



WI BUNDLING ACORN RELEASE NOTES

WI-BUNDLING – VERSION 1.0.26

REQUIRES ECHOVANTAGE VERSION 3.15 OR HIGHER

OVERVIEW

The WI Bundling Acorn addresses state (Medicaid) specific 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.

INSTALLING THE ACORN

SAAS CUSTOMERS

Echo support will contact you to determine the best time to install this version. The installation inserts two Acorn Registrations, one for Service Processing, *WI Bundling Customization*, and one for Billing, *WI 837P Customization*.

CONFIGURING THE APPLICATION

- 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.

Forward Health

Code	Plan	Type	Category	Payer ID	CMS Payer Name	Address	Phone	Web Site
FHC	WI-Bundling-Payer	Commercial	3rd Party Commercial	4142862489	Other(349)	City Hall 200 E Wells St Room 201 Milwaukee, WI 53202	Mayor's Office: (414) 286-2200 Mayor's Mobile: (414) 286-3191	city.milwaukee.gov

PROFILE COMMUNICATIONS **PROCESSING** RATES BILLING METHODS NPI ELIGIBILITY POS MAPPINGS

Bill for Any Staff Credential Bill for Supervising Staff
Credential Error Action Hold Release Use Supervisor's Rate

Bill for Any Diagnosis Contractual Adjustments Waterfall to the Next Payer(s)
Diagnosis Error Action Hold Release Allow Service Bundling

Acorns
Select Acorn...
Ohio BH Redesign
WI Bundling Customization

- Configure or edit the 837 Professional for this Payer. Ensure that the *WI 837P Customization* Acorn is selected.

Forward Health

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PROFILE COMMUNICATIONS PROCESSING RATES **BILLING METHODS** NPI ELIGIBILITY POS MAPPINGS

837 Professional Header
CMS-1500 Paper
837 Institutional

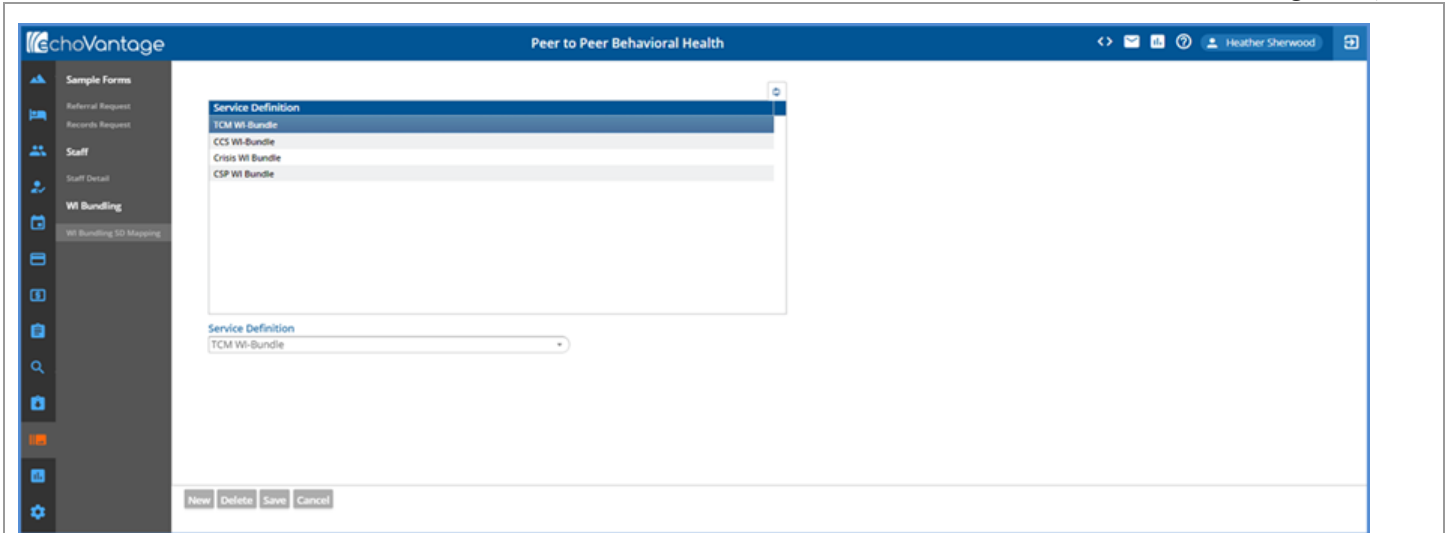
Acorns
WI 837P Customization x Submitter Name (Loop 1000A, NM103) Receiver Name (Loop 1000B, NM103)



- Review the Payer POS Mappings tab.
 - 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 a Payer’s Place of Service.

