

DOCUMENT HISTORY

OK CUSTOM BILLING RELEASE NOTES

OK CUSTOM BILLING - VERSION 2.0.47.RELEASE

REQUIRES ECHOVANTAGE VERSION 3.39 OR HIGHER

Date	Description	Author	Version
02/03/2022	Initial Release	Heather Sherwood	2.0.33.RELEASE
06/28/2022	Updated 837 file to remove upper level information when there are no claims or subscribers EV-4224	Heather Sherwood	2.0.37.RELEASE
06/30/2022	Updated 837 file to correct the claim amount when service is removed due to missing contract EV-4281	Heather Sherwood	2.0.39.RELEASE
07/06/2022	Updated the mapping form and Acorn to accommodate Contract Code Start and End Dates per OK changes effective 07/01/2022 EV-4309	Heather Sherwood	2.0.41.RELEASE
08/26/2022	Updated Acorn to not error when the Staff's BZIP credential value is NULL <u>EV-4764</u>	Heather Sherwood	2.0.43.RELEASE
03/10/2023	The most recently created Enrollment is now	Heather Sherwood	2.0.47.RELEASE

OVERVIEW

The OK Custom Billing Acorn includes 837P changes to meet state billing requirements and report assessment data. The customizations include the following.

- Excluding a Service in the 837P if a charge was created for a prior payer
- Reporting the OKCODE and Rendering Staff Zip+4 in Loop 2300 NTE

selected when the Contract Source is mapped based on Enrollment (instead of Location) for

the phone/telehealth services.

found for Telehealth/Phone.

EV-6155

Removed a bullet point listed in error indicating that Acorn defaults to the Service Location when a matching Enrollment is not

- Reporting additional Rendering Staff on the same claim in Loop 2400 NTE
- Reporting the Contract Source in the HCP segment as
 - O HCP01 = '10' (Other)
 - o HCP02 = Charge Amount
 - HCP04 is reported based OK Contract Source Form mapping





INSTALLING THE ACORN

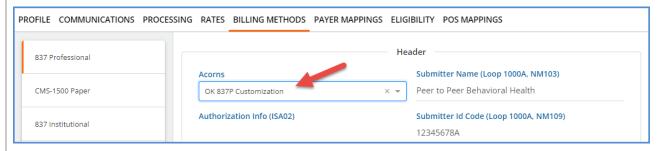
The *install-ok-custom-billing-2.0.47.RELEASE* script inserts one Acorn Registration record: *OK 837P Customization* in the AcornRegistrations table. After installation is complete, the Acorn version displays in the Help > About page under the ACORNs section. In addition, the Acorn install adds a custom form and table, *OKContractSourceForm* and *dbo.OKCustomContractSources*. The form is accessible from the Forms menu and is used to map Program and Location component values to Contract Source Codes for reporting in the HCP segment of the 837P.

After the Acorn is installed, the custom data population script is run to populate the OKCustomContractSources table with the Location, Program, Activity, Contract Source, and SQE mapping values.

CONFIGURING THE APPLICATION

Select the Acorn for the Applicable Payers

Navigate to *Configuration > Services/Payers > Payers > Billing Methods > 837 Professional*. Then select *OK 837P Customization* in the Acorns drop-down listing, and remember to select *SAVE* to record the changes. The Acorn must be defined on the Payer's 837 Professional Billing Method to report Rendering Staff and Contract Source Code correctly.



Configure the Custom Mapping Form

The Acorn installs the *OK Contract Source* form with a *MENU* Form Location making it ready to add to a new or existing Category to the *Forms* menu in *Configuration > Setup > Forms*. The example below shows the form added to a newly created *OK Custom Billing* Category.

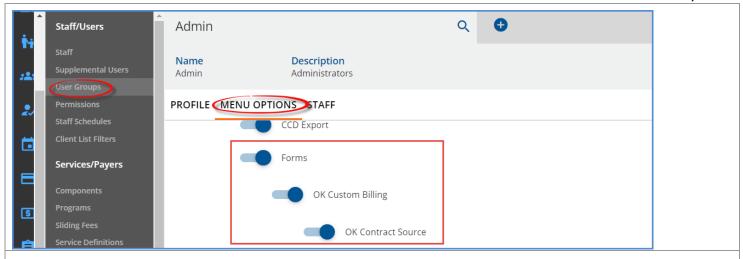


Grant User Group Access to the Custom Mapping Form

For a user to have access to the *OK Contract Source* mapping form, they must be a member of a User Group with the Menu Access enabled for the Category and Form. This access is granted in *Configuration > Staff/Users > User Groups > Menu Options*. Slide the toggle to the right to enable the appropriate Category and Form. Note that the Form Caption is displayed on the Menu Options screen rather than the Form Name.

