NC DSS BILLING ACORN RELEASE NOTES

NC DSS BILLING – VERSION 1.0.9.RELEASE   REQUIRES ECHOVANTAGE VERSION 3.19 OR HIGHER

OVERVIEW

The NC DSS Acorn addresses the custom billing requirements for DSS Services. A custom form, DSS Rates, stores the Monthly Rate for a Client's DSS Services. Start and End Dates are included to maintain multiple Rate records for each Client. If a Service is in the DSS Service Definition List when Processing Services,

- The Acorn looks for all Unprocessed Services for that month.
- The Acorn then calculates the Daily Rate for that month by dividing the Monthly Rate from the Client's form by the number of days in the month or the specified date range if the *End Date* is during the processing month.
- A charge is created for each Service equal to that month's daily rate.
  - If the matching Service is provided every day of the month, the total charges match the monthly charge exactly.
  - If the Client did not receive the Service every day of the month, the Services' total charges are less than the monthly rate.
  - If any DSS Service results in an error during *Charge Creation,* all DSS Services of that type are put on hold until the error is resolved.

INSTALLING THE ACORN

The installation inserts one Acorn Registration, *NC DSS Custom Billing.* The install also creates the *dbo.DSSRates* custom table used by the *DSS Rates* form. This table stores the Monthly Rate for each Client's defined DSS Services.

CONFIGURING THE APPLICATION

Select the Acorn for Applicable Payers

Navigate to *Configuration > Services/Payers > Payers > Processing* and select *NC DSS* in the Acorns drop-down listing on the desired Payers. Remember to select *SAVE.* The Acorn must be defined on a Payer's Processing tab for the DSS Services billing rules to apply during the *Fiscal Overview > Unprocessed Services > Create Charges* process.

Configure the DSS Custom Client Tab

Navigate to *Configuration > Client Chart > Client Tabs* and create a custom tab to hold the DSS form. The tab can be added with any name; the example uses *DSS.* Then add the acorn inserted form, *DSS Rates*, to the newly created custom tab. The form was inserted with the *Client_Tab* Form Location already tagged, so it is immediately available to select from the *+ ADD FORM*. Click HERE for more detailed information on creating and maintaining Custom Client Tabs.
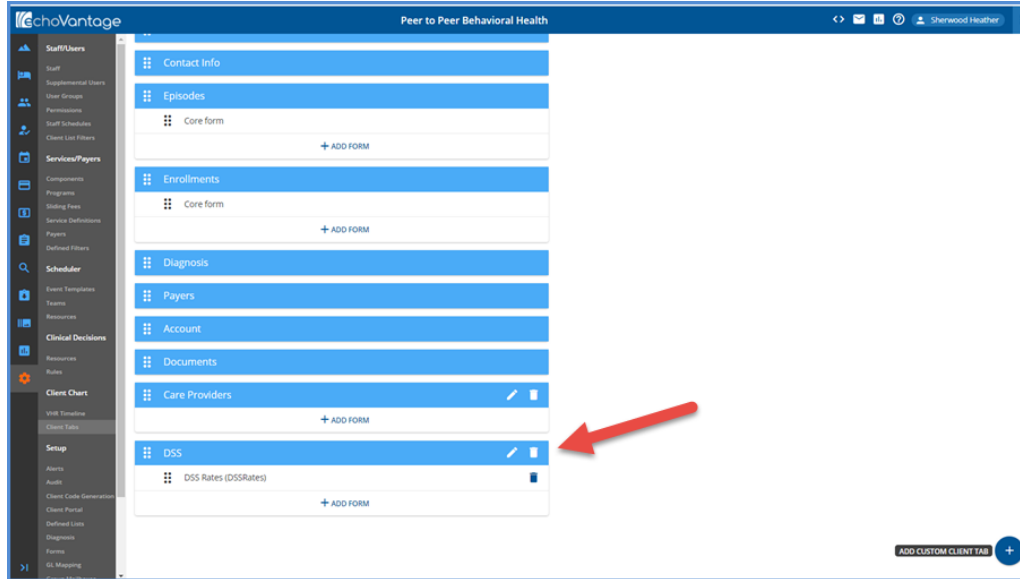
Grant User Group Access to the Newly Created Client Tab

Navigate to *Configuration > Staff/Users > User Groups* and set the *Menu Options* access to the new tab and form for the appropriate User Groups. When a new Client Tab is added, the default menu access is disabled with no form selected for all User Groups. Users responsible for entering and maintaining the DSS Services rate information must be a member of a User Group with *Edit* access to the newly created *DSS* tab. Click Here for more detailed information on *User Group Menu Options Access.*
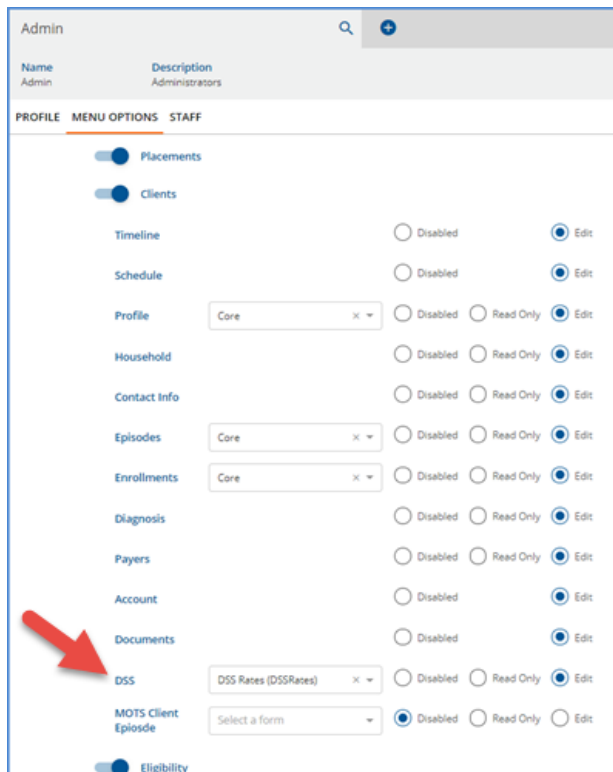
Define the DSS Services and Rates for Clients

