

BH Link Customization Release Notes

v2.0.168

Released July 17, 2023

Requires EchoVantage v3.31+

Document History

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Date	Description	Author	Version
06/01/2022	Initial Release	Heather Sherwood	2.0.79
08/17/2022	Updated to prevent more than one BH Link Per Diem from being created per encounter	Heather Sherwood	2.0.103
09/07/2022	Version bump due to changes to IHH/ACT	Heather Sherwood	2.0.108
09/16/2022	Updated to create the Per Diem for a single day, only report the shadow services for that day, and base the day to report on four specific Service Definitions.	Heather Sherwood	2.0.119
09/23/2022	Version bump due to changes to Staff Credential Modifier	Heather Sherwood	2.0.125
12/29/2022	Version bump due to changes to IHH/ACT	Heather Sherwood	2.0.132
02/23/2023	Version bump due to changes to IHH/ACT	Heather Sherwood	2.0.140
04/19/2023	Version bump due to changes to IHH/ACT	Heather Sherwood	2.0.144
06/05/2023	Fix an issue with an incorrect Program mapping, EV-7317	Heather Sherwood	2.0.146
06/30/2023	Version bump due to changes to IHH/ACT	Heather Sherwood	2.0.158
07/17/2023	Bug Fixes (Staff Credential Modifier/IHH/ACT) EV-7883 , EV-7112 , and EV-7607	Samantha Johnson	2.0.168

Overview

The BH Link customization addresses the need to create charges for BH Link-specific Service Definitions using a day rate or single Per Diem charge while also reporting the shadow claims for that day on the claim. The BH Link customizations include a new form to Create a Day Rate for provided BH Link Services and modifications to the 837 customization to accommodate the BH Link-specific billing requirements.

Installing the Acorn

The *install-ri-custom-billing-2.0.168.RELEASE.sql* installation script creates the *BH Link* record in the AcornRegistrations table and updates the RIHealthHomes Acorn version on the *Help > About* page. The script also installs three custom billing records for the IHH/ACT and Staff Credential Modifier customizations; details can be found in the RI IHH/ACT Acorn and Staff Credential Modifier Release Notes.

- A new form is inserted into `dbo.Forms` with a *FormCaption* of 'RI Custom BHLINK Billing'
- A new stored procedure called by the billing button to create the day services – *dbo.usp_RI_Acorn_Daily_Services_to_job*
- A second stored procedure called by the reversing button – *dbo.usp_RI_Acorn_Reverse_Daily_PerDiem_Services_Ready*

A custom data population script is also run to populate the following.

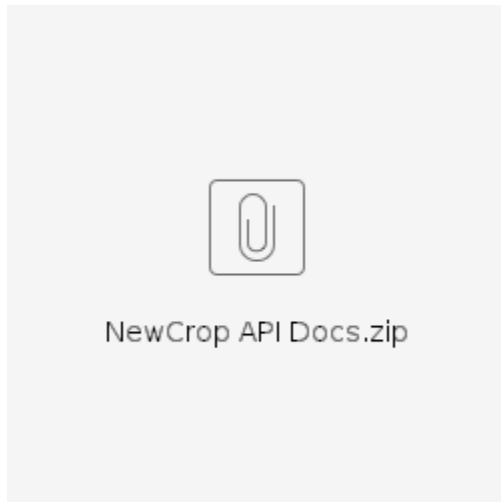
- The BH Link Service Definitions are inserted into `dbo.RICustomServiceDefintions` with Type 'D' and CountsTowardRequirement 'Y'
- A new record is inserted into `dbo.RIPerDiemDefinitions` with Type 'D' and zero '0' for MinimumMinutes, MinimumServices, and MinimumDuration

