

# Reference Guide:

## Billing with Separate Disciplines

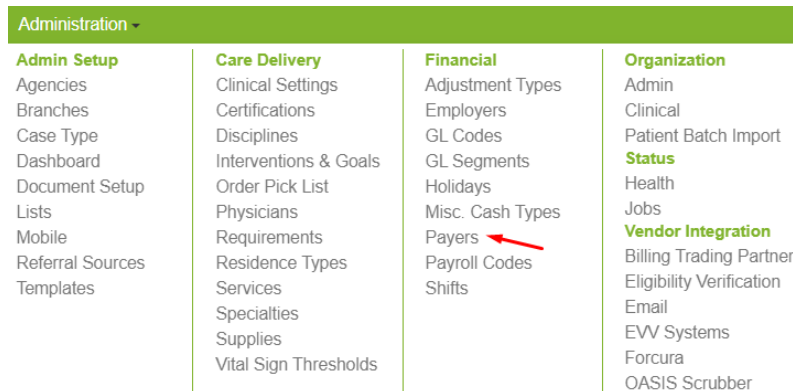
### Overview

Use this procedure if you have a payer that may require claims to be billed separately by discipline. Complete all steps of the guide in order to properly create the claims.

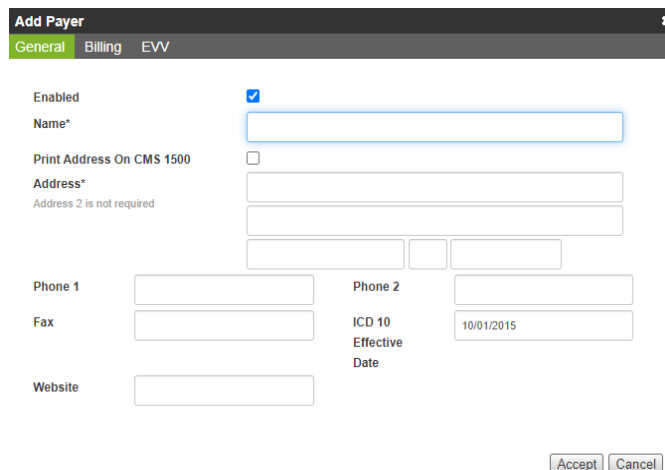
### Procedure

#### Payer Setup

1. Select **Administration** → **Financial** → **Payers**.



2. Click **Add Payer**. The Add Payer dialog will appear.
3. On the **General Tab** - Ensure the Enabled box is **checked**, name the Payer, and **Add** the address in the required fields.



4. On the Billing Tab, **add** the information into the required fields.

- Billing Frequency
- Electronic Payer ID (Clearinghouse Payer ID)
- Bundle Charges
- Electronic Eligibility ID (Dorado/Esolutions Payer ID)
- Billing Trading Partner

**Edit Payer** ✕

General
Billing
EVV

Billing Frequency*	<input type="text" value="BIWEEKLY"/>
Electronic Payer ID	<input type="text" value="00720"/>
Bundle Charges*	<input type="text" value="NO BUNDLING"/>
Electronic Eligibility ID	<input type="text" value="100040"/>
Use Default Billing Trading Partner	<input type="checkbox"/>
Billing Trading Partner	<input type="text" value="Ability - Direct"/>

5. Click **Accept**.

## Plan Setup

**Add** a plan for each discipline for which you need to bill for the payer.

For each discipline:

1. Chose the new Payer from the Payer pick list, select **Manage Plans**. The Plan dialog will appear.

	^ Name	↕ Address
<a href="#">Edit</a> <a href="#">Manage Rates</a> <span style="border: 2px solid red; padding: 2px;"><a href="#">Manage Plans</a></span>	Blue Cross Blue Shield	PO Box 64338, St. Paul, MN 55164

2. Click **Add** a Plan. The Add Plan dialog appears.
3. **Complete** required fields for the General Tab.

**Add Plan** [Close]

General | Billing Configuration | Clinical Configuration | Physician Certification | F2F Encounter Statement | EVV