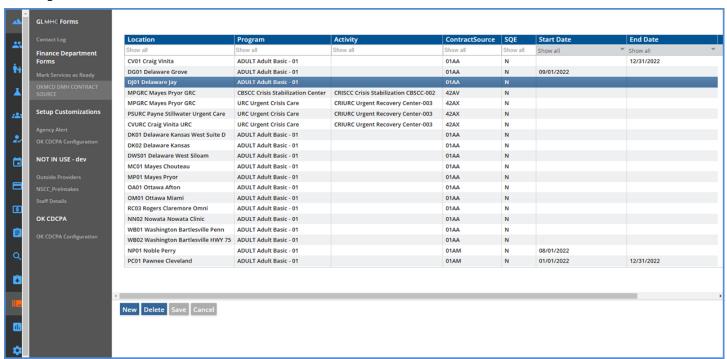


March 10, 2023



Accessing the Custom Mapping Form

After granting menu access, users can navigate to the Forms menu to review, update, or delete the Contract Source mapping, including the effective dates.

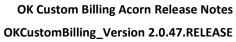




The Start and End Date columns were added to the Contract Code Mapping Form without validation. Each Start and End Date pair must be manually validated. In addition, ensure that rows with the same Location, Program, Activity, ContractSource, and SQE information do not have overlapping effective date ranges.

Configure Rendering Staff Billing Zip Codes

Configure the billing zip code for Rendering Staff in *Configuration > Staff/Users > Staff > Credentials*. The zip+4 is reported for Rendering Staff with an active Credential Code of *BZIP*. The *BZIP* Credential Code's Start and End dates are observed in reporting the zip+4 information.







OFILE COMMUNICATIO	NS EMPLOYMEI	NT CREDENTIALS							
Credentials									
Credential	Number	Issued By	Verified Date	Verified By	Start Date	End Date	Expiration Date	Include In Signatur	Signat
BZIP Billing Zip Code	038754720				04/01/2019	12/31/2021		No	
BZIP Billing Zip Code	730204599				01/01/2022			No	
BHPLA LADC Under Supervision	BP12345				04/01/2019			No	
LBHP Licensed Behavioral Health Professional	BT12345				07/01/2020			No	



CREATING BILLS USING THE ACORN

The Acorn follows the typical billing process in Fiscal Overview of Creating Charges and then Creating Bills. When this Acorn is assigned in the 837P Billing Method configuration and an 837P *Create Bills* job is run in *Fiscal Overview > Unbilled Charges*, the following custom logic is applied during the 837P file creation.

- Only Primary Charges for the Service are included in the 837P for Payers with the Acorn configured. If a Charge was created for a prior Payer,
 - o It is excluded from the 837P job.
 - And returned to Active Status for inclusion in a future, non-837P job.
- The Contract Source Code of OKCODE is reported in the Loop 2300 NTE segment.
- Rendering Staff Zip+4 is also reported in the Loop 2300 NTE segment as NTE*ADD*OKCODE 038184175 or NTE*ADD*OKCODE
 - 'OKCODE' is always the first six characters.
 - Spaces preserve characters 7-8 for a two-character value that is not currently required.
 - The Zip is pulled from Staff Credentials where the Credential Code = BZIP.
 - The Acorn pulls the value as populated. If it is only a 5-digit zip code, 5-digits are reported in the Acorn.
 - Staff Credential Effective Dates are observed in reporting the correct BZIP information.
 - o If a BZIP credential is missing for a rendering staff, characters 9-17 are not reported.
- The Contract Source is reported in the HCP segment as follows:
 - O HCP01 = '10' (Other)
 - HCP02 = Charge Amount
 - HCP04 = Contract Source Value
 - The OK Contract Source mapping form, configured in the section above, is used to determine the Contract Source value.
 - The Acorn looks for the mapped Contract Source value based on the Service's Program and (Billing) Location component values where the mapping's Start and End Dates encompass the Service Date.
 - If the Service's Place of Service component (additional component 1) value is 'PHONE' or 'TELE,' the Location code configured on the Service's matching Enrollment is used to map to the Contract Source value, NOT the Service's Billing Location component value.
 - The Enrollment used is where the Start and End Dates encompass the Service Date, and the Enrollment Program matches the Service Program.
 - o If a matching Enrollment is not found, the Acorn defaults back to the *Billing Location* on the Service to determine the Contract Source Code.
 - Some mapping records (three Urgent Recovery related) have Location, Program, and Activity
 values. A Service must match all three component code values for the associated
 ContractSource value to report.
 - If no matching Contract Source Code is found, an error "Missing Contract Source" is reported.
- SQE Services have a different Contract Source mapping which reports when the Client Code associated with the Service is *PA (Programmatical Activity)* and the Service provided is *STRNG, EDUCA, CONSU,* or *SYSU.*
 - These mappings have SQE = Y on the mapping form.
 - The Program component value is not populated, so the Contract Source value is determined by the *Billing Location* component value when the two conditions above are met.
 - Again, if no matching Contract Source Code is found, an error "Missing Contract Source" is reported in the Fiscal Overview > Unbilled Charges > Errors screen.





