

WI Custom Billing Release Notes v2.0.16

Requires EchoVantage Version 3.25 or higher

DOCUMENT HISTORY

Date	Description	Author	Version
09/14/2020	Initial Release	Heather Sherwood	1.0.34.RELEASE
11/05/2020	Updated how held services in the Acorn are handled by oak. FW-11068	Heather Sherwood	1.0.35.RELEASE
12/09/2020	Updated the Acorn install/upgrade process to update existing forms rather than delete and reinsert. FW-11341	Heather Sherwood	1.0.36.RELEASE
12/22/2020	Removed an errant space from after the Procedure Modifier in the 837 file. FW-11559	Heather Sherwood	1.0.39.RELEASE
06/09/2021	Updated Acorn to successfully create charges even when staff has more than one credential that is not included in signature. EV-712	Heather Sherwood	1.0.41.RELEASE
07/27/2022	Ensured custom billing acorn information displays in the Help > About menu EV-3814. Changed how Referring Provider is reported for Services that do no match a row in the Referring Provider Mapping form. SOW-164	Heather Sherwood	2.0.16.RELEASE

Overview

The WI Custom Billing Acorn addresses state-specific billing and bundling requirements. Bundling occurs daily or monthly (calendar month), by credential level grouping, and POS (Location). The monthly bundle end date on the 837P is the last day of the month, even if there is no service on that date. The 837P also uses state-specific rules for *Referring Provider* reporting.

Installing the Acorn

The *install-wi-bundling-2.0.16.sql* script updates the *WI Bundling Customization* and the *WI 837P Customization* records in the *dbo.AcornRegistrations* table to version 2.0.16. SaaS hosted customers should send a request via the Support portal to authorize the install or update.

After the Acorn is installed or upgraded, the latest version information displays in the *Help > About* menu in EchoVantage.

About EchoVantage

<p>Versions</p> <p>EchoVantage - V3.39-14557 Next Generation EHR for Behavioral Healthcare</p> <p>VHR - V12 Visual Health Record</p>	<p>ACORNs</p> <p>PPS - V2.0.96.RELEASE Support for Wisconsin PPS</p> <div style="border: 2px solid red; padding: 5px; margin-top: 10px;"> <p>WICustomizations - V2.0.16.RELEASE WI Billing Customizations</p> </div>
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Configuring the Application

Payers Configuration

Payers > Processing

In *Configuration > Services/Payers > Payers > Processing*, select the WI-Bundling Acorn from the *Acorns* drop-down list for the appropriate Payer. This selection triggers the charge creation process to look for special bundles when creating charges for this Payer. The *Allow Service Bundling* checkbox must also be selected.

Payers > Billing Methods

Configure or edit the 837 Professional for this Payer to have the *WI 837P Customization Acorn* is selected. This configuration triggers the billing process to use the Referring Provider reporting logic AND to report the last day of the month for monthly bundles.

Also ensure in the Claims and Services section that:

- *Report in the Rendering Loop* is selected for the “Supervisor Reporting” field.

The screenshot shows the 'Claims and Services' configuration page. It includes several dropdown menus: 'Adjudication Level' (Claim Level), 'Subsequent Payers Reporting' (Include all subsequent payers), 'Authorization Level' (Service Level), and 'Supervisor Reporting' (Report in the Rendering Loop). The 'Supervisor Reporting' dropdown is highlighted with a red box. Below these is the 'Claims per Subscriber Loop' field set to 100.

- And that Staff Reporting is not selected or Defined Filters are in use that exclude the WI special bundles.

The screenshot shows the 'Report Staff' configuration section. It includes a checkbox for 'Report Staff (Loop 2310B)' which is unchecked. Below it is a 'Defined Filter' dropdown menu with the text 'Start typing to search...'. There are also checkboxes for 'Report Staff Taxonomy (Loop 2310B, PRV)' and 'Report Service Facility Location (Loop 2310C)', both of which are unchecked.

Payers > POS Mappings

The Acorn uses the 2nd Service Component, Location. This component may be renamed but should not be repurposed for anything other than Location.

The screenshot shows the 'POS Mappings' tab in the system. It includes a toggle for 'Use Defined Filters For Mapping' which is turned off. Below is a table for mapping 'Place of Service (Location Component)' to 'Payer Place of Service'. The table has two columns: 'Place of Service (Location Component)' and 'Payer Place of Service'. The first row shows 'COMM: Community Center' mapped to 'B3: Community Mental Health Center'. There are '+ ADD', 'CANCEL', and 'SAVE' buttons at the bottom.