Enabled

Name \*

Use Payer Address

Address \*  
Address 2 is not required

Address 1

Address 2

City  State  Zip

4. On the Billing tab, enter the following:

- Type
- GL Payer Plan Component (use generic label if there is none)
- Bundle Charges
- Default Form Type
- Electronic Eligibility ID (Dorado/Esolutions Payer ID)
- Professional Epayer ID (Clearinghouse Payer ID)
- Institutional Epayer ID (Clearinghouse Payer ID)
- Billing Frequency
- Reimbursement Type
- Use Payer Billing Trading Partner
- Billing Requirements

**Edit Plan**

General | Billing Configuration | Clinical Configuration | Physician Certification | F2F Encounter Statement | EVV

Type \* Medicare (HMO/managed care/Advantage plan) [v]

GL Payer Plan Component \* BCBS-MC

Bundle Charges \* SERVICE DATE LEVEL BUNDLING [v]

Default Form Type \* INSTITUTIONAL [v]

Electronic Eligibility ID

Professional Epayer ID

Institutional Epayer ID 00720

Billing Frequency \* EPISODIC - 60 [v]

Reimbursement Type \* PDGM [v]

Medicare Reimbursement Percentage \* 80.00 [i]

Medicare Reimbursement Percentage Effective Date \* 01/01/2020

Use Payer Billing Trading Partner  Ability - Direct

Billing Requirements  Automatically Create Authorization Preliminary [v]  
 Co-Pay  
 Preauthorization  
 Service Description  
 Completed Authorization RAP/Final/LUPA [v]  
 No-Pay RAP  
 NOA Required [i] 01/06/2022

- 5. On the Clinical tab, **select** the configuration rules that apply to the plan.
- 6. Click **Accept**.

### Rate Setup

- 1. For each Discipline (Plan), click **Manage Rates**.

Plans: Veterans Administration

			^ Plan	↕ Type	↕ Payer GL Number
<a href="#">Edit</a>	<a href="#">Copy</a>	<a href="#">Manage Rates</a>	HHA	Other government (e.g., TriCare, VA, etc.)	VA
<a href="#">Edit</a>	<a href="#">Copy</a>	<a href="#">Manage Rates</a>	HMKR	Other government (e.g., TriCare, VA, etc.)	VA
<a href="#">Edit</a>	<a href="#">Copy</a>	<a href="#">Manage Rates</a>	PT	Other government (e.g., TriCare, VA, etc.)	VA
<a href="#">Edit</a>	<a href="#">Copy</a>	<a href="#">Manage Rates</a>	RN	Other government (e.g., TriCare, VA, etc.)	VA

- 2. Select **Add Rate** from the Service Rates page. The Service Rates add dialog appears.

**Service Rates - Edit**

Branch	<input type="text" value="Select Branch"/>	Expiration Date	<input type="text" value="MM/DD/YYYY"/>
Effective Date*	<input type="text" value="01/01/2019"/>	Discipline*	<input type="text" value="HHA"/>
Service	<input type="text" value="Select Service"/>	Taxonomy Code	<input type="text"/>
Rate Type*	<input type="text" value="HOURLY"/>	Unit Scale*	<input type="text" value="0"/>
Unit Calculation Type*	<input type="text" value="TIME - MINIMUM ALL UNIT"/>	EVV Service	<input type="checkbox"/>
Form Type	<input type="text" value="Select Form Type"/>		

Rate

Rate Order	Rev Code*	Procedure Code	Bill Rate*	Reimburse Rate*	Unit Min*	Unit Size*	Rate End	1st Modifier	2nd Modifier	3rd Modifier
1	0571	G0156	19.50	7.50	0	15				

- 3. **Enter** all required information.
- 4. Click **Accept**.
- 5. **Continue** adding rates for all required discipline (plans).

## Patient Payer Setup

You will need to add a plan for each discipline for which you need to bill.

1. From the Clients Financial record, **select** the Payers tab.
2. Click **Add**, The Add Patient Plan dialog appears.

3. **Complete** all required information in all tabs.

