel

### CLAIMS HISTORY

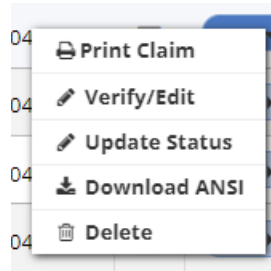
The Claims History page contains the list of a client's claims. For convenience, a new claim may be added by selecting **New Claim** at the top of the page. The icon will expand the list over the claim summary at the top. Select a claim and a summary will then display in the top section of the page with options to either **Post Payment** or **Post Adjustment**. The information provided in the list includes date range, status, net due, total payments, + adjustments, - adjustments, balance, detail, visits, supply, claim type, claim notes, and actions.



Date Range	Status	Net Due	Total Payments	+Adj	-Adj	Balance	Details	Visits	Supply	Type	Actions
12/01/2021 - 12/01/2021	Submitted	\$10.00	\$0.00	\$0.00	\$0.00	\$10.00	✓	✓	✓	UB-04	
08/07/2021 - 08/07/2021	App	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	✓	✓	✓	H2A-1000	
09/06/2021 - 09/06/2021	Denied	\$25.00	\$0.00	\$0.00	\$0.00	\$25.00	✓	✓	✓	H2A-1000	
08/07/2021 - 09/06/2021	Denied	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	✗	✗	✗	H2A-1000	
07/18/2021 - 07/18/2021	Submitted	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	✓	✓	✓	UB-04	
07/01/2021 - 07/01/2021	Denied	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	✓	✗	✗	UB-04	
07/01/2021 - 11/01/2021	Denied	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	✗	✗	✗	UB-04	
11/18/2019 - 11/18/2019	Denied	\$50.00	\$0.00	\$0.00	\$0.00	\$50.00	✓	✓	✓	OB-04	
08/02/2019 - 09/04/2019	Denied	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	✓	✓	✓	UB-04	
08/18/2019 - 08/18/2019	Paid	\$120.00	\$120.00	\$0.00	\$0.00	\$0.00	✓	✓	✓	UB-04	
08/06/2019 - 07/01/2019	Denied	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	✓	✗	✗	H2A-1000	
09/01/2019 - 09/01/2019	Denied	\$10.00	\$0.00	\$0.00	\$0.00	\$10.00	✓	✓	✓	H2A-1000	
08/01/2019 - 03/31/2019	Denied	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	✓	✓	✓	H2A-1000	
08/06/2019 - 08/06/2019	Paid	\$0.00	\$75.00	\$0.00	\$0.00	\$75.00	✓	✓	✓	H2A-1000	
12/08/2018 - 02/01/2019	Denied	\$0.00	\$100.00	\$0.00	\$0.00	\$100.00	✓	✓	✓	H2A-1000	

Available action items depend on the claim status. Most include the ability to:

- Print Claim - To print a paper copy of the claim.
- Verify/Edit - To review or update the claim verification process.
- Update Status - This is the available status which varies depending on the current claim status.
- Download ANSI - Enables users to download the ANSI (text) file for review or submission.
- Delete - Enables users to remove the claim.



**Post Payment** contains two required fields:

- Payment Amount - Enter the amount of the payment. The system defaults to the net due, update as needed.
- Payer - Indicate the payer the received payment is from.
- Other available fields include payment date, check/RA Number the payment is part of, check amount, and any comments.

Select the **Save** button to complete. The claim status will automatically update based on the outstanding balance and includes paid, partially paid and overpaid.



**Post Adjustment** contains three required fields:

- Adjustment Amount - Indicates the amount of the adjustment.

- Adjustment Code - Indicates the adjustment reason.
- Other available fields include date, check/RA Number and amount as well as any applicable comments.



## Claim Quick Reports

To the right of the client information are quick reports associated with the claim selected. This allows the user to view payments and adjustments posted to the claim and an activity log showing when the claim was updated and by whom.



Claim			
Name	ABRAMS, JUANITA	Payer Name	UB-04
MRN	11222	Payer ID	001
Payment Date	01/01/2001	Health Plan ID	001
Billed Date	01/05/2022	Authorization Number	

## View Payments/Adjustments

- Displays all payments and adjustments associated with the claim with the ability to **Update** or **Delete** if needed.
- Users may also quickly add a **New Payment** or **New Adjustment** from this page.



Claims Payment Adjustment

Claim Name: KREL AMV Date Range: 05/01/2021 - 10/01/2021

Payer Name: Axxess HCA Invoice Date: Due Date:

Date	Eff/Check	Amount	Type	Adjustment Code	Payer	Comment	Action
10/01/2021		180.00	Payment		Axxess HCA		Update   Delete
07/14/2021		010.00	Adjustment	00	Axxess HCA		Update   Delete

### Activity Logs

Shows who and when made changes to claims.