Configuring the Application

Enabling the Acorn

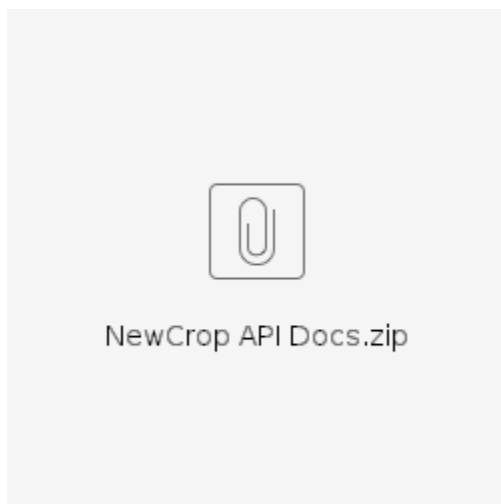
The custom form calls a stored procedure to initiate the Create Charges job utilizing the Acorn logic. At this point, the Ready BH Link services determine which Clients, and therefore Client Payers, are included. Charges are created for the Clients whose Payer has a Payer Rate override for the BH Link Per Diem Service Definition, BHLPD. Clients with a Payer that does not have a rate override result in an error, *NO CHARGE - No charge could be created*. For this reason, populating the Acorn field on the *Configuration > Services/Payers > Payers > Processing* tab is not required.

The 837P Billing Customization Acorn must be configured for each Payer that has a Rate override for the BHLPD. This can be done by navigating to the *Payers > Billing Methods* tab, selecting the 837 Professional, and then selecting the 837P Customization as shown below.



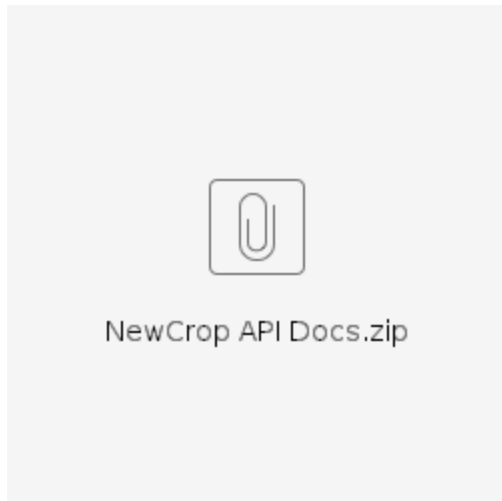
Defining the Payer Rate Override

Navigate to the Rates page of each Payer or the BHLPD Rates page. By default, the BHLPD is Not Billable to most Payers. Create a Rate override for any Payers who will be billed for BH Link PD charges. An example of the Service Definition's *RATES* tab is shown below.

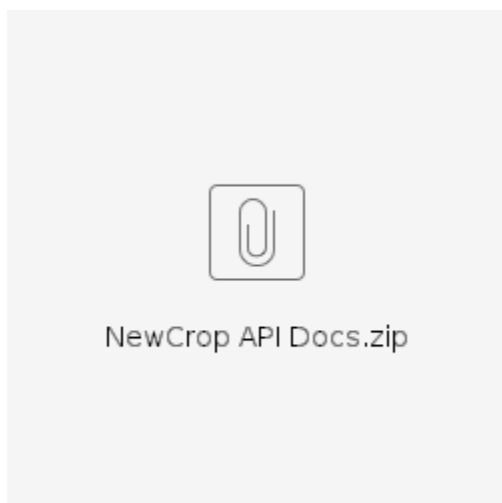


Configuring the Custom Forms

In *Configuration > Setup > Forms*, Add the new *RI Custom BHLINK Billing* to the RI Custom Billing Category by selecting the blue plus.



Then, navigate to *Configuration > Staff/Users > User Groups* to grant access to the newly added form for the appropriate User Groups in the Menu Options tab. Remember to select *SAVE* to record the changes.



Reviewing the Forms Main Menu Option

Navigate to the Forms main menu option and verify that the newly added *RI Custom BHLINK Billing* form displays. The forms for IHH/ACT billing should not require any changes due to this customization.

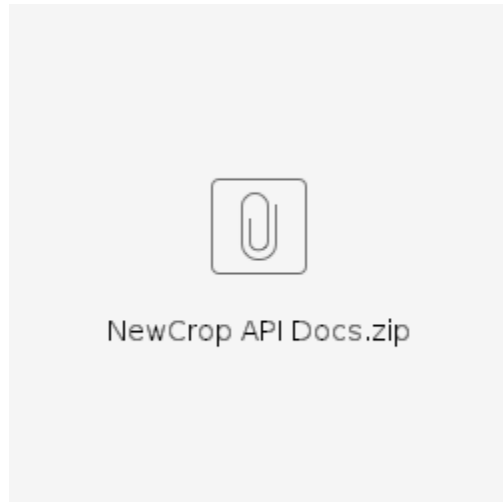
Configuration for the BH Link Billing Customization is complete.

