



OK CUSTOM BILLING RELEASE NOTES

OK CUSTOM BILLING – VERSION 2.0.33.RELEASE

REQUIRES ECHOVANTAGE VERSION 3.33 OR HIGHER

DOCUMENT HISTORY

Date	Description	Author	Version
02/03/2022	Initial Release	Heather Sherwood	2.0.33.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
- Reporting additional Rendering Staff on the same claim in Loop 2400 NTE
- Reporting the Contract Source in the HCP segment as
 - HCP01 = '10' (Other)
 - HCP02 = Charge Amount
 - HCP04 is reported based OK Contract Source Form mapping

INSTALLING THE ACORN

The *install-ok-custom-billing-2.0.33.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

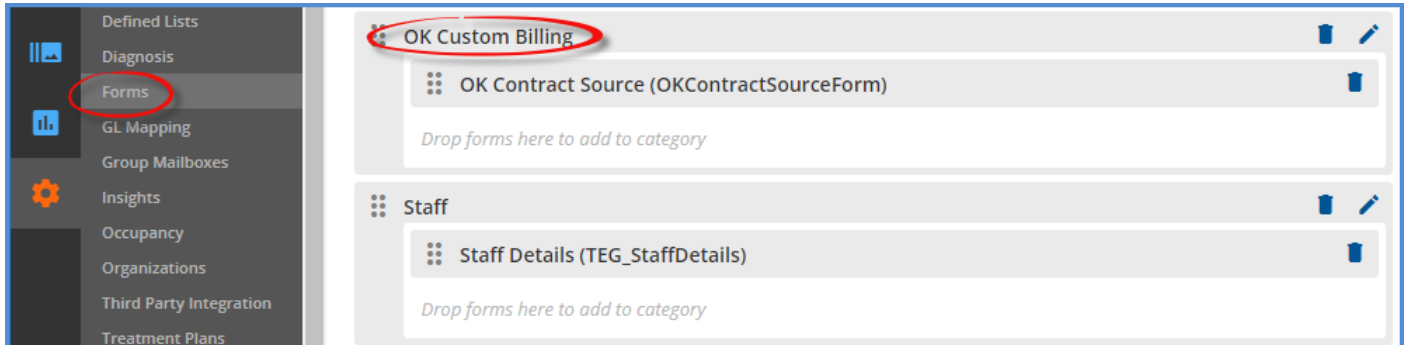
Select the Acorn for the Applicable Payers

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.