For each Client that receives DSS Services, navigate to the *DSS* tab to access the *DSS Rates* form. The records displayed in the grid are limited to the Client currently in focus. Entries on this form for all Clients are stored in the dbo.DSSRates table. Use either the grid navigation tools or the page navigation buttons to add, delete, and update records.

1. **Service Definition** – This drop-down lists the Service Definitions as defined in *Configuration > Services/Payers > Service Definitions.* This field is required.
2. **Rate** – Enter the monthly Rate for the Service Definition. This field is required.
3. **Start Date** – Enter the date that the monthly Rate for this Service Definition begins. This field is optional.
4. **End Date** – Use the End Date to keep a historical record of active dates for a Service Definition and Rate combination. This field is optional.
   - Multiple entries for the same Service Definition are allowed.
   - Use Start and End Dates to handle a mid-month Rate change or plan for future rate changes.
   - Use of the Start and End Dates are recommended if reprocessing a DSS Service could occur.

The DSS Acorn configuration steps are now complete. Services may be entered following the usual workflow.

PROCESSING SERVICES USING THE ACORN

Note: It is assumed that all DSS Services are held and run at the end of the month.

Service processing follows the typical workflow in *Vantage Point > Fiscal Overview > Unprocessed Services > Create Charges.* The Acorn logic is triggered when:

- The Client's primary Payer has *NC DSS Custom Billing* selected in the Payer Processing tab's Acorn field**.**
- A Service in the *Create Charges* job matches a DSS Service Definition (Service and Client in dbo.DSSRates).

When the above criteria are met,

- The Acorn looks for all Services in a Calendar month.
- Then the Daily Rate is calculated for that month by dividing the Monthly Rate from the Client's DSS form by the number of days in the month. For example, when the monthly rate is $250.00 and there are 30 days in the month being processed, the daily rate is $8.33.
- Each Service then receives a charge equal to that month's daily rate.
- If Services are provided every day of the month, the total charges match the monthly rate exactly. If needed, some Services' daily rate is adjusted by pennies to ensure the total matches the monthly rate, as shown in the example below.

The Monthly Rate for this DSS Service is $250.00, there were 30 days in the month, and the Client received Services every day.

TransactionDate	Amount	TransactionDate	Amount
11/1/2020	$8.33	11/16/2020	$8.34
11/2/2020	$8.33	11/17/2020	$8.34
11/3/2020	$8.33	11/18/2020	$8.33
11/4/2020	$8.33	11/19/2020	$8.33
11/5/2020	$8.34	11/20/2020	$8.33
11/6/2020	$8.33	11/21/2020	$8.34
11/7/2020	$8.33	11/22/2020	$8.34
11/8/2020	$8.33	11/23/2020	$8.33
11/9/2020	$8.34	11/24/2020	$8.33
11/10/2020	$8.33	11/25/2020	$8.33
11/11/2020	$8.34	11/26/2020	$8.33
11/12/2020	$8.33	11/27/2020	$8.33
11/13/2020	$8.34	11/28/2020	$8.34
11/14/2020	$8.33	11/29/2020	$8.33
11/15/2020	$8.34	11/30/2020	$8.33

- If the Client did not receive a Service each day of the month, the total charges are less than the full monthly rate. Note in the example below that there are no daily rate "pennies" adjustments.

The monthly rate for this DSS Service is $250.00. There were 30 days in the month, but the Client only received 8 Services.

TransactionDate	Amount
11/14/2020	$8.33
11/21/2020	$8.33
11/26/2020	$8.33
11/27/2020	$8.33
11/28/2020	$8.33
11/29/2020	$8.33
11/30/2020	$8.33
10/31/2020	$8.33

- In the event of a mid-month rate change, the monthly rate is prorated for the effective period. For example, if the monthly rate is $250.00 from 11/01/2020 through 11/15/2020, the monthly rate for these 15 days is $125.00. There are no "pennies" adjustments to any of the daily rate charges.
- If any of a Client's DSS Services has an error during the *Create Charges* process,
    - All Services for that Client are put on hold until the error is corrected.
    - All of a Client's DSS Services must be able to create a charge, to process successfully.
    - If a job containing errors is Finalized, Charges are only created for Clients with error-free DSS Services. The *Held* DSS Services are returned to *Ready* status once Finalizing is complete.
    - The *Unprocessed Services > Errors* tab provides detailed information on processing job errors.

Unprocessed Services » Create Charges

CREATE HISTORY ERRORS

	ERRORS (2)	WARNINGS (0)	INFO (30)				
Service ∨	Program	Location	Client	Staff	Message		SHOW ALL ⋮
11/30/2020 9:00 AM, 60 min - MHC	MH	HOM	AS0000 Ashley, Charlotte	LB123 Bradbard, Louis	Service or bundle on hold due to invalid credentials		
11/29/2020 9:00 AM, 60 min - MHC	MH	HOM	AS0000 Ashley, Charlotte	LB123 Bradbard, Louis	Service or bundle on hold due to invalid credentials		

Start Date   End Date

Client
Start typing to search...

Staff
Start typing to search...