Processing Services

It is assumed that each Client receiving BH Link services also has a BH Link Enrollment for the corresponding time period. If the BH Link Enrollment is not entered, or does not encompass the

service date(s), then the BH Link services are not picked up for processing by the Acorn and remain in *READY* status.

Processing BHLINK services requires that some Fiscal processes be initiated from the custom billing form, while others use core Fiscal Overview functions, similar to IHH/ACT billing. Select the *RI Custom BHLINK Billing* form (or the form name assigned by your agency when configured). Enter both a Start and End date in the Charge Creation section and then select the blue *Create Charges* button.



A Start and End Date must be entered in the Charge Creation section. If no dates are entered, the job is not created.

When Create Charges is selected on this custom billing form, the `dbo.usp_RI_Acorn_Daily_Services_To_Job` stored procedure starts the job, which is then visible on the *Fiscal Overview > Unprocessed Services > History* tab. Finalizing an Acorn-created *Create Charges* job and Billing these charges then uses the core billing functionality in Fiscal Overview.

Examples

#1 BH Link Enrollment and Services Encompass a Single Date of Service

Creating Charges

The following three BHLINK Services were provided to Client Sandy Beach on 08/30/2022.



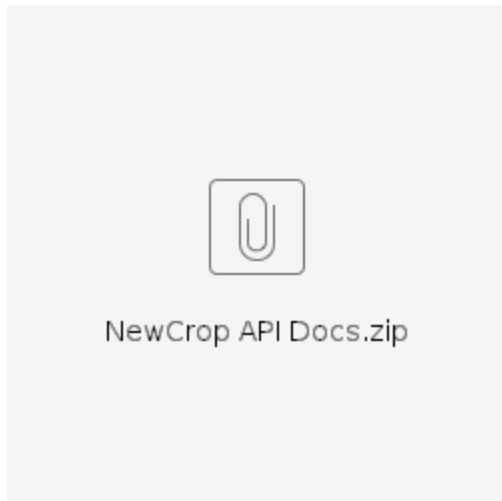
NewCrop API Docs.zip

Sandy had the following Enrollment information.



NewCrop API Docs.zip

The billing process begins with the **RI Custom BHLINK Billing** form. Charges are created for this single Client for the month of August.



After the Acorn processes the request from the form, the job is available in *Fiscal Overview > Unprocessed Services > History* in Preview Status.



- A single Per Diem charge is created per Client when a qualifying BH Link Service is provided during a BH Link Enrollment period.
- A qualifying BH Link Service Definition is one where the `dbo.RICustomServiceDefinitions.CountsTowardRequirement` column set to 'Y,' which is done by the data population script.
 - BHLASSESS
 - BHLRXASSESS
 - BHLRN
 - BHLCRISIS
- In the example above, a single Per Diem charge is created.
- If a Per Diem charge for the day already exists, then the Acorn simply updates the Service to a *DONE* status.
- Errors can be found on the adjacent Errors tab and should be reviewed before finalizing the job.

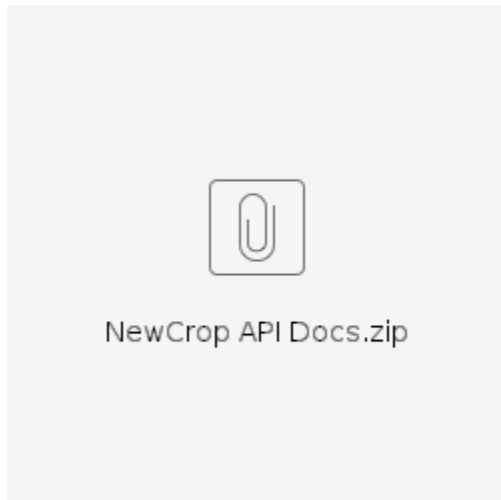
- The BHLINK Create Charges job can be retried from the *Unprocessed Services > History* tab before finalizing because the Acorn marks the individual Services as Done and creates the daily Per Diem Charge(s).
- Only the Per Diem Charges are retried; the linked individual Services remain in DONE Status.
- Retrying from the *Unprocessed Services > History* can pick up changes in Rate or updates to the Client's Payers.
- The job must be reversed using the RI Custom BHLINK Billing form to change the Services linked to the Per Diem Charge(s).
- *Reversing a BHLINK Create Charges job must be performed from the RI Custom BHLINK Billing Form, and is detailed in the Reversing Charges section below.*

Creating Bills

The creation of the 837P takes place in the core Fiscal Overview function Unbilled Charges. The following custom logic is triggered provided the RI 837P Customization is specified in the Acorns field of the 837P for each applicable Payer.