- 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.**
- Review Staff Credentials in *Configuration > Staff/Users > Staff > Credentials*. **Only Staff Credentials that are active and have the *Include in Signature* field set to No are considered.**
- 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 and Min. Services for the child Service Definition
- Review the default Rates for the bundled and individual Service Definitions. Define Payer specific rates if needed.
- In *Configuration > Setup > Forms*, add the `WI_BNDL_Service_Definition_Mapping` form to an existing Category or create a new Category. In the example, the form was given a *Display Name* of *WI Bundling SD Mapping*.

- The Acorn installs this form already 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*
- Visit webhelp.echoehr.com/forms for more detailed information on Forms configuration.
- From the *Forms* main menu option,
 - 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. 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.

ServiceDate	Client	Duration	Payer	Procedure Code	Units	Charge Amount	Balance
07/15/2020	000002 Dane,	60 mins	FHC	59484 -	2	\$ 400.00	\$ 400.00
07/15/2020	000002 Dane,	60 mins	FHC	88888 -	6	\$ 120.00	\$ 120.00
07/15/2020	000002 Dane,	60 mins	FHC	88888 -	6	\$ 60.00	\$ 60.00
07/15/2020	000002 Dane,	60 mins	FHC	59484 -	2	\$ 400.00	\$ 400.00
07/14/2020	DIGG000 Digger,	60 mins	FHC	H2017 -	12	\$ 1,200.00	\$ 1,200.00

CREATING AN 837P USING THE ACORN

The *Create Bills* process in *Vantage Point > Fiscal Overview > Unbilled Charges* also remains unchanged. The WI-Bundling Acorn selected on the 837P Configuration for the Payer applies the billing customizations when processing a Create Bills job. This 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, in the Claims Management screen for Client Mireya Cressey the following charges show as *Outgoing* to FHC:

										Payer Balance: \$ 2,118.13 Client Balance: \$ 0.00	
<input type="checkbox"/>	Date	Service	Staff	Active/Last Payer	Charge Status	Service Status	Last Billed	Charge	Paid	Payer Balance	Client Balance
<input type="checkbox"/>	07/13/2020	TCM	H5123	FHC	Outgoing	Charge Created	07/17/2020	\$ 1,316.49	\$ 0.00	\$ 1,316.49	\$ 0.00
<input type="checkbox"/>	06/29/2020	TCM	H5123	FHC	Outgoing	Charge Created	07/17/2020	\$ 752.28	\$ 0.00	\$ 752.28	\$ 0.00
<input type="checkbox"/>	06/26/2020	TCM	MB123	FHC	Outgoing	Charge Created	07/17/2020	\$ 49.36	\$ 0.00	\$ 49.36	\$ 0.00



The Claim Details for the 07/13/2020 bundle shows the 07/13 charge is bundled with two other services:

FHC 13 Bundled with 2 other Services							NOTES & TASKS
Date	Amount	Reason	Last Billed	Authorization	Status	Procedure Code	Diagnosis
07/13/2020	\$ 1,316.49	CHARGE CREATED	07/17/2020		OUTGOING	T1017 -	F16.122
Balance:		\$ 1,316.49					
Total Balance:		\$ 1,316.49					

The Services that make up this bundle are dated 07/06, 07/13, 07/17:

<input checked="" type="checkbox"/>	MARK READY	<input type="checkbox"/>	DELETE						BULK ACTIONS
<input checked="" type="checkbox"/>	Status	Date	Start Time	Client	Staff	Service Code	Program		
<input checked="" type="checkbox"/>	Charge Created	07/17/2020	10:00 AM	000026 Cressey, Mireya	JA123 Austins, Jon	TCM	WIB	<input type="button" value="B"/>	
<input checked="" type="checkbox"/>	Charge Created	07/13/2020	10:00 AM	000026 Cressey, Mireya	HS123 Sherwood, Heather	TCM	WIB	<input type="button" value="B"/>	
<input checked="" type="checkbox"/>	Charge Created	07/06/2020	10:00 AM	000026 Cressey, Mireya	HS123 Sherwood, Heather	TCM	WIB	<input type="button" value="B"/>	

The claim loop in the 837P for this bundle has a service date of 07/31/2020:

```
[L.2000C!L.2300]CLM*000026-4896*1316.49***07:B:1*Y*Y*Y*Y*P
[L.2000C!L.2300]HI*ABK:F16122
[L.2000C!L.2300!L.2310B]NM1*82*1*SHERWOOD*HEATHER***XX*0004191971
[L.2000C!L.2300!L.2400]LX*1
[L.2000C!L.2300!L.2400]SV1*HC:T1017:..*1316.49*UN*3.5***1
[L.2000C!L.2300!L.2400]DTP*472*D8*20200731
```