EXAMPLES

A few examples are provided below to demonstrate the relationship between the Service component values, the mapping form, Staff BZip Credentials, Secondary Charges, and the resulting 837P file information.

Ex. 1: A Single Mapped Service is Provided

The following Service was provided to a Client with a single Payer with the OK 837P Customization configured.

Service				✓ ASINT: Assessment MH	1	
Program *		Billing Location *		Activity *	Attendance *	Focus
ADULT: Adult Basic - 01	v	CV01: Craig Vinita	~	ASINT: Assessment-101/110	CMP: Complete	MH: Mental Health
Place of Service *		Tele Provider Locat		Tele Client Locat		
COMM: Community	~	Start typing to search	~	Start typing to search		

The following row is the matching record in the *OK Contract Source* mapping form. The Service date is 07/06/2022 which falls with the effective date range of the mapping – it only has an End Date of 12/31/2022.

Location	Program	Activity	ContractSource	SQE	Start Date	End Date
Show all	Show all	Show all	Show all	Show all	Show all	Show all
CV01 Craig Vinita	ADULT Adult Basic - 01		01AA	N		12/31/2022
DG01 Delaware Grove	ADULT Adult Basic - 01		01AA	N	09/01/2022	
DJ01 Delaware Jay	ADULT Adult Basic - 01		01AA	N		
MPGRC Mayes Pryor GRC	CBSCC Crisis Stabilization Center	CRISCC Crisis Stabilization CBSCC-002	42AV	N		

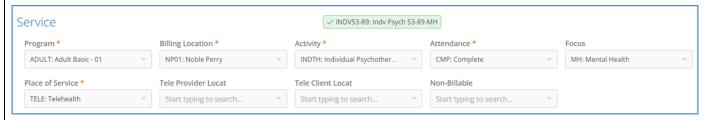
After the Charge is created and then included in an 837P *Create Bills* job, the following highlighted sections are included in the 837P file by the Acorn. (The snippet is pulled from the Debug file to identify the loops and segments easily.)

```
[L.2000B!L.2010BB]NM1*PR*2*MCD MEDICAID OKLAHOMA HEALTH CARE AUTHORITY*****PI*9999
[L.2000C!L.2300]CLM*1113921-11422*103.33***99:B:1*Y*A*Y*Y*P

[L.2000C!L.2300]NTE*ADD*OKCODE 740171088
[L.2000C!L.2300]HI*ABK:F322
[L.2000C!L.2300!L.2310B]NM1*82*1*SHERWOOD*HEATHER****XX*1234567890
[L.2000C!L.2300!L.2400]LX*1
[L.2000C!L.2300!L.2400]SV1*HC:H0031:HE*103.33*UN*1***1
[L.2000C!L.2300!L.2400]DTP*472*D8*20220706
[L.2000C!L.2300!L.2400]REF*6R*1113921-11422
[L.2000C!L.2300!L.2400]HCP*10*103.33**01AA
```

Ex. 2: A Service Has a Place of Service Value That Triggers the Use of Enrollment Location

The same Client receives the following Service. Note that the Place of Service component value is TELE: Telehealth.



When the *Place of Service* component value is *TELE: Telemed* or *PHONE: Phone*, the Acorn uses the Location from the Enrollment that encompasses the Service Date to determine the mapping, NOT the *Billing Location* component value from the Service. If a matching Enrollment is not found, the Acorn defaults back to the *Billing Location* on the Service to determine the Contract Source Code.





The following highlighted row is the matching record in the *OK Contract Source* mapping form and the Service Date falls with the mappings effective date range.