- If a BHLINK Per Diem service is found, it is billed as the first service on the claim.
- Because Payer Category is Medicaid, the other same-day services in the Per Diem are also reported as services on the claim, but with a \$0.00 charge amount.

The 837P (debug) file for Sandy Beach's 08/30 charge is shown below.



#2 BH Link Enrollment and Services Encompass Multiple Days

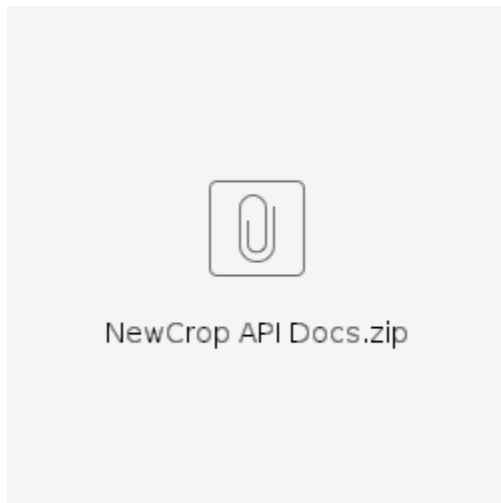
If services cross days,

- The day with either BHLASSESS or BHLCRISIS is used to create the per Diem charge.

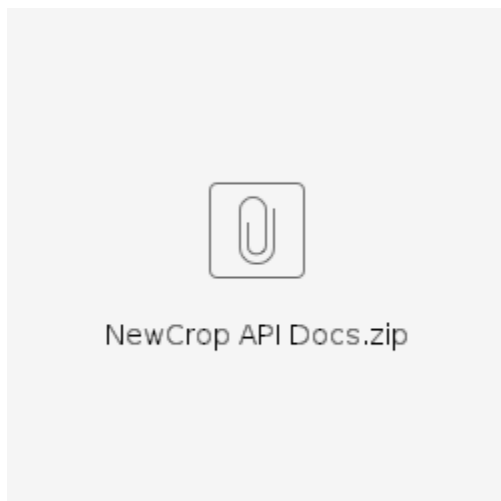
- If both days have one of the Service Definitions above, the day with the most BH Link services is used to create the Per Diem, and only the shadow services for that day are reported in the 837.
- All shadow services within the corresponding Enrollment period are still set to *DONE*.
- This approach prevents two separate claim lines when an enrollment spans more than a day, such as providing services overnight.

Creating Charges

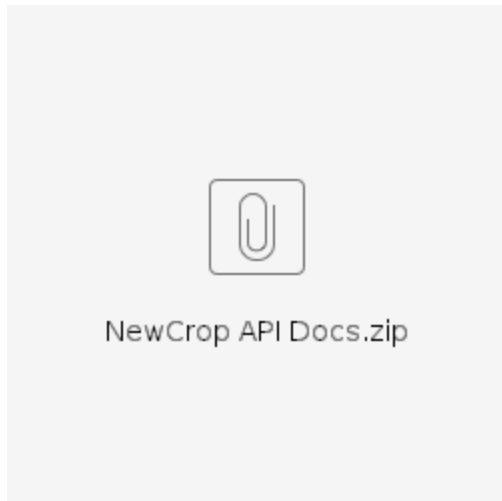
The following three BHLINK services were provided to Client Myrtle Beach from 08/20/2022 through 08/21/2022.



