ECHOVANTAGE CLAIMS REPROCESSING

ASSUMPTIONS

This User Guide is created for the Billing User. An understanding of the Fiscal Overview functions and the Basic Billing Workflow is assumed for the following examples. Click HERE for the Fiscal Overview section of the EchoVantage Online Webhelp.

OVERVIEW

Claims Management Reprocessing

There are times when the Charge created for the Service is incorrect or must be submitted more than once. In addition, missing Payer-specific modifiers, delayed communication regarding changes in Client coverage, rebilling a claim denied in error, and retroactive Payer rate changes require some flexibility after the Create Charges and Create Bills processes. In EchoVantage, these types of changes are handled by the reprocessing options in the *Action* drop-down box on the Claims Management screen. These options are listed below.

- Rebilling Outgoing and Denied Charges
- Reprocess Active Payer
- Reprocess All Payers
- Reverse Service Transactions

Which Action Do I Need to Choose?

Understanding which Action to use helps achieve the desired result quickly and without unintended extra work. The following table gives a brief overview of each Action. A detailed description, with examples, is contained in the following sections.

Reprocessing Action	Use When
Rebilling Outgoing and Denied Charges	Nothing about the Charge needs to change.
Reprocess Active Payer	Only the Charge information for the Active Payer needs to be modified. Nothing needs to change for a previous Payer
Reprocess All Payers	All Charges for all Payers need to be modified, but nothing needs to change about the Service.
Reverse Service Transactions	Service information needs to be modified.

REBILL OUTGOING AND DENIED CHARGES

The *Rebill Outgoing and Denied Charges* action sets the Charge Status back to Active, so it may be rebilled using the *Fiscal Overview > Unbilled Charges > Create Bills* screen. The Action only affects the currently active Payer and requires the Charge Status to be either *Outgoing* or *Denied.* This is the only job that does not require a job message as it simply resets the Charge Status (*dbo.Charges.Status* changes from 'O' to 'A' in the database), making the Charge immediately available to select in a Create Bills job. This Action does not correct or update rate and unit calculations or modifier changes; these are determined during the Charge Creation process.

Example

Client Sandy Beach received an ADP Service on 06/01/2021. The Service was processed, and a bill for $50.00 was created. The Payer initially denied the claim due to an incorrect Policy Number. A quick investigation determined the Policy Number was updated, but not until after the Bill for the Service was created. Rebilling the Charge will fix the Policy Number issue so the Payer will remit payment. The following example allows the Denied Charge to be included in a new Create Bills job.

To Rebill the Charge, select the *Rebill Outgoing and Denied Charges* option in the Action drop-down list.

The Transaction Date defaults to the current date, and both the Message and Transaction Date fields are not editable. Click on the blue *CONTINUE WITH RESULTS* button to proceed; a confirmation box displays indicating the number of selected Claims that can be set back to Active.

Select the blue *REBILL* button to complete the process. The Charge is returned to *Active* Status, as shown below.

CLAIMS MANAGEMENT	REPROCESSING HISTORY	REPROCESSING ERRORS

Client	Staff	Service Start	Service End	Billing Start	Billing End
BE0000 Beach, Sandy ✕ ▾	Start typing to search... ▾	06/01/2021 📅			

Payer	Payer Category	Defined Filter	Charge Status	
Start typing to search... ▾	Start typing to search... ▾	Start typing to search... ▾	Start typing to search... ▾	**SEARCH**

BE0000 Beach, Sandy   Payer Balance: $ 40.00   Client Balance: $ 10.00

	Date	Service	Staff	Active/Last P...	Charge Status	Service Status	Last Billed	Charge	Paid	Payer Balance	Client Balance
☐	06/01/2021	ADP	HS1	CC	Active	Charge Created	06/07/2021	$ 50.00	$ 0.00	$ 40.00	$ 10.00

|< < > >| 1 of 1   Total Payer Balance: $ 40.00   Total Client Balance: $ 10.00

Action *	Message	Transaction Date
Start typing to search... ▾		06/07/2021 📅 CONTINUE WITH RESULTS

This Charge is now available to select in the *Unbilled Charges > Create Bills* screen.

REPROCESS ACTIVE PAYER

Select Reprocess Active Payer when a new Create Charges calculation is needed. **Only claims with a Charge Status of *Active* or *Outgoing* are reprocessed with this Action.** Reprocessing Active Payer voids the current Charge, related copay, and associated payments by creating reversing entries. The original Charge and the reversing Charge are marked as void in the database to preserve the transaction history. The reprocessing Action creates a new charge, so changes in charge calculation, unit calculation, and modifiers are picked up. Reprocessing also creates a copy of the original remittance with a Status of *Reprocessed* to facilitate finding and applying a previous payment. Like the rebill Action above, *Reprocess Active Payer* sets the Charge Status from *Outgoing* to *Active.*

Example

In this example, Client Sandy Beach received an ADP Service on 5/20/2021. The Claim Details for this ADP claim are shown below. The following reprocessing example allows a new charge with an updated rate to be created.

Enabling the *Show Reprocessed Charges* toggles confirms there are currently no reprocessed charges.