Review the Payer POS Mappings tab. These mappings are evaluated during Service Processing. If two POS (Location Components) are mapped to the same Payer Place of Service, those are considered the same location when running a Create Charges job.

- Payer POS Mappings override the Service POS (Location) component.

- The Location component may be mapped to a Payer Place of Service.
- Or Defined Filters may be used to map to a Payer Place of Service.

Staff Credential Configuration

Review the Staff Credentials Defined List in *Configuration > Setup > Defined Lists...* This list stores the type assigned to each Staff Credential. Only credentials with Type=D are considered.

Credential *	Description	Type *
AA	Associate of Arts	D
AAS	Ass. in App. Sci./ Accounting	D
ADN	Associates Degree in Nursing	D
APNP	ADV Pr. Nurse Practitioner	D

Review Staff Credentials in *Configuration > Staff/Users > Staff > Credentials.*

Credential	Number	Issued By	Verified Date	Verified By	Start Date	End Date	Expiration Date	Include in Signature
DD Physician	234250443	Local	07/25/2023	Dmsward	07/12/2020	07/12/2024	07/18/2024	No

- Only Staff Credentials that are active and have the *Include in Signature* field set to *No* are considered.
- A credential is considered active when the Expiration Date column is *NULL* or if a date is present, that date is later than the current date.

WI Bundling Service Definition Configuration

Create or Review the bundles for use in WI bundling, with close attention to:

- Billing and Reporting Codes
- Frequency (Daily, Monthly, or Weekly)

- Bundled Service Definition
 - Min. Services for the child Service Definition
 - *When Service Does Not Bundle* field – the Acorn uses this to determine what to do with a Service that does not meet the bundle requirements.
 - *Put On Hold*
 - *Release For Individual Processing*
 - Note that the *Bundle for Same Staff Only* setting is not considered by the WI Acorn.
- Review the default Rates for the bundled and individual Service Definitions. Define Payer specific rates if needed.

WI Bundling Custom Forms Configuration

In *Configuration > Setup > Forms*, add the *WStaffMapping* and the *WI_BNDL_Service_Definition_Mapping* forms to an existing Category or create a new Category. A different *Display Name* may be assigned if desired.

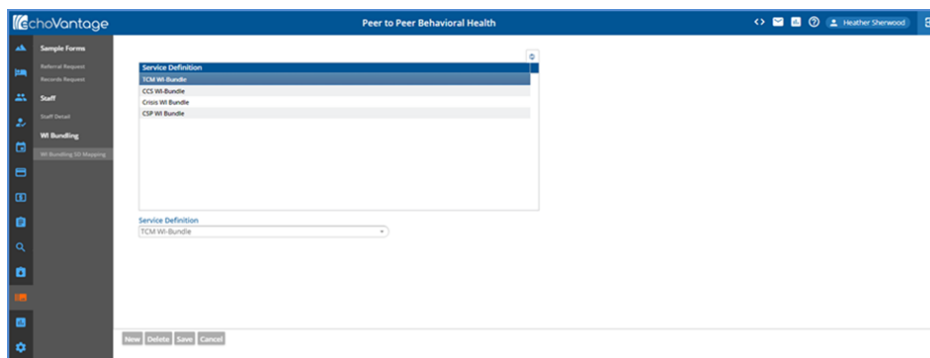


- The Acorn installs these forms tagged with a Form Location of Menu.
- Remember to grant access to the new Category and Form in *Configuration > Staff/Users > User Groups > MENU OPTIONS*
- More detailed information on [Forms configuration](#) is found in the webhelp.
- Then navigate to the *Forms* main menu option.
 - Select the *WI Staff Mapping* form.



- Click on the green plus “+” to add a record. All fields are required.
- This defines the Staff reported as the Referring Provider in Loop 2310A when the Service matches a the Payer and Program combination.
- If no row in the custom table matches the Payer and/or Program of the service,

- The Referring Provider is reported from the client’s matching Enrollment.
- The client’s matching Enrollment is the one where:
 - The Enrollment Start and End Dates include the Service Date.
 - The Program matches the Service Program.
- If there are multiple Referring Providers listed, the highest priority (the one with the lowest priority number assigned) is reported.
- If there is no matching Enrollment, or the matching Enrollment does not have a Referring Provider, no Referring Provider is reported.
- The Staff field is validated to the Staff entered in EchoVantage.
- Select the WI Bundling Service Definition Mapping form.



