



WI CUSTOM BILLING ACORN RELEASE NOTES

WI-BUNDLING – VERSION 1.0.34

REQUIRES ECHOVANTAGE VERSION 3.16 OR HIGHER

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. No Referring Provider is reported for Services that do not match a row in the *Referring Provider Mapping* form.

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.



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PROFILE COMMUNICATIONS PROCESSING RATES BILLING METHODS NPI ELIGIBILITY POS MAPPINGS

837 Professional
CMS-1500 Paper
837 Institutional

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

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

PROFILE COMMUNICATIONS PROCESSING RATES BILLING METHODS NPI ELIGIBILITY POS MAPPINGS

Use Defined Filters For Mapping

Place of Service Mappings

Place of Service (Location Component) * Payer Place of Service *

COMM: Community Center x 3: Community Mental Health Center x

+ ADD

CANCEL SAVE

- 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.**
 - 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.

Credentials

Credential	Number	Issued By	Verified Date	Verified By	Start Date	End Date	Expiration Date	Include In Signature
DO Physician	23423243423	LouB	07/25/2020	DrHoward	07/12/2020	07/12/2024	07/18/2024	No

- 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.



Bundling Options

Frequency *
 Monthly x ▾

Minimum Total Services *
 1

Maximum Total Services *
 999

Bundle for Same Staff Only

Bundled Service Definitions

Service Definition *	Billing Priority *	Min. Services *	When Service Does Not Bundle *
Wi TCM x ▾	1	3	Put On Hold x ▾

+ ADD BUNDLED 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 WISTaffMapping 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.

Forms

- WI Custom Billing
 - WI Bundling SD Mapping
 - WI Staff Mapping

Drop forms here to add to category

- 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*
- Visit webhelp.echoehr.com/forms for more detailed information on Forms configuration.
- From 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 on the Payer and Program combination.
 - If the Service does not match a row in the grid, no Referring Provider is reported on the 837P, even if the Client Enrollments tab has Referring Provider information.
 - The Staff field is validated to the Staff entered in EchoVantage.

Peer to Peer Behavioral Health

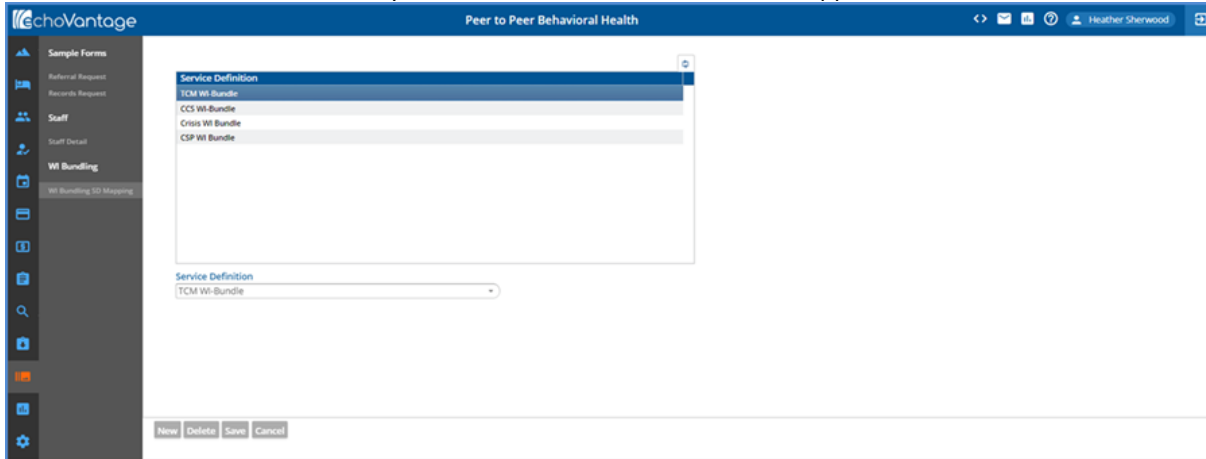
Referring Provider Mapping

Payer	Program	Staff
Medicaid	ADP	Joe Staffer
WI Bundling Payer	WBNDL	Ron Hartford

Save Cancel



- 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, [redacted]	60 mins	FHC	59484 -	2	\$ 400.00	\$ 400.00
07/15/2020	000002 Dane, [redacted]	60 mins	FHC	88888 -	6	\$ 120.00	\$ 120.00
07/15/2020	000002 Dane, [redacted]	60 mins	FHC	88888 -	6	\$ 60.00	\$ 60.00
07/15/2020	000002 Dane, [redacted]	60 mins	FHC	59484 -	2	\$ 400.00	\$ 400.00
07/14/2020	DIGG000 Digger, [redacted]	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 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.