For this example, the current rate is end-dated, and a new rate is entered that encompasses the Service date for the Payer and ADP Service, *Configuration > Services/Payers > Payers > Rates.* **After reprocessing, the new Charge will be $35.00, NOT $50.00.**

Create the Reprocessing Job

From the Claims Management screen, filter the results or select the claim to be reprocessed. Then select *Rebill Active Payer* in the *Actions* drop-down, enter a job *Message,* and enter the *Transaction Date.*

- The *Message* is used to identify the job on both the *Reprocessing History* and the *Reprocessing Errors* screens.
- The *Transaction Date* is used to determine the GL Posting Period and defaults to the current date but may be edited. The default date was used in the example to make identifying the original and new charges easy.
- Depending on your agency's fiscal policies, the Transaction Date may be the same as the *Service Date* of the original Charge, in the same month, or the actual date of reprocessing.

Note that if individual claim checkboxes are selected, the blue button message changes from *CONTINUE WITH RESULTS* to *CONTINUE WITH SELECTION.*

Select the blue *CONTINUE WITH RESULTS (SELECTION)* button.

A confirmation box appears indicating the number of claims that meet the job requirements out of the total claims selected. Select the blue *REPROCESS* button to create the reprocessing job.
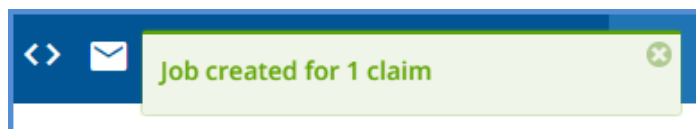
Look for a green success toast to display in the upper right-hand corner, then navigate to the *Reprocessing History* screen.

Review and Finalize the Reprocessing Job

The *Reprocessing History* screen displays unfinalized jobs first with a secondary sort by *Date* from most recent to oldest. Jobs with a *Status* of Pending, In Progress, Failed, or Preview are considered unfinalized. Jobs with a *Done* or *Reversed* status are displayed after unfinalized jobs, sorted by *Date* from most recent to oldest.

CLAIMS MANAGEMENT	REPROCESSING HISTORY	REPROCESSING ERRORS					

Start Date	📅	End Date	📅	User					Status	▾

Date	Job Type	Job Status	Created By	Message		Services	Errors	
06/04/2021	Reprocess Active Payer	Preview	heather.sherwood	CC updated fee schedule		1	0	**FINALIZE** ▾
04/27/2021	Reprocess All Payers	Done	heather.sherwood	to precharge		1	0	
03/02/2021	Reprocess All Payers	Done	heather.sherwood	Waterfall Correction		2	0	
10/27/2020	Reverse Service Transactions	Done	heather.sherwood	318		1	0	
02/04/2020	Reverse Service Transactions	Done	heather.sherwood	Reverse to Not Ready Status		1	0	
02/03/2020	Reverse Service Transactions	Done	heather.sherwood	Correcting		1	0	

Details

Service Date	Client	Duration/Units	Last Active Payer	Last Active Charge	Current Active Payer	Current Active Charge
05/20/2021	BE0000 Beach, Sandy	60 min	CC	$ 50.00	CC	$ 35.00

The example *Reprocess Active Payer* job is at the top of the list in the image above; the row is selected to show the job *Details.* As expected, the (new) *Current Active Charge* is $35.00.

BE0000 Beach, Sandy								Payer Balance: $ 0.00	Client Balance: $ 0.00

☐	Date	Service	Staff	Active/Last Pa...	Charge Status	Service Status	Last Billed	Charge	Paid	Payer Balance	Client Balance
☐	05/20/2021	ADP	HS1	-	Reversed	Charge Created	06/03/2021	-	$ 0.00	$ 0.00	$ 0.00

In EchoVantage version 3.25+, while the reprocessing job remains unfinalized, the Claims Management screen shows the original Claim as *Reversed* with a dash for both the *Active/Last Payer* and the *Charge* columns.

Select the job row to view the Claim Details.

The image above shows the details with the *Show Reprocessed Charges* toggle enabled. The entries created by reprocessing are outlined in red. Both the reversing entries and the new charge items have *PRECHARGE* status while the job remains unfinalized. Return to the *Claims > Reprocessing History* screen, select *Finalize* to complete the reprocessing job. A green confirmation box should display in the upper right-hand corner.

Returning to the Claims Management screen, the Charge Status is now *Active,* and the Charge (amount) is $35.00.

Select the row again to view the *Claim Details.* Only the current (newly created) charges display when the *Show Reprocessed Charges* toggle is not enabled.

Create Bills for the Reprocessed Charge

These now *Active* charges (Payers CC and SELF) are available to include in a *Fiscal Overview > Unbilled Charges > Create Bills* job. Once a *Create Bills* job is processed and finalized, the Charge Status is updated to Outgoing. This step may not be required depending on your reasons for reprocessing. If there is no need to send a corrected bill to the Payer, it is OK to move on to the Apply the Reprocessed Payment section.

Apply the Reprocessed Payment

After the Active Payer is reprocessed and bills are created (if needed), the copy Remittance can be applied.

Select the Reprocessed Remittance to view the Remittance Details.

The Status is *Reprocessed,* and no charge is selected. To apply the *Reprocessed* Remittance, change the Status to *Not Ready* and select the appropriate Charge.