- Use the drop-down list to identify the Bundled Service Definitions that should use the WI Bundling Rules.
- Note that only *bundled* Service Definitions can be mapped on this form.

The application configuration is complete. Enter Services and mark as Ready using the typical workflow.

Service Processing Using the Acorn

The *Create Charges* process in *Vantage Point > Fiscal Overview > Unprocessed Services* remains the same. The Acorn setting on the Payer Processing tab automatically applies the special bundling rules when creating charges for that Payer.

- The mapped Daily Bundles are bundled based on Staff Credential Grouping and Place of Service.
- Only active Staff Credential with the Signature set to “NO” are considered.
- The Payer Place of Service (POS) Mapping, by POS Component or Defined Filter, takes precedence over the Service POS component value.
- If the Service POS component is mapped to a POS of “Office” and another Service on the same day (or in the same month, depending on the bundle configuration) has a POS

component of “Office,” these are considered the same and meet the same POS requirement for bundling.

ServiceDate	Client	Duration	Payer	Procedure Code	Units	Charge Amount	Balance
07/15/2020	00002 Dena	60 mins	PHC	D884	2	\$ 400.00	\$ 400.00
07/15/2020	00002 Dena	60 mins	PHC	8888	6	\$ 120.00	\$ 120.00
07/15/2020	00002 Dena	60 mins	PHC	8888	6	\$ 60.00	\$ 60.00
07/15/2020	00002 Dena	60 mins	PHC	D884	2	\$ 400.00	\$ 400.00
07/16/2020	00000 Degan	60 mins	PHC	H207	12	\$ 1,200.00	\$ 1,200.00

- Click on a job row to review the bundle and charge details when the job *Status* is Preview.
- Take corrective action on any Errors and *Retry* the job as needed. *Finalize* the create charges job when the review is complete.

Creating an 837P Using the Acorn

The *Create Bills* process in *Vantage Point > Fiscal Overview > Unbilled Charges* also remains unchanged. The *WI 837P Customization* selected in the Acorns drop-down list on the 837P Configuration for a Payer applies the billing customizations when processing a Create Bills job for that Payer. There are two different 837P customizations 1) the date reported for bundled monthly Services and 2) Referring Provider reporting.

Date Reporting

A Daily bundle reports the date Services were provided. The date reported in a Monthly bundle, however, is the last day of the month, even if no Services were provided on that date.

Referring Provider Reporting

When a *Create Bills* job is run in *Fiscal Overview > Unbilled Charges* for a Payer that has the *WI 837P Customization* Acorn configured, the Payer and Service combination is compared to the records in the WI Staff Mapping form. If a match is found, the Referring Provider Staff name for that row is reported in Loop 2310A.

If no row in the custom table matches the Payer and/or Program of the service,

- The Referring Provider is reported from the client’s matching Enrollment.
- The client’s matching Enrollment is the one where:
 - The Enrollment Start and End Dates include the Service Date.
 - The Program matches the Service Program.
- If there are multiple Referring Providers listed, the highest priority (the one with the lowest priority number assigned) is reported.
- If there is no matching Enrollment, or the matching Enrollment does not have a Referring Provider, no Referring Provider is reported.

Examples

Daily Bundling

In the following example, two Services are provided to the same Client by different Staff in different locations.

Start Date	End Date	Client	Staff	Supervisor	Defined Filter	Status	SEARCH	
07/01/2022		Select Client...	Select Staff...	Select Super...	Select Defin...	Ready On Hold		
Date	Time	Status	Client	Staff	Service Code	Program	POS	Service
07/01/2022	9:00 AM	Ready	000026 Naylor, Bobby Jo	H5123 Sherwood, Heather	WICCS	WIBNDL	11	WICCS
07/01/2022	2:00 PM	Ready	000026 Naylor, Bobby Jo	JA123 Austins, Jon	WICCS	WIBNDL	OFF	WICCS

- The Client's Primary Payer is WIPAY, and the Acorn is configured in the Processing and 837P Billing Methods tabs.
- The Staff satisfy the special bundling rules because each has an active Credential where
 - The type is 'D.'
 - And include in Signature is set to NO.
- The WIBNDL program is mapped to Referring Provider Benjamin Pierce.