## Authorization Setup by Plan

1. From the Financial Record Authorizations tab, click **Add**. An authorization form appears.

Dates	Authorization Number	Status	Payer : Plan	Services	Notes	Follow Up Date	Active
08/17/2021 - 08/31/2021	Test 2	Complete	Veterans Administration : HHA	HHA - 10.00 Hours (FFS)			✓
08/17/2021 - 08/31/2021	test 4	Complete	Veterans Administration : PT	PT - 10.00 Hours (FFS)			✓
08/01/2021 - 08/16/2021	test 3	Complete	Veterans Administration : PT	PT - 10.00 Hours (FFS)			✓
08/01/2021 - 08/16/2021	Test 1	Complete	Veterans Administration : HHA	HHA - 10.00 Hours (FFS)			✓

2. **Fill out** all required fields. In the Patient Plan field, be sure to click to select the correct discipline for the plan.

- Once you have completed the authorization and completed all services, click **Accept**. The following is an example of how the screen appears when all authorizations are setup.

### Adding Appointments

When adding an appointment, simply select the correct discipline authorization from the authorization field to ensure the proper setup of the claim.

**Edit Appointment** ✕

Service
Employees
Payroll
Timecard Info
Mileage
Charting

Status*	<input type="text" value="Reviewed"/>	Case Record*	<input type="text" value="FFS - Open"/>
Start Date and Time*	<input type="text" value="01/14/2021"/> <input type="text" value="08:00AM"/>	End Date and Time*	<input type="text" value="01/14/2021"/> <input type="text" value="09:00AM"/>
Discipline*	<input type="text" value="RN"/>	Service*	<input type="text" value="ROUTINE"/>
Authorization*	<input type="text" value="Veterans Administration - RN (07/1/2020 - 0)"/> <span style="float: right; font-size: small;">FFS - RN - HOURLY [Total: 200.0 Hours, Freq.: 200.0 PERIOD, PRN: 0.0]</span>		
Order	<div style="border: 1px solid #ccc; padding: 2px;"> <span style="background-color: #eee; padding: 2px;">Select Authorization</span> <span style="background-color: #007bff; color: white; padding: 2px;">Veterans Administration - RN (07/1/2020 - 07/1/2021, P) ACT</span> <span style="background-color: #eee; padding: 2px;">Blue Cross Blue Shield - Commercial (07/1/2020 - 07/1/2021, S) ACT</span> </div>		
Payroll Type*	<input type="text" value="VISIT"/>	<div style="border: 1px solid #ccc; padding: 2px; font-size: small;">FFS - RN - HOURLY [Total: 200.0 Hours, Freq.: 200.0 PERIOD, PRN: 0.0]</div>	

The process is now complete. The appointments will now generate a claim of services by discipline as shown below.

Payers   Authorizations   Claims   Credits   Service Rates										
Claims										
Total Billed Amt: \$9,938.00    Total Reimb Bal: \$2,530.00										
Claim - Invoice	Status	Claim State	Payer - Plan	Claim Type	Claim Dates	Billed Amt	Reimb Bal	Form Type	Follow Up	Actions
<input type="checkbox"/> 000000000869 - 000000000968	Outstanding	✓ Rules Met	Veterans Administration - PT	FFS - FFS	08/19/2021 - 08/31/2021	\$928.00	\$544.00	Institutional		Charges More
<input type="checkbox"/> 000000000868 - 000000000969	Outstanding	✓ Rules Met	Veterans Administration - PT	FFS - FFS	08/04/2021 - 08/16/2021	\$1,392.00	\$816.00	Institutional		Charges More
<input type="checkbox"/> 000000000866 - 000000000964	New	✓ Rules Met	Veterans Administration - HHA	FFS - FFS	08/17/2021 - 08/31/2021	\$156.00	\$60.00	Institutional		Charges More
<input type="checkbox"/> 000000000865 - 000000000963	New	✓ Rules Met	Veterans Administration - HHA	FFS - FFS	08/01/2021 - 08/16/2021	\$546.00	\$210.00	Institutional		Charges More