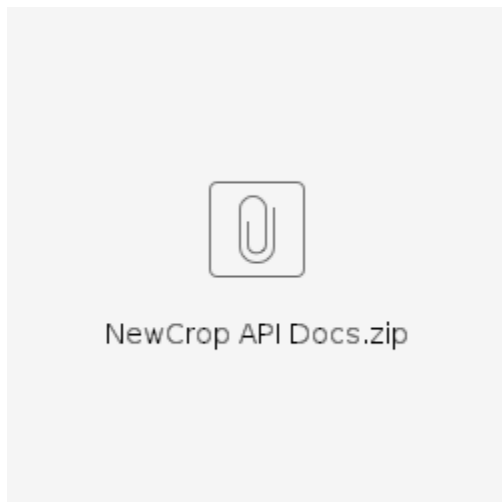
Myrtle had the following Enrollment information.



Once again, the Create Charges process was initiated from the **RI Custom BHLINK Billing** form and can be found in the History tab of *Fiscal Overview > Unprocessed Services*. Selecting the Job Details, we see a single Per Diem charge is created for 08/20/2022.



The Services screen is updated and now shows the Per Diem charge and the associated BH Link Services that occur during the BH Link enrollment are marked as *DONE*.



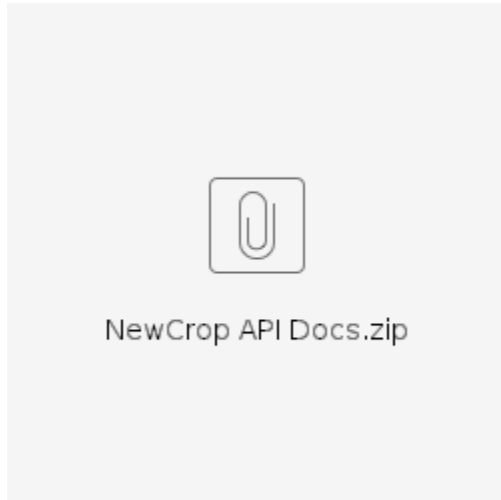
In the example above, both days contain qualifying services but the Per Diem is created for 8/20, the day with the BHLCRISIS service.

Creating Bills

Again, the creation of the 837P takes place in the core Fiscal Overview function Unbilled Charges. The following custom logic is triggered provided the RI 837P Customization is specified in the Acorns field of the 837P for each applicable Payer.

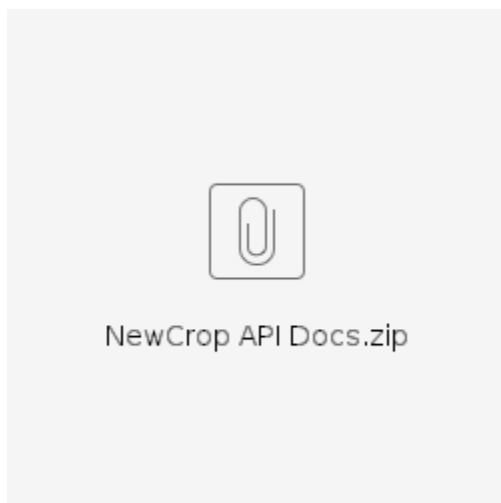
- If a BHLINK Per Diem service is found, it is billed as the first service on the claim.
- Because Payer Category is Medicaid, the other same-day services in the Per Diem are also reported as services on the claim, but with a \$0.00 charge amount.
- The related BH Link services that were not provided on the same date as the Per Diem charge are NOT included in the bill.

The 837P (debug) file for Myrtle Beach's 08/20 charge is shown below.



Reversing Per Diem Charges

A BHLINK Per Diem Charge can only be fully reversed using the *RI Custom BHLINK Billing* form, the same form used to create the Charges. The *Reverse Per Diem* section allows Per Diem Charge(s) to be reversed on a per-Client basis and has two reversing options.



Reverse Per Diem and Set Shadow Services Ready – Reverses the Acorn created Per Diem Charge(s), removing it from the database, and resets the individual Shadow Services from *DONE* status to *READY* status. This process also removes the records in the `dbo.RICustomPerDiemServices` table that linked the Per Diem Charge(s) and the individual Services.