Payer	Program	Staff
NH Medicaid	ADP	Joe Staffer
NH Medicaid	ANGMNG	Nevaeh Staff
WI Bundling Payer	WIBNDL	Benjamin Pierce

- The POS of *OFF* is mapped to Location 11 in the WIPAYER's POS Mappings.

Place of Service (Location Component)	Payer Place of Service	Start Date	End Date
OFF: Provider's Office	11: Office		
COMM: Community Center	53: Community Mental Health Center		
TELM: Telemedicine	10: Telehealth from a Patient's Home		

When the *Fiscal Overview > Unprocessed Services > Create Charges* job is processed, a single Daily Bundle is created. The job details show.

Service Date	Client	Duration/Un...	Payer	Procedure C...	Billed Units	Charge	Balance	Message
07/01/2022	000026 Nayl...	45 min	WIPAY	CCSDLY	2	\$ 700.00	\$ 700.00	
07/01/2022	000026 Nayl...	60 min				NO CHA...		

When the Create Bills function is processed for the Daily Bundle, the 837P reports the mapped Provider as the rendering Staff.

```

ISA*00*      *00*      *ZZ*08142020  *ZZ*01012020  *220725*1337*^*00501*000001372*0*T*:
GS*HC*08142020*01012020*20220725*1337*1372*X*005010X222A1
ST*837*1372*005010X222A1
BHT*0019*00*1372*20220725*1337*CH
[L.1000A]NM1*41*2
[L.1000A]PER*IC*WI BILLINGS*TE*6034478600
[L.1000B]NM1*40*2
[L.2000A]HL*1**20*1
[L.2000A!L.2010AA]NM1*85*2*ECHO MANAGEMENT*****XX*8888888888
[L.2000A!L.2010AA]N3*15 WASHINGTON ST
[L.2000A!L.2010AA]N4*CONWAY*NH*038181234
[L.2000A!L.2010AA]REF*EI*235135513
[L.2000B]HL*2*1*22*0
[L.2000B]SBR*P*18*GRP-123-BJM*****CI
[L.2000B!L.2010BA]NM1*IL*1*NAYLOR*BOBBY JO*MARIA***MI*BJM-123
[L.2000B!L.2010BA]N3*33 OAK RIDGE RD
[L.2000B!L.2010BA]N4*SILVER LAKE*NH*038754720
[L.2000B!L.2010BA]DMG*D8*19890613*F
[L.2000B!L.2010BB]NM1*PR*2*WI BUNDLING PAYER*****PI*08142020
[L.2000C!L.2300]CLM*000026-6644*700***11:B:1*Y*A*Y*Y*P
[L.2000C!L.2300]HI*ABK:F16122
[L.2000C!L.2300!L.2310A]NM1*DN*1*PIERCE*BENJAMIN*FRANKLIN***XX*4077407740
[L.2000C!L.2300!L.2400]LX*1
[L.2000C!L.2300!L.2400]SV1*HC:CCSDLY*700*UN*2***1
[L.2000C!L.2300!L.2400]DTP*472*D8*20220701
[L.2000C!L.2300!L.2400]REF*6R*000026-6644
SE*25*1372
GE*1*1372
IEA*1*000001372
  
```

Monthly Bundling

The 837P customization reports the last day of the month as the service date on the monthly bundle, even if no service occurred on that date. Only the 837P submission file has the last day of the month as the service date on the monthly bundle; the 837P Report Service and Claim details retain the original service date.

For example, the Claims Management screen for client Scott Jones shows the Monthly Bundle after the Create Charges job is finalized.

CLAIMS MANAGEMENT REPROCESSING HISTORY REPROCESSING ERRORS											
Client		Staff		Service Start		Service End		Billing End			
000050 Jones, Scott		Start typing to search...		07/01/2022							
Payer		Payer Category		Defined Filter		Charge Status		SEARCH			
Start typing to search...		Start typing to search...		Start typing to search...		Start typing to search...					
000050 Jones, Scott								Payer Balance: \$ 600.00 Client Balance: \$ 0.00			
<input type="checkbox"/>	Date	Service	Staff	Active/Last Pa...	Charge Status	Service Status	Last Billed	Charge	Paid	Payer Balance	Client Balance
<input type="checkbox"/>	07/05/2022	WIBTCM	HS123	WIPAY	Active	Charge Created		\$ 600.00	\$ 0.00	\$ 600.00	\$ 0.00

The Services that make up this bundle are dated 07/05, 07/12, and 07/19.