Save and mark *Ready* on the Remittances screen or change the Remittance Status to *Ready* before saving, depending on your specific workflow. In the example above, the status was changed to *Not Ready,* the correct Charge was selected, and then the status was updated to *Ready* before *SAVE* was selected. Once the remittance is marked *Ready,* it is available to include in a *Fiscal Overview > Unprocessed Remittances* job. The image below shows the updated Claims Management record after the remittance is processed and finalized.

The Payer Balance is $0.00, and the Client Balance is $10.00.

REPROCESS ALL PAYERS

Reprocess All Payers creates reversing entries for the existing charges, copays, and any related payments for ALL PAYERS, not just for the currently active Payer. Reprocessing All Payers follows the same process as outlined in the *Reprocess Active Payer* section above.

Example

The following claim has Charges and Payments for two Payers. The example works through reprocessing all Payers and reapplying the Remittances.

Claim Details   ✕

Barnhill, Kelsey (000001)

Birth Date: 12/01/2000
Phone: (603)731-1813
Address:
2 Farmview Ave
Center Conway, NH 03813

Name	Policy Number	Priority	Notes
NOACORN	Kelsey's Policy	10	
CC	KB-CC-001	15	
SELF		99	

Mental Health Counseling   90866   05/31/2021

🔵 Show Reprocessed Charges

NOACORN   📋 NOTES & TASKS

Date	Amount	Reason	Last Billed	Authorization	Status	Procedure Code	Diagnosis
05/31/2021	$ 200.00	CHARGE CREATED	06/04/2021		DONE	90866	F40.232
06/01/2021	$ 100.00	PAYER PAYMENT					
06/01/2021	$ 85.00	BALANCE ZEROING CREDIT					
06/01/2021	$ 15.00	FEE ADJ					
Total Balance:	**$ 0.00**						

CC   📋 NOTES & TASKS

Date	Amount	Reason	Last Billed	Authorization	Status	Procedure Code	Diagnosis
06/01/2021	$ 200.00	CHARGE CREATED	06/04/2021		ACTIVE	90866	F40.232
06/01/2021	$ 15.00	FEE ADJ					
06/01/2021	$ 100.00	PAID BY OTHER					
06/02/2021	$ 50.00	PAYER PAYMENT					
Balance:	**$ 35.00**						
Total Balance:	**$ 35.00**						

SELF   📋 NOTES & TASKS

Date	Amount	Reason	Last Billed	Authorization	Status	Procedure Code	Diagnosis
05/31/2021	$ 15.00	CHARGE CREATED	06/04/2021		OUTGOING	90866	
Balance:	**$ 15.00**						
Total Balance:	**$ 15.00**						

The following modifiers were added to the Service Definition Rates tab to identify the new Charge for Payer 1. Payer 1 uses the Service Definition Default Rate; there are no changes to the rate or unit calculation.

Procedure Modifiers

Condition *		Defined Filter		Code *	Position *	
Always	✕ ▾	Outpatient MH	✕ ▾	TS	1	🗑
Always	✕ ▾	Start typing to search…	▾	GT	2	🗑

+ ADD PROCEDURE MODIFIER

Create the Reprocessing Job

Navigate to the Claims Management screen.

CLAIMS MANAGEMENT	REPROCESSING HISTORY	REPROCESSING ERRORS

Client
000001 Barnhill, Kelsey

Staff
Start typing to search...

Service Start **Service End** **Billing Start** **Billing End**

Payer
Start typing to search...

Payer Category
Start typing to search...

Defined Filter
Start typing to search...

Charge Status
Start typing to search...   **SEARCH**

000001 Barnhill, Kelsey   Payer Balance: $ 35.00 Client Balance: $ 15.00

	Date	Service	Staff	Active/Last P...	Charge Status	Service Status	Last Billed	Charge	Paid	Payer Balance	Client Balance
✓	05/31/2021	MHC	HS1	CC	Active	Charge Created	06/04/2021	$ 200.00	$ 50.00	$ 35.00	$ 15.00
☐	05/20/2021	MHC	HS1	NOACORN	Done	Done	06/02/2021	$ 200.00	$ 200.00	$ 0.00	$ 0.00
☐	05/01/2021 - 05/0...	RESMH	AJD001	NOACORN	Done	Done	06/02/2021	$ 930.00	$ 930.00	$ 0.00	$ 0.00
☐	05/22/2020	EMS	HS1	CC	Done	Done	03/16/2021	$ 500.00	$ 500.00	$ 0.00	$ 0.00
☐	04/30/2020	MHC	EH123	CC	Done	Done	08/07/2020	$ 8,000.00	$ 8,000.00	$ 0.00	$ 0.00
☐	04/29/2020	EMS	AJD001	CC	Done	Done	05/22/2020	$ 500.00	$ 400.00	$ 0.00	$ 0.00
☐	04/28/2020	WBCOU	AJD001	CC	Done	Done	05/22/2020	$ 25.00	$ 25.00	$ 0.00	$ 0.00
☐	02/27/2020	ADP	HS1	CC	Done	Done	02/26/2020	$ 50.00	$ 50.00	$ 0.00	$ 0.00

|< < > >| 1 of 1   Selected Payer Balance: $ 35.00   Selected Client Balance: $ 15.00