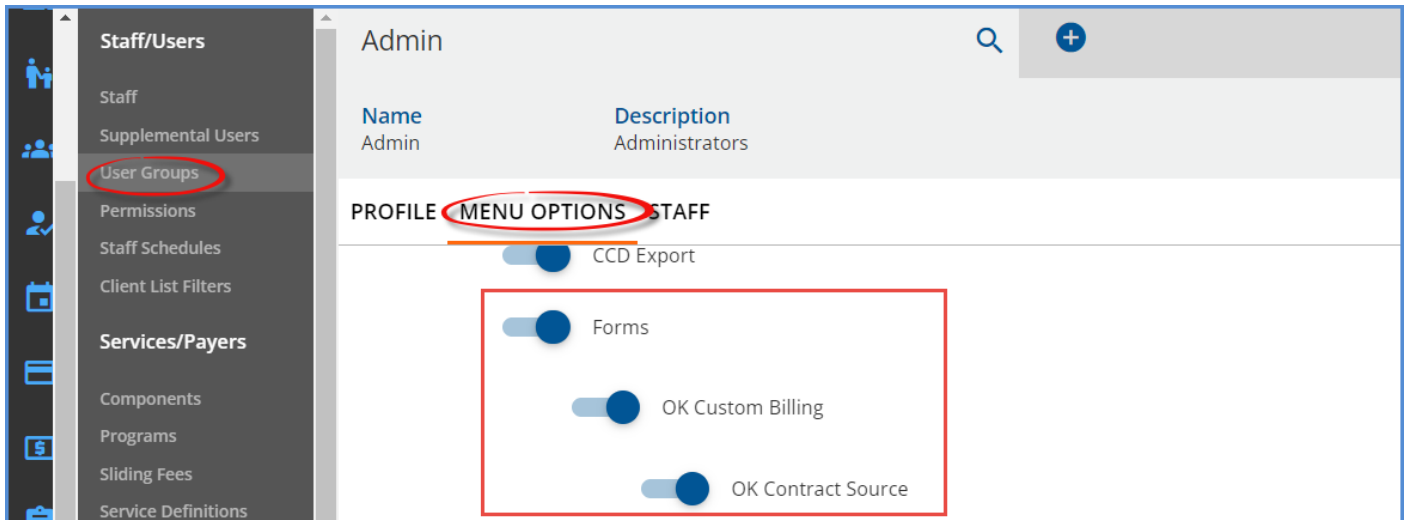
Configure the Custom Mapping Form

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.





Accessing the Custom Mapping Form

After granting menu access, users can navigate to the Forms menu to review, update, or delete the Contract Source mappings.

Location	Program	Activity	ContractSource
Show all	Show all	Show all	Show all
NP01 Noble Perry	ADULT Adult Basic - 01		01AM
OA01 Ottawa Afton	COMH Mental Health Court - 45		45AA
KP03 Kay Blackwell	CW Child Welfare - 47		44AA
PC01 Pawnee Cleveland	SOCW Full Wraparound - 39		39AB
NN02 Nowata Nowata Clinic	SOS Stimulant / Opioid Contract SOS - 12		02BP
PS03 Payne Stillwater Cimarron Call Center	SUD Substance Use Disorder - 02		02AA
KP02 Kay Ponca City Union St	COMPE Competency Eval - 40		42BG
PS01 Payne Stillwater Walnut	GAMB Gambling - 79		70AB
MP01 Mayes Pryor	CW Child Welfare - 47		44AA
OM01 Ottawa Miami	COMH Mental Health Court - 45		45AA
PS01 Payne Stillwater Walnut	ADULT Adult Basic - 01		01AM
CVURC Craig Vinita URC			01AB
RC03 Rogers Claremore Omni	SOS Stimulant / Opioid Contract SOS - 12		02BP
PS03 Payne Stillwater Cimarron Call Center	SOCW Full Wraparound - 39		39AB
KP01 Kay Ponca City 4th St	TANF Temp Assistance for Needy Families - 44		44AB

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[New](#) [Delete](#) [Save](#) [Cancel](#)

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.

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	

The OK Custom Billing Acorn configuration steps are now complete.



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,
 - 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.
 - 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:
 - 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.
 - 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.
 - 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

Program *	Billing Location *	Activity *	Attendance *	Focus
ADULT: Adult Basic - 01	NP01: Noble Perry	ASINT: Assessment-101/110	CMP: Complete	MH: Mental Health
Place of Service *	Tele Provider Locat	Tele Client Locat	Non-Billable	
COMM: Community	CV01: Craig Vinita	CLHO: Client Home	Start typing to search...	

The following row is the matching record in the *OK Contract Source* mapping form.

Location	Program	Activity	ContractSource
NP01 Noble Perry	ADULT Adult Basic - 01		01AM
OA01 Ottawa Afton	COMH Mental Health Court - 45		45AA
KP03 Kay Blackwell	CW Child Welfare - 47		44AA
PC01 Pawnee Cleveland	SOCW Full Wraparound - 39		39AB