			○ ③
Location	Program	Activity	ContractSource
Show all	ADULT	Show all	Show all
NP01 Noble Perry	ADULT Adult Basic - 01		01AM
PS01 Payne Stillwater Walnut	ADULT Adult Basic - 01		01AM
RC03 Rogers Claremore Omni	ADULT Adult Basic - 01		01AA
OA01 Ottawa Afton	ADULT Adult Basic - 01		01AA
DK01 Delaware Kansas West Suite D	ADULT Adult Basic - 01		01AA
KP03 Kay Blackwell	ADULT Adult Basic - 01		01AM
CV01 Craig Vinita	ADULT Adult Basic - 01		01AA
KP01 Kay Ponca City 4th St	ADULT Adult Basic - 01		01AM
PS02 Payne Stillwater Cimarron	ADULT Adult Basic - 01		01AM
NN02 Nowata Nowata Clinic	ADULT Adult Basic - 01		01AA
MP01 Mayes Pryor	ADULT Adult Basic - 01		01AA
PC01 Pawnee Cleveland	ADULT Adult Basic - 01		01AM
WB01 Washington Bartlesville Penn	ADULT Adult Basic - 01		01AA
DG01 Delaware Grove	ADULT Adult Basic - 01		01AA
PS03 Payne Stillwater Cimarron Call Center	ADULT Adult Basic - 01		01AM
OM01 Ottawa Miami	ADULT Adult Basic - 01		01AA
OP01 Osage Pawhuska	ADULT Adult Basic - 01		01AM
DWS01 Delaware West Siloam	ADULT Adult Basic - 01		01AA
KP02 Kay Ponca City Union St	ADULT Adult Basic - 01		01AM

After the Charge is created and then included in an 837P *Create Bills* job, the following highlighted sections are included in the 837P file by the Acorn. (The snippet is pulled from the Debug file to identify the loops and segments easily.)

```
[L.2000C!L.2300]CLM*0000004-32*203.33***53:B:1*Y*A*Y*Y*P

[L.2000C!L.2300]NTE*ADD*OKCODE
[L.2000C!L.2300]HI*ABK:F3131

[L.2000C!L.2300!L.2310B]NM1*82*1*STAFFER*JOE*M***XX*1234567890

[L.2000C!L.2300!L.2400]LX*1

[L.2000C!L.2300!L.2400]SV1*HC:90837:GT*100*UN*1***1

[L.2000C!L.2300!L.2400]DTP*472*D8*20220105

[L.2000C!L.2300!L.2400]REF*6R*0000004-32

[L.2000C!L.2300!L.2400]HCP*10*100.0**01AA
```

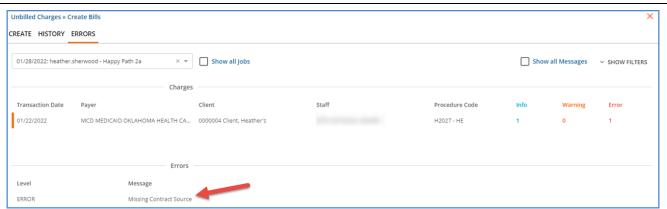
Note the Loop 2300 NTE segment above; there is no Zip+4 Billing Code because the Rendering Staff on the Service did not have a BZIP credential code configured.

Ex. 3: No Matching Contract Source Mapping Record

When a Charge is included in an 837P Create Bills job for a Payer with the OK 837P Customization configured, and the associated Service's components cannot be matched to an OK Source Contract Code or it cannot be matched to an active OK Source Contract Code, the following error is thrown Missing Contract Source.



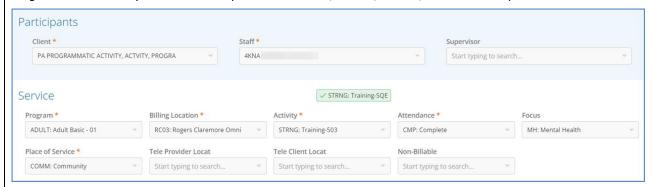




If the errors are not addressed before finalizing the *Create Bills* job, the Charge(s) associated with the error(s) are returned to *Active* Status.

Ex. 4: SQE Services

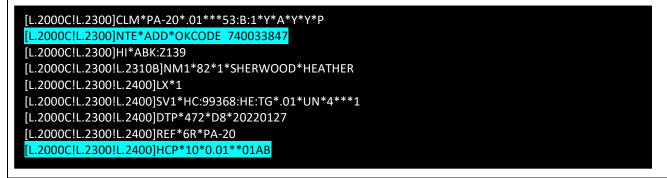
The SQE Service mappings (SQE = Y on the *OK Contract Source* form) are used when the Client on the Service is *PA* – *Programmatical Activity* and the Service provided is *STRNG, EDUCA, CONSU*, or *SYSU*. A sample of an SQE Service is below.