User Name	Action Description	Date
Jiman Gallian RN	Payment Deleted.	11/08/2021 1:17 PM
Jiman Gallian RN	Payment Added. (Jiman Gallian RN)	11/08/2021 1:16 PM
Jiman Gallian RN	Adjustment Added. (Jiman Gallian RN)	11/08/2021 1:16 PM
Jiman Gallian RN	Payment Added.	11/08/2021 1:12 PM
Jiman Gallian RN	Payment Updated.	11/08/2021 1:11 PM

Close

### CLAIM SUBMISSION HISTORY


Claims that are electronically submitted will populate to the Claim Submission History page. This menu enables users to review batches of claims, the response files, and the claims within the batch. Select the branch (if more than one), payment source and date range, then select **Generate** to narrow return results. The summary line item displays the batch ID, payer, submission date, number of claims in the batch and an action column from which the user may elect to **View Claims**, **Export** or view the **Response**.

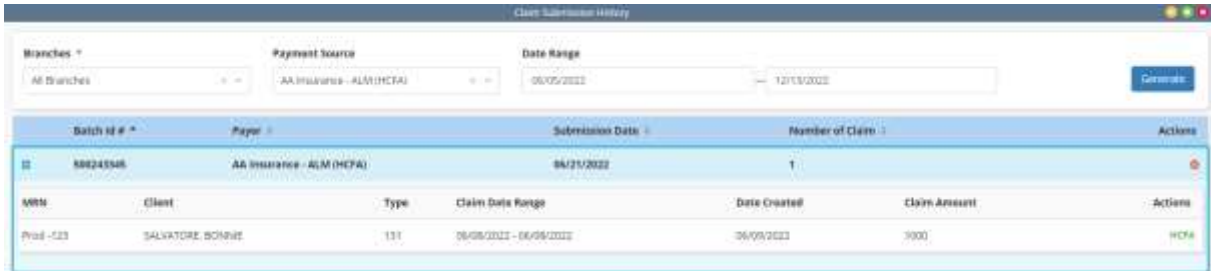
Claim Submission History


Branches: All Branches Payment Source: AA Insurance - ALM (HCA) Date Range: 06/01/2021 - 12/31/2022 Generate

Batch Id #	Payer	Submission Date	Number of Claim	Actions
500340340	AA Insurance - ALM (HCA)	05/21/2022	1	View   Export   Response
500340340	AA Insurance - ALM (HCA)	06/09/2022	1	View   Export   Response
500240550	AA Insurance - ALM (HCA)	06/21/2022	2	View   Export   Response
500240600	AA Insurance - ALM (HCA)	07/28/2022	1	View   Export   Response
500220000	AA Insurance - ALM (HCA)	08/14/2022	1	View   Export   Response
500240510	AA Insurance - ALM (HCA)	08/19/2022	1	View   Export   Response



Selecting the  icon next to the batch will display the list of claims included in the batch. Information includes the MRN, client, type, claim date range, date created, claim amount and access to view the claim by selecting the hyperlink.



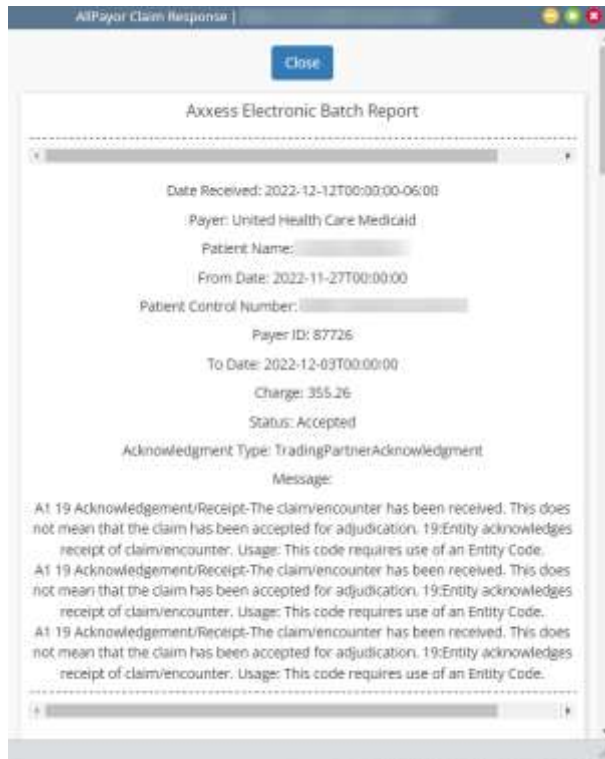
Batch id #	Payer	Submission Date	Number of Claim	Actions
588245548	AA Insurance - ALM (HCPA)	04/31/2022	1	