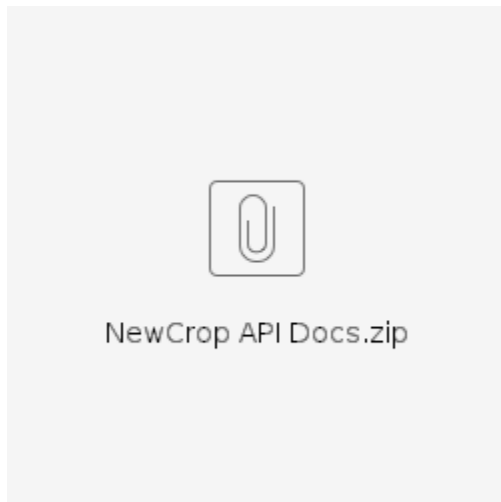
The two recommended workflows for reversing Acorn created Per Diem Charges are detailed below. The appropriate workflow selection depends on whether the Per Diem Charge is

currently in an unfinalized *Create Charges* job or if the *Charge Creation* process was completed. Each process is covered below.

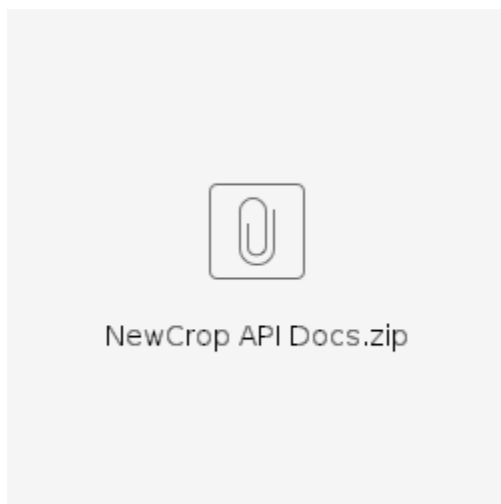
Per Diem Charge is Unfinalized

If the Per Diem Charge is currently in an *Unprocessed Services > Create Charges* job that has not been finalized, the reversing process starts on the custom billing form.


For example, the following *Create Charges* job is in Preview Status for Client #CL for 05/26/2022 BH Link Services.



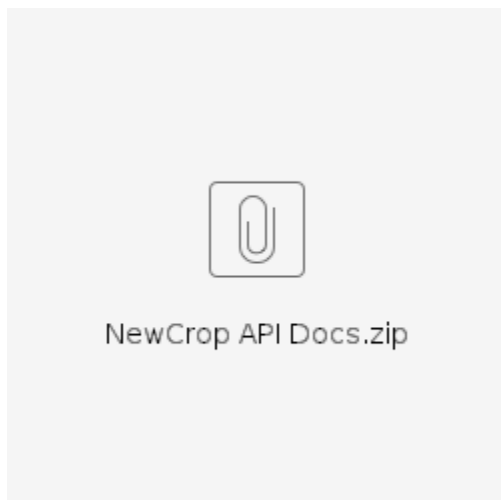
While the job is still in Preview Status, a look at the Services detail shows that the two BH Link Services related to the Per Diem Charge have a *DONE* Status while the Acorn created Per Diem Charge (highlighted in yellow) has a *Charge Created* Status.



To reverse the Per Diem Charges

 <p style="text-align: center;">NewCrop API Docs.zip</p>	<ol style="list-style-type: none"> 1. Navigate to the forms menu 2. Select the <i>RI Custom Billing</i> form 3. Enter at least one Date and optionally a Client Name 4. Deselect the <i>Errors Only</i> checkbox if all BH Link Per Diem Charges that have the <i>Charge Created</i> or <i>Ready</i> status should be deleted. Otherwise, only Per Diem charges that have a related service processing error will be deleted 5. Then select <i>Reverse Per Diem and Set Shadow Services Ready</i> 6. The values Start Date, End Date and Client are cleared once the Stored Procedure is triggered <p>Since the example PD charge was error free, the <i>Errors Only</i> checkbox is not selected in the image to the right.</p>
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When the reversal option is selected, a stored procedure is called that reverses the Per Diem Charge(s) and makes the necessary database updates. Once processing is finished, the 5/26/2022 BH Link Services for Client #CL in the Unprocessed Services > Create screen display as follows.



- The Per Diem Charge is removed
- The two Shadow Services now have a READY Status instead of DONE

If all Per Diem Charges in a *Create Charges* job initiated by the Acorn (started from the *RI Custom BH Link Billing* form) are reversed, the job itself remains in the *Unprocessed Services > History* screen with no Details. *Reverse* or *Finalize* the job to update the status to *DONE* so it does not remain at the top of the list. An example is below.