Referring Provider

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 Staff name for that row is reported as the Referring Provider in Loop 2310A. If a match is NOT found, no referring provider is reported.

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

Status	Date	Start Time	Client	Staff	Service Code	Program
Ready	09/01/2020	11:00 AM	YOSS0000 Yost, Shaun	HS123 Sherwood, Heather	MED	MED
Ready	09/01/2020	1:00 PM	YOSS0000 Yost, Shaun	HS123 Sherwood, Heather	CASE	ANGMNG

- The Client's Primary Payer is Medicaid, and the Acorn is configured for Medicaid's 837P.
- Note the two Programs, *MED* and *ANGMNG*.
- Also, note that Medicaid is mapped to some Programs and Staff on the following form.



Referring Provider Mapping



Payer	Program	Staff
WI Bundling Payer	WIBNDL	Ron Horford
Medicaid	ADP	Joe Staffer
Medicaid	MED	Nurse Jones

When the Create Bills function is processed for Medicaid, Nurse Jones is reported as the Referring Provider for the Medication Management (Program MED) Service, and no Referring Provider is reported for the Case Management (Program ANGMNG) Service.

Referring Provider Reported	No Referring Provider Reported
<pre>[L.2000C!L.2010CA]NM1*QC*1*YOST*SHAUN [L.2000C!L.2010CA]N3*15.SNUG.HARBOR.LANE.UNIT.F [L.2000C!L.2010CA]N4*IMPERIAL.BEACH*CA*91933 [L.2000C!L.2010CA]DMG*D8*20070704*M [L.2000C!L.2300]CLM*YOSS0000-5737*400***11:B:1*Y*C*N*Y*P [L.2000C!L.2300]REF*G1*HS-0901 [L.2000C!L.2300]HI*ABK:F941 [L.2000C!L.2300!L.2310A]NM1*DN*1*JONES*NURSE***XX*1235431354 [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:90863;HE:..*400*UN*2***1 [L.2000C!L.2300!L.2400]DTP*472*D8*20200901 [L.2000C!L.2300!L.2400]REF*6R*YOSS0000-5737 SE*30*1200 GE*1*1200 IEA*1*000001200</pre>	<pre>[L.2000C!L.2010CA]NM1*QC*1*YOST*SHAUN [L.2000C!L.2010CA]N3*15.SNUG.HARBOR.LANE.UNIT.F [L.2000C!L.2010CA]N4*IMPERIAL.BEACH*CA*91933 [L.2000C!L.2010CA]DMG*D8*20070704*M [L.2000C!L.2300]CLM*YOSS0000-5736*200***11:B:1*Y*C*N*Y*P [L.2000C!L.2300]HI*ABK:F941 [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:T1016;TE;HE:..*200*UN*4***1 [L.2000C!L.2300!L.2400]DTP*472*D8*20200901 [L.2000C!L.2300!L.2400]REF*6R*YOSS0000-5736 SE*28*1201 GE*1*1201 IEA*1*000001201</pre>

Monthly Bundling

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:

000026 Cressey, Mireya										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	HS123	FHC	Outgoing	Charge Created	07/17/2020	\$ 1,316.49	\$ 0.00	\$ 1,316.49	\$ 0.00
<input type="checkbox"/>	06/29/2020	TCM	HS123	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 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							<input checked="" type="checkbox"/>	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 checked="" type="checkbox"/>	Charge Created	07/13/2020	10:00 AM	000026 Cressey, Mireya	HS123 Sherwood, Heather	TCM	WIB				
<input checked="" type="checkbox"/>	Charge Created	07/06/2020	10:00 AM	000026 Cressey, Mireya	HS123 Sherwood, Heather	TCM	WIB				

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*A*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
```