MRN	Client	Type	Claim Date Range	Date Created	Claim Amount	Actions
Prod-123	SALVATORE BONAZI	131	06/08/2022 - 06/08/2022	06/09/2022	3000	<a href="#">HCPA</a>

### Response File

Select the **Response** hyperlink to the right of the claim. The response file will provide a summary list of the claims. Users can **Close** upon viewing. It will list the date received, payer, patient name, from date, patient control number, payer ID, to date, charges, status, acknowledgement type, and message.



Close

Access Electronic Batch Report

Date Received: 2022-12-12T00:00:00-06:00  
 Payer: United Health Care Medicaid  
 Patient Name:   
 From Date: 2022-11-27T00:00:00  
 Patient Control Number:   
 Payer ID: 87726  
 To Date: 2022-12-09T00:00:00  
 Charge: 355.26  
 Status: Accepted  
 Acknowledgment Type: TradingPartnerAcknowledgment  
 Message:  
 A1 19 Acknowledgement/Receipt-The claim/encounter has been received. This does not mean that the claim has been accepted for adjudication. 19:Entity acknowledges receipt of claim/encounter. Usage: This code requires use of an Entity Code.  
 A1 19 Acknowledgement/Receipt-The claim/encounter has been received. This does not mean that the claim has been accepted for adjudication. 19:Entity acknowledges receipt of claim/encounter. Usage: This code requires use of an Entity Code.  
 A1 19 Acknowledgement/Receipt-The claim/encounter has been received. This does not mean that the claim has been accepted for adjudication. 19:Entity acknowledges receipt of claim/encounter. Usage: This code requires use of an Entity Code.

## REMITTANCE ADVICE

### Billing/Remittance Advice

Remittance Advice pulls into the Home Care solution for all organizations which are set up to bill electronically through Axxess. The section is displayed by check (EFT) number, payment date, payer, received date, payment amount, remaining balance, and claim or invoice count.

Search by payer name, payment start date, payment end date and by EFT number. Once parameters are entered into the filters, select the **Search** button.



Check (EFT) Number	Payment Date	Payer	Received Date	Payment Amount	Remaining Balance	Claims/Invoice Count	Actions
343424	12/07/2022	WSC Dayrent care	12/07/2022	\$900.00	\$900.00	0	<a href="#">View Details</a> <a href="#">EFT</a>
3234254	12/07/2022	Wesling placement	12/07/2022	\$300.00	\$300.00	0	<a href="#">View Details</a> <a href="#">EFT</a>
ClamRA12	12/07/2022	Axxess@CHI Inst	12/07/2022	\$200.00	\$200.00	2	<a href="#">View Details</a> <a href="#">EFT</a>
InvoiceNumber12	12/07/2022	Invoice LLC - ALM	12/07/2022	\$100.00	\$100.00	1	<a href="#">View Details</a> <a href="#">EFT</a>
88051212	12/06/2022	Axxess@CHI Professional	12/06/2022	\$500.00	\$469.00	5	<a href="#">View Details</a> <a href="#">EFT</a>
01987	12/04/2022	SHUAI'S TEST	12/04/2022	\$25.00	\$0.00	1	<a href="#">View Details</a> <a href="#">EFT</a>

Select the **View Details** hyperlink to view the Remittance Details.



EFT 88051212 paid on 12/06/2022

Payment Amount	Remaining Balance	Number of Claims
\$500.00	\$469.00	5

Received Date: 12/06/2022 | Payer Name: Axxess@CHI Professional | Provider NPI: 5834467898 | Provider Tax ID: 123456789

Client	Patient Control Number	DOB	Claim From	Claim To	Claim Amount (Y)	Payment Amount (Y)	Adjustment Amount (Y)	Balance (Y)	Actions
Johann, Amy	308634740Despina08	10/23/2022	11/25/2022	11/25/2022	\$30.00	\$30.00	\$0.00	\$0.00	<a href="#">View</a> <a href="#">EFT</a>
Johann, Amy	308634740Despina08	10/23/2022	10/13/2022	10/13/2022	\$100.00	\$100.00	\$0.00	\$0.00	<a href="#">View</a> <a href="#">EFT</a>
Johann, Ryan	308634740Despina08	11/18/2020	11/18/2020	11/18/2020	\$100.00	\$100.00	\$0.00	\$0.00	<a href="#">View</a> <a href="#">EFT</a>
Johann, Amy	308634740Despina08	10/23/2022	10/12/2022	10/12/2022	\$100.00	\$100.00	\$0.00	\$0.00	<a href="#">View</a> <a href="#">EFT</a>
Johann, Ryan	308634740Despina08	11/18/2020	07/11/2021	07/11/2021	\$100.00	\$100.00	\$0.00	\$0.00	<a href="#">View</a> <a href="#">EFT</a>

5 total results | Show 10 entries

On this page users can view and edit under Actions. Users can also choose to link or unlink claims on an EFT.