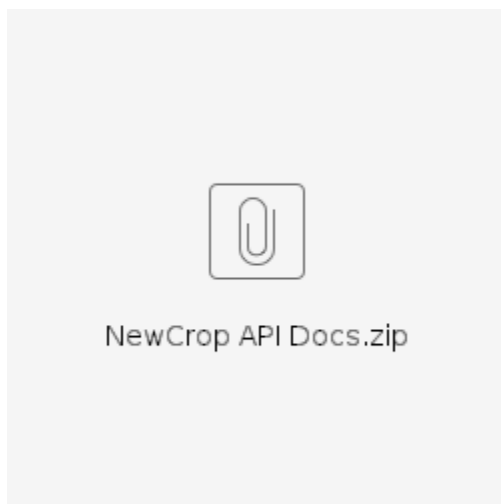
Please note that at this time, using the RI Custom BHLINK Billing form to reverse the Per Diem will only set the shadow charges that occurred on the same date as the Per Diem back to Ready. Other services in the BH Link Enrollment period that were set to Done by the Acorn must be manually returned to Ready status.

Per Diem Charge was Finalized

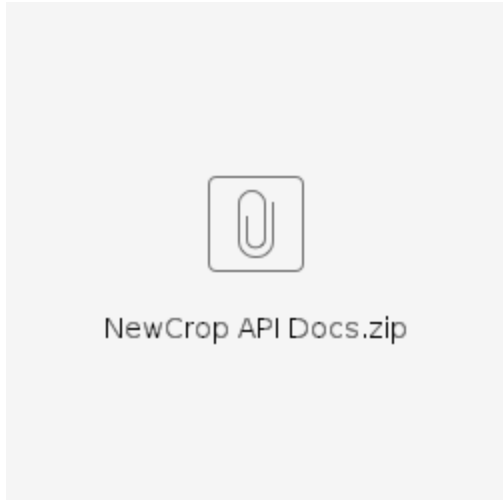
If the Per Diem Charge was created and the *Create Charges* job was finalized, the reversing process starts on the Claims Management screen. After the *Create Charges* job is finalized, the *Status* for each associated service is still as follows.



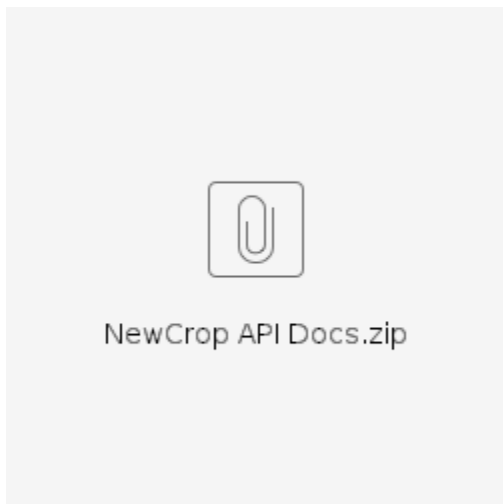
Step 1 - Locate the charge to be reversed in Claims Management, create a Reverse Service Transactions Job, and select the blue *CONTINUE WITH SELECTION* button to create the reversing job.



Step 2 – Review and Finalize the Reverse Service Transactions Job.



Step 3 – Review the Services. Note that the Per Diem service now has a *Ready* status and both shadow services still have the *Done* status.



Step 4 – Complete the reversing process by using the *RI Custom BH Link Billing* form as outlined in the section above. When complete, the Per Diem service is removed and the two shadow services are in *Ready* status.



NewCrop API Docs.zip

Improvements

Ticket Number	Case Number	Description
EV-4919	CCA	Updates were made to the BH Link Per Diem creation so that it is created for a single day and only the shadow services for that day are reported. One of the following four services must have been provided for a Per Diem charge to create: BHLASSESS, BHLRXASSESS, BHLRN, and BHLCRISIS.

Bug Fixes

Ticket Number	Case Number	Description
EV-7317	20468	An issue was reported where running the IHH/ACT acorn job for BH Link services resulted in an error. The cause was due to unmapped programs for some of the BH Link services, which meant a charge could not be created. The issue was resolved, and now any Per Diem BH Link charges that can be properly created, are created and saved. Those that cannot are skipped.