Start Date	End Date	Client	Staff	Supervisor	Defined Filter	Status			
07/01/2022		Select Client...	Select Staff...	Select Supervisor...	Select Defined Fil...	Ready On Hold	SEARCH		
Date	Time	Status	Client	Staff	Service Code	Program	POS	Service	
07/19/2022	9:00 AM	Ready	000050 Jones, Scott	HS123 Sherwood, Heather	WITCM	WIBNDL	11	WITCM	
07/12/2022	9:00 AM	Ready	000050 Jones, Scott	JA123 Austins, Jon	WITCM	WIBNDL	OFF	WITCM	
07/05/2022	10:00 AM	Ready	000050 Jones, Scott	HS123 Sherwood, Heather	WITCM	WIBNDL	11	WITCM	

- The Client's Primary Payer is WIPAY, and the Acorn is configured in the Processing and 837P Billing Methods tabs.
- The Staff satisfy the special bundling rules because each has an active Credential where
 - The type is 'D.'
 - And include in Signature is set to NO.
- Just like the example above, the Program is mapped to Referring Provider Benjamin Pierce.

The claim loop in the 837P for this bundle has a service date of 07/31/2022.

```

ISA*00*      *00*      *ZZ*08142020  *ZZ*01012020  *220725*1616*^*00501*000001379*0*T*:
GS*HC*08142020*01012020*20220725*1616*1379*X*005010X222A1
ST*837*1379*005010X222A1
BHT*0019*00*1379*20220725*1616*CH
[L.1000A]NM1*41*2
[L.1000A]PER*IC*WI BILLINGS*TE*6034478600
[L.1000B]NM1*40*2
[L.2000A]HL*1**20*1
[L.2000A!L.2010AA]NM1*85*2*MAINE PEER TO PEER BEHAVIORAL HEALTH*****XX*1234567890
[L.2000A!L.2010AA]N3*15 RIVER STREET
[L.2000A!L.2010AA]N4*WATERFORD*ME*041644164
[L.2000A!L.2010AA]REF*EI*020436798
[L.2000B]HL*2*1*22*0
[L.2000B]SBR*P*18*JONES GROUP*****CI
[L.2000B!L.2010BA]NM1*IL*1*JONES*SCOTT****MI*JONES POLICY
[L.2000B!L.2010BA]N3*123 DOWNTOWN
[L.2000B!L.2010BA]N4*RAPID CITY*MN*45851
[L.2000B!L.2010BA]DMG*D8*19690211*F
[L.2000B!L.2010BB]NM1*PR*2*WI BUNDLING PAYER*****PI*08142020
[L.2000C!L.2300]CLM*000050-6646*600***11:B:1*Y*A*Y*Y*P
[L.2000C!L.2300]HI*ABK:A38
[L.2000C!L.2300!L.2310A]NM1*DN*1*PIERCE*BENJAMIN*FRANKLIN***XX*4077407740
[L.2000C!L.2300!L.2400]LX*1
[L.2000C!L.2300!L.2400]SV1*HC:MNTHLY*600*UN*3***1
[L.2000C!L.2300!L.2400]DTP*472*D8*20220731
[L.2000C!L.2300!L.2400]REF*6R*000050-6646
SE*25*1379
GE*1*1379
IEA*1*000001379
  
```

Referring Provider Reporting

The two examples above demonstrate the reporting of a mapped referring provider. This example demonstrates reporting the referring provider from a matching enrollment, and then no referring provider reported. The client in this example has Medicaid (not NH Medicaid) as the Primary Payer and the following single Enrollment.

Episode: Standard PRE-ADMISSION 201

Start Date: 07/31/2019

Start Time: []

Location: []

Program: ANGMNG Anger Management

SubProgram: []

Admit Reason: MP Meets Policy

Level Of Care: O Outpatient

Primary Staff: Chani Mores CM123

EPSDT

Discharge

Projected Discharge Date: []

Discharge Date: []

Discharge Time: []

Discharge Reason: []

Referrals

First Name	Middle Name	Last Name	Suffix	NPI	Date	Role	Priority
Show all	Show all	Show all	Show all	Show all	Show all	Show all	Show all
Referrer		King		1111111111	06/30/2022	PCP	1

The provider mapping is the same as the examples above.