Action *
Reprocess All Payers

Message *
Reprocess All Payers Example

Transaction Date *
05/31/2021   **CONTINUE WITH SELECTION**

- (a) Select the checkbox for each claim that should be Reprocessed or use Filters to refine the results.
- (b) Click in the Action drop-down and select the *Reprocess ALL Payers* option.
- (c) Enter a message for the job. The Message makes it easy to identify the job on the *Reprocessing History* and the *Reprocessing Errors* tabs.
- (d) The Transaction Date is used to determine the GL Posting Period and defaults to the current date. It may be edited. For the example, the Transaction Date was edited to be the same as the Service Date.
- (e) Select the now enabled blue *CONTINUE WITH SELECTION* button.
- (f) A *Reprocess All Payers* confirmation modal displays, select *REPROCESS* to continue.

Reprocess All Payers

Reverse and recreate charges for the 1 selected service?

CANCEL   **REPROCESS**

-

Review and Finalize the Reprocessing Job

Next, navigate to the Claims *Reprocessing History* tab.

CLAIMS MANAGEMENT	REPROCESSING HISTORY	REPROCESSING ERRORS

Start Date   **End Date**   **User**   × Preview

Date	Job Type	Job Status	Created By	Message	Services	Errors	
06/09/2021	Reprocess All Payers	Preview	heather.sherwood	Reprocess All Payers Example	1	0	**FINALIZE** ▾

- Review and correct any errors. Error details are found on the *Reprocessing Errors* tab.
- (g) When the job is error-free, select *FINALIZE* to complete the *Reprocess All Payers* process.

The Claim Details now display the following. Note the additional Modifiers with the now *ACTIVE* Charge for Payer 1.

Claim Details   ✕

Barnhill, Kelsey (000001)

Name	Policy Number	Priority	Notes
NOACORN	Kelsey's Policy	10	
CC	KB-CC-001	15	
SELF		99	

Birth Date: 12/01/2000
Phone: (603)731-1813
Address:
2 Farmview Ave
Center Conway, NH 03813

Mental Health Counseling   90866   05/31/2021   ⬤ Show Reprocessed Charges

NOACORN   🗇 NOTES & TASKS

Date	Amount	Reason	Last Billed	Authorization	Status	Procedure Code	Diagnosis
05/31/2021	$ 200.00	CHARGE CREATED			ACTIVE	90866 - TS, GT	F40.232
Balance:	$ 200.00						
Total Balance:	$ 200.00						

CC   🗇 NOTES & TASKS

Date	Amount	Reason	Last Billed	Authorization	Status	Procedure Code	Diagnosis
Total Balance:	$ 0.00						

SELF   🗇 NOTES & TASKS

Date	Amount	Reason	Last Billed	Authorization	Status	Procedure Code	Diagnosis
Total Balance:	$ 0.00						

───── Billing History ─────

NOACORN 06/04/2021
CC 06/04/2021
SELF 06/04/2021

If the *Show Reprocessed Charges* toggle is enabled, the original and reversing entries for each Payer are displayed.

Payer 1

NOACORN   🗇 NOTES & TASKS

Date	Amount	Reason	Last Billed	Authorization	Status	Procedure Code	Diagnosis
05/31/2021	$ 200.00	CHARGE CREATED	06/04/2021		DONE	90866	F40.232
06/01/2021	$ 100.00	PAYER PAYMENT					
06/01/2021	$ 85.00	BALANCE ZEROING CREDIT					
06/01/2021	$ 15.00	FEE ADJ					
05/31/2021	-$ 200.00	CHARGE CREATED			DONE	90866	
05/31/2021	-$ 100.00	PAYER PAYMENT					
05/31/2021	-$ 15.00	FEE ADJ					
05/31/2021	-$ 85.00	BALANCE ZEROING CREDIT					
05/31/2021	$ 200.00	CHARGE CREATED			ACTIVE	90866 - TS, GT	F40.232
Balance:	$ 200.00						
Total Balance:	$ 200.00						

Payer 2

CC   🗇 NOTES & TASKS

Date	Amount	Reason	Last Billed	Authorization	Status	Procedure Code	Diagnosis
06/01/2021	$ 200.00	CHARGE CREATED	06/04/2021		DONE	90866	F40.232
06/01/2021	$ 15.00	FEE ADJ					
06/01/2021	$ 100.00	PAID BY OTHER					
06/02/2021	$ 50.00	PAYER PAYMENT					
Balance:	$ 35.00						
05/31/2021	-$ 200.00	CHARGE CREATED			DONE	90866	
05/31/2021	-$ 50.00	PAYER PAYMENT					
05/31/2021	-$ 15.00	FEE ADJ					
05/31/2021	-$ 100.00	PAID BY OTHER					
Balance:	-$ 35.00						
Total Balance:	$ 0.00						

Payer 3

SELF							🗂 NOTES & TASKS
Date	Amount	Reason	Last Billed	Authorization	Status	Procedure Code	Diagnosis
05/31/2021	$ 15.00	CHARGE CREATED	06/04/2021		DONE	90866	
Balance:	$ 15.00						
05/31/2021	-$ 15.00	CHARGE CREATED			DONE	90866	
Balance:	-$ 15.00						
Total Balance:	$ 0.00						

Create Bills for the Payer 1 Reprocessed Charge

The now *Active* Charge for Payer 1 (NOACORN) can be included in a *Fiscal Overview > Unbilled Charges > Create Bills* job. Once a *Create Bills* job is processed and finalized, the Charge Status is updated to Outgoing. This step may not be required depending on your reasons for reprocessing. If there is no need to send a corrected bill to the Payer, skip to the *Applying the Reprocessed Remittance* section.