The following highlighted row is the matching record in the *OK Contract Source* mapping form and the Service Date falls with the mappings effective date range.



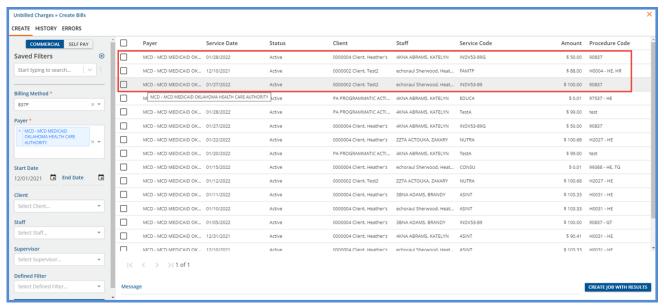
After the Charge is created and then included in an 837P *Create Bills* job, the following highlighted sections are included in the 837P file by the Acorn. (The snippet is pulled from the Debug file to identify the loops and segments easily.)



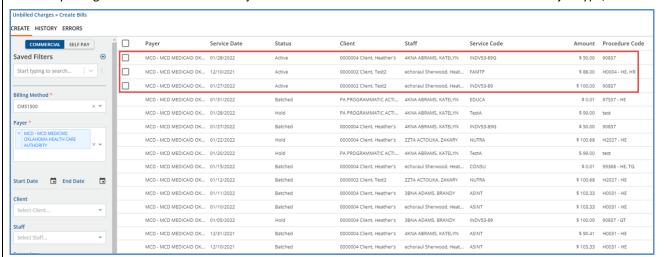


Ex. 5: Non-Primary Charge Included in Acorn Job

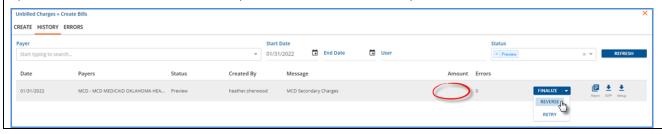
The OK Custom Billing Acorn includes Primary Services only during the *Fiscal Overview > Unbilled Charges > Create Bills* process. If a non-primary Charge is included in a *Create Bills* job, the Acorn removes it from the job and returns it to *Active* Status. Medicare is the secondary Payer for the three Charges outlined in red below.



The Charges above were included in an 837P *Create Bills* job for Medicaid and other Primary Charges. A Bill was created, and the Charge Status was updated to *Batched* for Primary Charges and *Hold* for Charges with an error (like *Missing Contract Source*). The secondary Charges were removed from the job and returned to *Active* Status for inclusion in another job type, like CMS1500.



If a *Create Bills* job contains only Secondary Charges, the job is created but has zero Services. This empty job can be reversed to update the Status and move it from the top of the *Unbilled Services History* screen.







UPDATES	
Ticket Number	Description
EV-6155	The most recently created Enrollment is now selected when the Contract Source is mapped based on Enrollment (instead of Location) for the phone/telehealth services. The dbo.Enrollments.CreateDate is used to determine the most recent.

BUG FIXES		
Ticket Number	Case Number	Description
EV-4224		In the 837 output file, the service is removed if there is a missing contract source, and if there are no services left the claim is removed. The issue reported was that the subscriber and payor information in the upper level was left behind which can cause the HL counts in the 837 to be incorrect. The issue was addressed by removing the subscriber information if there are no claims, and removing the provider information if there are no subscribers.
EV-4281		An issue was reported where the claim amount reported was incorrect when a service was removed due to a missing Contract Source. The issue has been resolved and now the claim amount is correct when services are removed.
EV-4309		Updated the Acorn to pull the Contract Code based on the Mapped Contract Code where the effective date range encompasses the Service Date. The Mapping form was also updated with two new columns, Start Date and End Date. The effective date ranges within and between rows must be validated manually.
EV-4764		An issue was reported where the Create Bills job failed if a Staff had a BZIP credential record, but the Number for that record was NULL. The issue has been addressed, and now if a Staff has a BZIP credential record without a number, the Create Bills job completes successfully, and characters 9-17 of the Loop 2300 NTE segment are simply not populated by the Acorn.
		NOTE Existing failed Acorn <i>Create Bills</i> jobs must be reversed, and the charges associated with the Null BZIP Staff must be reprocessed (Reprocess Active). Once the reprocessing job is finalized, the charges will process successfully in a new <i>Create Bills</i> job.