Referring Provider Mapping

Payer	Program	Staff
NH Medicaid	ADP	Joe Staffer
NH Medicaid	ANGMNG	Nevaeh Staff
WI Bundling Payer	WIBNDL	Benjamin Pierce

And the following two Services were provided. Note that one is for Program ADP, and one is for Program ANGMNG.

Date	Time	Status	Client	Staff	Service Code	Program	POS	Service
07/21/2022	10:30 AM	Ready	CANK0000 King, Edmond	HS123 Sherwood, Heather	ANGMNG	ANGMNG	OFF	ANGMNG
07/20/2022	10:00 AM	Ready	CANK0000 King, Edmond	HS123 Sherwood, Heather	ADP	ADP	11	ADP

Charges are created and then billed.

ADP - No Referring Provider	ANGMNG - Referring Provider from Enrollment
<pre>[L.2000B!L.2010BB]NM1*PR*2*MEDICAID****PI*MDCD [L.2000C!L.2300]CLM*CANK0000-6650*200***99:B:1*Y*C*N*Y*P [L.2000C!L.2300]HI*ABK:E7431 [L.2000C!L.2300!L.2320]SBR*S*18*KING'S GROUP*****CI [L.2000C!L.2300!L.2320]O****Y*P**Y [L.2000C!L.2300!L.2320!L.2330A]NM1*IL*1*KING*EDMOND*S***MI*KING'S POLICY [L.2000C!L.2300!L.2320!L.2330A]N3*36 BUBBLEGUM LANE [L.2000C!L.2300!L.2320!L.2330A]N4*SWEETWATER*FL*33636 [L.2000C!L.2300!L.2320!L.2330B]NM1*PR*2*WI BUNDLING PAYER*****PI*08142020 [L.2000C!L.2300!L.2400]LX*1 [L.2000C!L.2300!L.2400]SV1*HC:99408*200*UN*4***1 [L.2000C!L.2300!L.2400]DTP*472*D8*20220720 [L.2000C!L.2300!L.2400]REF*6R*CANK0000-6650</pre>	<pre>[L.2000B!L.2010BB]NM1*PR*2*MEDICAID****PI*MDCD [L.2000C!L.2300]CLM*CANK0000-6651*50***11:B:1*Y*C*N*Y*P [L.2000C!L.2300]HI*ABK:E7431 [L.2000C!L.2300!L.2310A]NM1*DN*1*KING*REFERRER***XX*1111111111 [L.2000C!L.2300!L.2320]SBR*S*18*KING'S GROUP*****CI [L.2000C!L.2300!L.2320]O****Y*P**Y [L.2000C!L.2300!L.2320!L.2330A]NM1*IL*1*KING*EDMOND*S***MI*KING'S POLICY [L.2000C!L.2300!L.2320!L.2330A]N3*36 BUBBLEGUM LANE [L.2000C!L.2300!L.2320!L.2330A]N4*SWEETWATER*FL*33636 [L.2000C!L.2300!L.2320!L.2330B]NM1*PR*2*WI BUNDLING PAYER*****PI*08142020 [L.2000C!L.2300!L.2400]LX*1 [L.2000C!L.2300!L.2400]SV1*HC:99382*50*UN*10***1 [L.2000C!L.2300!L.2400]DTP*472*D8*20220721 [L.2000C!L.2300!L.2400]REF*6R*CANK0000-6651</pre>

- The 7/20 ADP claim has no referring provider because there is no match in the Mapping form or in the client’s Enrollments.
- The 7/21 ANGMNG claim has *Referrer King* for the Referring Provider because this is the only Referrer from the matching Enrollment.

Updates

Ticket Number	Description
FW-11068	Updates were made to the processing service, oak, to check for held services when the Acorn does not return a bundle. As a result, updates were made to the WI Bundling Billing Acorn to not create a bundle when the root Service is placed on hold.
FW-11341	Updated the Acorn upgrade process to update existing forms rather than deleting and reinserting them.

Bug Fixes

Ticket Number	Case Number	Description
FW-11559		An issue was found where a space in the Service Loop after the Procedure Modifier was causing the 837 file to error. The issue was addressed and now the 837 file creates correctly.
EV-712	2566	A bug was fixed where the Acorn job failed when a staff had multiple degrees with Include in Signature set to “No”. Now, staff with multiple credentials do not cause the job to fail.
EV-3814		Updated the Acorn to ensure the WI Custom Billing information displays in the <i>Help > About</i> menu.