Apply the Reprocessed Remittance for Payer 1

Navigate to Remittances and find the original payment from the first Payer on the Remittances screen. Selecting *Reprocessed* in the Status filters helps refine the results.

Client	Batch ID	Payer	Status
× 000001 Barnhill, Kelsey ▼		Payer ▼	× Reprocessed ▼

Transaction Type	Start Date 📅	End Date 📅	Amount
Transaction Type ▼			

RA Number	Created By Staff ▼	☐ Display Only Records with Messages	SEARCH REMITTANCES

No recent imports

MARK (0) READY   MARK (0) NOT READY   DELETE (0)

☐	Status	Payer	Client	Amount		Service Date	Transaction D...	Allowed Amount	Matching Charge	Messages & N...
	Reprocessed	CC - Carroll County	000001 Barnhill, Kelsey	$ 50.00	P	05/31/2021	06/02/2021	$ 0.00		0
	Reprocessed	NOACORN - No Acorn 8...	000001 Barnhill, Kelsey	$ 100.00	P	05/31/2021	06/01/2021	$ 0.00		0 ➕

Select the remittance and search for the new Charge that was just created.

000001 Barnhill, Kelsey
Service Date: 05/31/2021 $ 100.00   NOACORN

VIEW CLAIM

Remittance Details

Transaction Type *
PAYER PAYMENT   ×   ▾

Transaction Date *
06/01/2021   📅

Remittance Amount *
$ 100.00

Remittance Date
06/01/2021   📅

RA Number

PCCN

Batch ID
Payer1

Allowed Amount

Patient Responsibility
$ 50.00   ☑ **Waterfall to next payer**

Recent Remittances

Ⓟ **000001 Barnhill, Kelsey**
Service Date: 05/31/2021
$ 100.00   NOACORN

Client & Service

Payer *
NOACORN - No Acorn 837 Payer   ×   ▾

Client
000001 Barnhill, Kelsey   ×   ▾

Service Date
05/31/2021   📅

◉ **Mental Health Counseling 90866 - TS, GT   05/31/2021**
  Staff HS1 Sherwood, Heather
  Amount $ 200.00   **Balance** $ 200.00   ACTIVE   VIEW CLAIM

⓪ Messages & Notes   Status * | Not Ready ▾ |

➕ SAVE AND ADD ANOTHER   🗑 DELETE   CANCEL   **SAVE**

- Change the Remittance Status to *Not Ready* and, at minimum, select the correct Charge.
- The example reprocessed Charge has *ACTIVE* status. If Bills were created, the status would be *OUTGOING.*
- Corrections can be made to the remittance. In this example, the Patient Responsibility Amount is updated to $50.00.

⓪ Messages & Notes   Status * | Ready ▾ |

➕ SAVE AND ADD ANOTHER   🗑 DELETE   CANCEL   **SAVE**

- Mark the Remittance as Ready.
- Select *SAVE.*

Next, navigate to the Vantage Point and process Remittances.

Unprocessed Remittances » Process Transactions   ✕

CREATE   HISTORY   ERRORS

Payer
✕ NOACORN - No Acorn 837 Payer   ✕ ▾ | **Batch ID** | **Start Date** 📅 | **End Date** 📅 | **SEARCH** |

☐	Date	Status	Client	Amount	Payer	Charge	Transaction Type	Batch ID
☐	06/01/2021	Ready	000001 Barnhill, Kelsey	100	NOACORN - No Acorn 8...	05/31/2021 90866 $ 200.00	PAYER PAYMENT	Payer1

|◁ ◁ ▷ ▷| 1 of 1

Message
Process the applied Reprocessed Remittance| **CREATE REMITTANCE JOB WITH RESULTS**

Navigate to the *Unprocessed Remittances > Process Transactions > History* tab to review and *FINALIZE* the job.

When the Remittance job is finalized, the Waterfall Create Charges job is in *PREVIEW* Status in the *Unprocessed Services > Create Charges > History* tab for Payer 2 (CC) and Self Pay (SELF).

- Review the job details and correct any errors if necessary.
- Then Finalize the Create Charges job.

Create Bills for the Waterfall Charges to Payer 2 and SelfPay

The now *ACTIVE* Waterfall Charges are available to include in a *Fiscal Overview > Unbilled Charges > Create Bills* job for Payer 2 (CC) and SELF PAY. For this example, bills were created for both Payers. Returning to the Claims Management screen,

- The Active/Last Payer is now CC.
- The Charge Status is Outgoing.
- The Payer Balance (for Payer CC) is $50.00.
- The Client Balance (for Payer SELF) is $50.00.