To link claims, select the **Link Claims** button. Search by client name, status, and start and end date, then select **Search**. Select the claims to link on the left of the client's name. The link claims button will show a total number of claims selected. Select **Link Claims** to add the claims or **Cancel** to close.

EFT 88051212 paid on 12/06/2022

Payment Amount <b>\$500.00</b>	Remaining Balance <b>\$469.00</b>	Number of Claims <b>7</b>
-----------------------------------	--------------------------------------	------------------------------

Received Date: 12/06/2022    Payer Name: AccessCM Professional    Provider NPI: 5054407890    Provider Tax ID: 125456789

[Link Claims](#) [Cancel](#)

Type or Select Client    Type or Select Status    Type or Select Start    Type or Select End    [Search](#)

NOTE: Claims/invoices that have been paid are not listed below by default. To include paid Claims/invoices in the following list, select Paid in the Claims/invoice status filter.

Client	Patient Control Number	TOD	Claims/Invoice Status	Statement From	Statement To	Claims/Invoice Amount	Balance
<input checked="" type="checkbox"/>	Johnson, Felicia	39F5461240149W2H	Submitted	10/05/2021	10/05/2021	\$100.00	\$100.00
<input checked="" type="checkbox"/>	Johnson, Felicia	39F5461240149W2H	Submitted	09/30/2021	09/30/2021	96.00	96.00
<input checked="" type="checkbox"/>	Johnson, Rowen	39F5461240149W2H	Submitted	10/05/2021	10/05/2021	\$100.00	\$100.00

To unlink claims, select the **Unlink Claims** button. Select the claims to unlink then select the **Unlink Claims** button or **Cancel** to close.

EFT 88051212 paid on 12/06/2022

Payment Amount <b>\$500.00</b>	Remaining Balance <b>\$469.00</b>	Number of Claims <b>7</b>
-----------------------------------	--------------------------------------	------------------------------

Received Date: 12/06/2022    Payer Name: AccessCM Professional    Provider NPI: 5054407890    Provider Tax ID: 125456789

[Unlink Claims](#) [Cancel](#)

Client	Patient Control Number	TOD	Claim From	Claim To	Claim Amount (\$)	Payment Amount (\$)	Adjustment Amount (\$)	Balance (\$)	Action
<input type="checkbox"/>	Johnson, April	39F5461240149W2H	10/23/2022	11/23/2022	\$30.00	\$30.00	\$0.00	\$30.00	View
<input type="checkbox"/>	Johnson, April	39F5461240149W2H	10/13/2022	10/13/2022	\$100.00	\$1.00	\$0.00	\$99.00	View
<input checked="" type="checkbox"/>	Johnson, April	39F5461240149W2H	11/18/2020	11/18/2020	\$100.00	\$0.00	\$0.00	\$100.00	View
<input checked="" type="checkbox"/>	Johnson, April	39F5461240149W2H	10/12/2022	10/12/2022	\$100.00	\$0.00	\$0.00	\$100.00	View

Select the **Add Remittance** button to enter checks. Enter the check (EFT) number, payer, received date, payment date and payment amount, then select the **Create** or **Create and Link** button to complete.

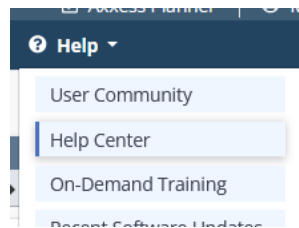
Add Remittance

Check (EFT) Number *	Payer *	Received Date *	Payment Date *	Payment Amount *
<input type="text"/>	<input type="text" value="Type or search payer"/>	<input type="text" value="MM/DD/YYYY"/>	<input type="text" value="MM/DD/YYYY"/>	<input type="text" value="0.00"/>
<a href="#">Create</a> <a href="#">Create &amp; Link</a> <a href="#">Cancel</a>				

## HELP CENTER

### *Help/Help Center*

A great resource that is available 24/7 is our Help Center. It is a place to get answers to frequently asked questions or watch videos of all of Axxess' products. It can be accessed by going to *Help/Help Center*.



Or also available at <https://www.axxess.com/help/>