Apply the Reprocessed Remittance for Payer 2

Navigate to Remittances and find the copy of the original payment from the second Payer. Again, selecting *Reprocessed* in the Status filters helps refine the results.

Client	**Batch ID**	**Payer**	**Status**
Client ▾		Payer ▾	× Reprocessed × ▾
Transaction Type	**Start Date**	**End Date**	**Amount**
Transaction Type ▾	📅	📅	
RA Number	**Created By Staff**	☐ Display Only Records with Messages	**SEARCH REMITTANCES**
	Created By Staff ▾		

No recent imports

MARK (0) READY   MARK (0) NOT READY   DELETE (0)

☐	Status	Payer	Client	Amount	Service Date	Transaction Da...	Allowed Amount	Matching Charge	Messages & N...
	Reprocessed	CC, Carroll County	000001 Barnhill, Kelsey	$ 50.00	ⓟ 05/31/2021	06/02/2021	$ 0.00		0

Just as before, the Remittance Status was updated to allow selection of the newly processed Charge; for this payment, no changes were made. The remittance was marked as *Ready* and processed and finalized in *Fiscal Overview > Unprocessed Remittances.*

Return to the Claims Management menu.

000001 Barnhill, Kelsey								Payer Balance: $ 0.00	Client Balance: $ 50.00
☐	Date	Service	Staff	Active/Last P...	Charge Status	Service Status	Last Billed	Charge	Paid	Payer Balance	Client Balance
☐	05/31/2021	MHC	HS1	CC	Done	Charge Created	06/09/2021	$ 200.00	$ 50.00	$ 0.00	$ 50.00

- The Charge Status is now set to *DONE.*
- The Payer Balance is now $0.00.

Selecting the row to view the Claim Details displays the following.

Claim Details

NOACORN   📋 NOTES & TASKS

Date	Amount	Reason	Last Billed	Authorization	Status	Procedure Code	Diagnosis
05/31/2021	$ 200.00	CHARGE CREATED			DONE	90866 - TS, GT	F40.232
06/01/2021	$ 100.00	PAYER PAYMENT					
06/01/2021	$ 50.00	FEE ADJ					
06/01/2021	$ 50.00	BALANCE ZEROING CREDIT					
Total Balance:	**$ 0.00**						

CC   📋 NOTES & TASKS

Date	Amount	Reason	Last Billed	Authorization	Status	Procedure Code	Diagnosis
06/01/2021	$ 200.00	CHARGE CREATED	06/09/2021		DONE	90866	F40.232
06/01/2021	$ 50.00	FEE ADJ					
06/01/2021	$ 100.00	PAID BY OTHER					
06/02/2021	$ 50.00	PAYER PAYMENT					
Total Balance:	**$ 0.00**						

SELF   📋 NOTES & TASKS

Date	Amount	Reason	Last Billed	Authorization	Status	Procedure Code	Diagnosis
05/31/2021	$ 50.00	CHARGE CREATED	06/09/2021		OUTGOING	90866 - TS, GT	
Balance:	**$ 50.00**						
Total Balance:	**$ 50.00**						

─── Billing History ───

NOACORN 06/04/2021
CC 06/04/2021
CC 06/09/2021
SELF 06/04/2021
SELF 06/09/2021

Note in the *Billing History,*

- Payer 1 – NOACORN only has a single billing entry because a *Create Bills* job was not processed for Payer 1 after the reprocessing. The copy Remittance was applied to the *ACTIVE* Charge.
- Payer 2 – CC and Payer 3 – SELF has two entries because a *Create Bills* job was processed for each after the Waterfall job was reprocessed. The copy Remittance for Payer 2 was applied to the *OUTGOING* Charge.

Enabling the *Show Reprocessed Transactions* toggle displays the original and reversing transaction in addition to the current transactions.

Claim Details

Barnhill, Kelsey (000001)

Birth Date: 12/01/2000
Phone: (603)731-1813
Address:
2 Farmview Ave
Center Conway, NH 03813

Name	Policy Number	Priority	Notes
NOACORN	Kelsey's Policy	10	
CC	KB-CC-001	15	
SELF		99	

Mental Health Counseling   90866   05/31/2021

⬤ Show Reprocessed Charges

NOACORN   🗋 NOTES & TASKS

Date	Amount	Reason	Last Billed	Authorization	Status	Procedure Code	Diagnosis
05/31/2021	$ 200.00	CHARGE CREATED	06/04/2021		DONE	90866	F40.232
06/01/2021	$ 100.00	PAYER PAYMENT					
06/01/2021	$ 85.00	BALANCE ZEROING CREDIT					
06/01/2021	$ 15.00	FEE ADJ					
05/31/2021	-$ 200.00	CHARGE CREATED			DONE	90866	
05/31/2021	-$ 100.00	PAYER PAYMENT					
05/31/2021	-$ 15.00	FEE ADJ					
05/31/2021	-$ 85.00	BALANCE ZEROING CREDIT					
05/31/2021	$ 200.00	CHARGE CREATED			DONE	90866 - TS, GT	F40.232
06/01/2021	$ 100.00	PAYER PAYMENT					
06/01/2021	$ 50.00	FEE ADJ					
06/01/2021	$ 50.00	BALANCE ZEROING CREDIT					

Total Balance: $ 0.00

CC   🗋 NOTES & TASKS

Date	Amount	Reason	Last Billed	Authorization	Status	Procedure Code	Diagnosis
06/01/2021	$ 200.00	CHARGE CREATED	06/04/2021		DONE	90866	F40.232
06/01/2021	$ 15.00	FEE ADJ					
06/01/2021	$ 100.00	PAID BY OTHER					
06/02/2021	$ 50.00	PAYER PAYMENT					
Balance:	**$ 35.00**						
06/01/2021	$ 200.00	CHARGE CREATED	06/09/2021		DONE	90866	F40.232
06/01/2021	$ 50.00	FEE ADJ					
06/01/2021	$ 100.00	PAID BY OTHER					
06/02/2021	$ 50.00	PAYER PAYMENT					
05/31/2021	-$ 200.00	CHARGE CREATED			DONE	90866	
05/31/2021	-$ 50.00	PAYER PAYMENT					
05/31/2021	-$ 15.00	FEE ADJ					
05/31/2021	-$ 100.00	PAID BY OTHER					
Balance:	**-$ 35.00**						

Total Balance: $ 0.00

SELF   🗋 NOTES & TASKS

Date	Amount	Reason	Last Billed	Authorization	Status	Procedure Code	Diagnosis
05/31/2021	$ 15.00	CHARGE CREATED	06/04/2021		DONE	90866	
Balance:	**$ 15.00**						
05/31/2021	$ 50.00	CHARGE CREATED	06/09/2021		OUTGOING	90866 - TS, GT	
Balance:	**$ 50.00**						
05/31/2021	-$ 15.00	CHARGE CREATED			DONE	90866	
Balance:	**-$ 15.00**						

Total Balance: $ 50.00

— Billing History —

NOACORN 06/04/2021
CC 06/04/2021
CC 06/09/2021
SELF 06/04/2021
SELF 06/09/2021

REVERSE SERVICE TRANSACTIONS

This Action voids all charges for the selected claim for all payers, including remittances, and sets the Service Status back to *Ready*. Use this option when corrections to the Service (like including a Supervisor or correcting the selected diagnosis) are required or reprocessing a bundle to ensure all Services provided during the bundle period are included in the *Create Charges* job. When this type of reprocessing Action is selected, the user is responsible for including these reprocessed Services in a new *Fiscal Overview > Create Charges* job. A copy Remittance (Status = Reprocessed) is created for any payments posted to the reprocessed Charge(s).

Example

This Bundled Claim was denied due to an invalid diagnosis. The following steps work through reversing the bundled Charge to Ready services so the diagnosis can be corrected, and the services included in a new *Create Charges* job.

Claim Details

Beach, Sandy, Jr. (000041)

Birth Date: 10/17/1965
SSN: 001-23-4567
Phone: (603)447-8600
Address:
1729 Village Rd
Silver Lake, NH 03875

Name	Policy Number	Priority	Notes
MDCD	P123	2	

Bundled Counseling   99292   06/01/2021

Show Reprocessed Charges

MDCD

Date	Amount	Reason	Last Billed	Authorization	Status	Procedure Code	Diagnosis
06/01/2021	$ 1,000.00	CHARGE CREATED	06/08/2021		DONE	99292	R69
06/10/2021	$ 0.00	Denial-Diagnosis Issue					
06/10/2021	$ 1,000.00	BALANCE ZEROING CREDIT					
Total Balance:	**$ 0.00**						

Billing History

MDCD 06/08/2021

Create the Reprocessing Job

CLAIMS MANAGEMENT   REPROCESSING HISTORY   REPROCESSING ERRORS

Client	Staff	Service Start	Service End	Billing Start	Billing End
000041 Beach, Sandy, Jr.	Start typing to search...	06/01/2021			

Payer	Payer Category	Defined Filter	Charge Status	
Start typing to search...	Start typing to search...	Start typing to search...	Start typing to search...	**SEARCH**

000041 Beach, Sandy, Jr.   Payer Balance: $ 0.00   Client Balance: $ 0.00

	Date	Service	Staff		Active/Last Pa...	Charge Status	Service Status	Last Billed	Charge	Paid	Payer Balance	Client Balance
☐	06/01/2021 (a)	BUNCOUN	CM123		MDCD	Done	Done	06/08/2021	$ 1,000.00	$ 0.00	$ 0.00	$ 0.00

|< < > >| 1 of 1   Total Payer Balance: $ 0.00 Total Client Balance: $ 0.00

Action * (b)   **Message * **   **Transaction Date * (e)**

Reverse Service Transactions   Dx Denials (c)   06/08/2021 (d) **CONTINUE WITH RESULTS**

- (a) Select the checkbox for each claim that should be Reversed or use Filters to refine the results.
- (b) Click in the Action drop-down and select the *Reverse Service Transactions* option.
- (c) Enter a message for the job. The Message makes it easy to identify the job on the *Reprocessing History* and the *Reprocessing Errors* tabs.
- (d) The Transaction Date is used to determine the GL Posting Period and defaults to the current date. It may be edited.

- (e) Select the now enabled blue *CONTINUE WITH RESULTS* button.
- (f) A *Reverse Service Transactions* confirmation modal displays; select *REVERSE* to continue.

Reverse Service Transactions ✕

Reverse charges for the 1 selected service?

f   CANCEL   **REVERSE**
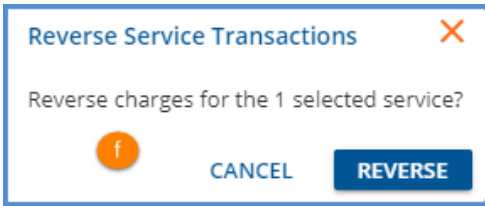
Review and Finalize the Reprocessing Job

Next, navigate to the Claim *Reprocessing History* tab.

CLAIMS MANAGEMENT	REPROCESSING HISTORY	REPROCESSING ERRORS

Start Date

06/08/2021   📅   **End Date**   📅   **User** | Status ▾ |

Date	Job Type	Job Status	Created By	Message	Services	Errors	g
06/08/2021	Reverse Service Transactions	Preview	heather.sherwood	Dx Denials	1	0	**FINALIZE** ▾

                                   Details

Service Date	Client	Duration/Units	Last Active Payer	Last Active Charge	Current Active Payer	Current Active Charge
06/01/2021	000041 Beach, Sandy, Jr.	30 min	MDCD	$ 1,000.00		$ 0.00

- Review and correct any errors. Error details are found on the *Reprocessing Errors* tab.
- (g) When the job is error-free, select *FINALIZE* to complete the *Reverse Service Transactions* process.

The following transactions display when the *Show Reprocessed Charges* toggle is enabled in Claim Details.

Claim Details ✕

Beach, Sandy, Jr. (000041)

Birth Date: 10/17/1965
SSN: 001-23-4567
Phone: (603)447-8600
Address:
1729 Village Rd
Silver Lake, NH 03875

Name	Policy Number	Priority	Notes
MDCD	P123	2	

Psychotherapy 15-30 minutes   90832   06/01/2021   🔵 Show Reprocessed Charges

MDCD   📋 NOTES & TASKS

Date	Amount	Reason	Last Billed	Authorization	Status	Procedure Code	Diagnosis
06/01/2021	$ 1,000.00	CHARGE CREATED	06/08/2021		DONE	99292	R69
06/10/2021	$ 0.00	Denial-Diagnosis Issue					
06/10/2021	$ 1,000.00	BALANCE ZEROING CREDIT					
06/08/2021	-$ 1,000.00	CHARGE CREATED			DONE	99292	
06/08/2021	$ 0.00	Denial-Diagnosis Issue					
06/08/2021	-$ 1,000.00	BALANCE ZEROING CREDIT					
Total Balance:	$ 0.00						

            Billing History

    MDCD 06/08/2021

Review and Correct the Ready Services

Status	Date	Client	Staff	Service Code	Program	
Ready	06/08/2021 9:00 AM 30 min	000041 Beach, Sandy, Jr.	CM123	PSY30	MH	📄
Ready	06/04/2021 9:00 AM 30 min	000041 Beach, Sandy, Jr.	CM123	PSY30	MH	📄
Ready	06/01/2021 9:00 AM 30 min	000041 Beach, Sandy, Jr.	CM123	PSY30	MH	📄

Navigate to the Services main menu item to view and correct the now *Ready* Services. For example, the invalid diagnosis on the 6/1 Service must be updated.

Diagnosis ⓘ

Client Diagnosis *

F10.950: Alcohol use, unspecified with alcohol-induced psychotic disorder with delusions

Principal

+ CLIENT DIAGNOSIS

➕ ADD OTHER DIAGNOSIS

📄 ADD PROGRESS NOTE

Status Not Ready

🗎 SAVE AND NEW SERVICE   🗑 DELETE   ⓘ   CANCEL   SAVE

Once corrections are made, select *SAVE* to record the changes. These Services are ready for processing following your typical workflow for marking as *READY* through the *Create Bills* process.

OTHER CONSIDERATIONS

Reprocessing Charges Previously Sent to a Payer

During the 837 creation process in *Fiscal Overview > Unbilled Charges > Create Bills*, EchoVantage generates a unique ID for the billed Charge (dbo.Charge.Id837). This unique ID combined with the Client's Code is used in the *Loop 2300, CLM01* data element or the *Loop 2400, REF*6R* data element of the 837. The benefit of this method is that the unique ID links back to the original Charge because 837 specifications state that the Payer must return an 835 with a *CLP01* or *REF*6R* that is identical to the *CLM01* or *REF*6R* on the 837. However, reprocessing charges *after* they are billed archives the original Charge and creates a new charge with a new ID. The result is that the Payer could send back the original Charge ID in the CLP, which does not automatically match. This same scenario occurs when a Clearing House submits bills on behalf of the agency. The Clearing House often submits 837 files with their unique ID convention.

In EchoVantage versions 3.22 and higher, both original and reprocessed charges are checked when importing an 835 file. If an import references the original Id837 of a reprocessed charge, it does not match the *Active* Charge. The import process then compares *DONE* charges. If a match is found, the payment is linked to the related *Active* Charge, and the following Message is logged *"Original Charge was reprocessed. Remittance has been attached to latest Charge."*