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*0000004-31*206.66***53:B:1*Y*A*Y*Y*P
[L.2000C!L.2300]NTE*ADD*OKCODE 038754720
[L.2000C!L.2300]HI*ABK:F3131
[L.2000C!L.2300!L.2310B]NM1*82*1*SHERWOOD*HEATHER
[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*20211210
[L.2000C!L.2300!L.2400]REF*6R*0000004-31
[L.2000C!L.2300!L.2400]HCP*10*103.33**01AM
```

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*.

Service ✓ INDV53-89: Indv Psych 53-89-MH

Program *	Billing Location *	Activity *	Attendance *	Focus
ADULT: Adult Basic - 01	NP01: Noble Perry	INDTH: Individual Psychother...	CMP: Complete	MH: Mental Health
Place of Service *	Tele Provider Locat	Tele Client Locat	Non-Billable	
TELE: Telehealth	Start typing to search...	Start typing to search...	Start typing to search...	

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.

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*, the following error is thrown *Missing Contract Source*.

The screenshot shows the 'Unbilled Charges > Create Bills' interface. It has tabs for 'CREATE', 'HISTORY', and 'ERRORS'. The 'ERRORS' tab is active. A search bar shows '01/28/2022: heather.sherwood - Happy Path 2a'. Below the search bar, there are sections for 'Charges' and 'Errors'. The 'Charges' section has a table with columns: Transaction Date, Payer, Client, Staff, Procedure Code, Info, Warning, and Error. The 'Errors' section has columns: Level and Message. A red arrow points to the message 'Missing Contract Source' in the Errors section.

Transaction Date	Payer	Client	Staff	Procedure Code	Info	Warning	Error
01/22/2022	MCD MEDICAID OKLAHOMA HEALTH CA...	0000004 Client, Heather's		H2027 - HE	1	0	1

Level	Message
ERROR	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 – Programmatic Activity* and the Service provided is *STRNG, EDUCA, CONSU, or SYSU*. A sample of an SQE Service is below.

The screenshot shows the 'Participants' and 'Service' form. The 'Participants' section has dropdowns for Client (PA PROGRAMMATIC ACTIVITY, ACTIVITY, PROGRA), Staff (4KNA), and Supervisor (Start typing to search...). The 'Service' section has a dropdown for Program (ADULT: Adult Basic - 01), Billing Location (RC03: Rogers Claremore Omni), Activity (STRNG: Training-503), Attendance (CMP: Complete), Focus (MH: Mental Health), Place of Service (COMM: Community), Tele Provider Locat (Start typing to search...), Tele Client Locat (Start typing to search...), and Non-Billable (Start typing to search...). A green checkmark is next to 'STRNG: Training-SQE'.

The following highlighted row is the matching record in the *OK Contract Source* mapping form.

Location	Program	Activity	ContractSource	SQE
Rogers	Show all	Show all	Show all	Y
RC02 Rogers Claremore Annex			01AB	Y
RC03 Rogers Claremore Omni			01AB	Y

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*PA-20*.01***53:B:1*Y*A*Y*Y*P
[L.2000C!L.2300]NTE*ADD*OKCODE 740033847
[L.2000C!L.2300]HI*ABK:Z139
[L.2000C!L.2300!L.2310B]NM1*82*1*SHERWOOD*HEATHER
[L.2000C!L.2300!L.2400]LX*1
[L.2000C!L.2300!L.2400]SV1*HC:99368:HE:TG*.01*UN*4***1
[L.2000C!L.2300!L.2400]DTP*472*D8*20220127
[L.2000C!L.2300!L.2400]REF*6R*PA-20
[L.2000C!L.2300!L.2400]HCP*10*0.01**01AB
```



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.

<input type="checkbox"/>	Payer	Service Date	Status	Client	Staff	Service Code	Amount	Procedure Code
<input type="checkbox"/>	MCD - MCD MEDICAID OK...	01/28/2022	Active	0000004 Client, Heather's	4KNA ABRAMS, KATELYN	INDV53-89G	\$ 50.00	90837
<input type="checkbox"/>	MCD - MCD MEDICAID OK...	12/10/2021	Active	0000002 Client, Test2	echoraul Sherwood, Heat...	FAMTP	\$ 88.00	H0004 - HE, HR
<input type="checkbox"/>	MCD - MCD MEDICAID OK...	01/27/2022	Active	0000002 Client, Test2	echoraul Sherwood, Heat...	INDV53-89	\$ 100.00	90837
<input type="checkbox"/>	MCD - MCD MEDICAID OKLAHOMA HEALTH CARE AUTHORITY	01/28/2022	Active	PA PROGRAMMATIC ACTI...	4KNA ABRAMS, KATELYN	EDUCA	\$ 0.01	97537 - HE
<input type="checkbox"/>	MCD - MCD MEDICAID OK...	01/28/2022	Active	PA PROGRAMMATIC ACTI...	4KNA ABRAMS, KATELYN	TestA	\$ 99.00	test
<input type="checkbox"/>	MCD - MCD MEDICAID OK...	01/22/2022	Active	0000004 Client, Heather's	4KNA ABRAMS, KATELYN	INDV53-89G	\$ 50.00	90837
<input type="checkbox"/>	MCD - MCD MEDICAID OK...	01/22/2022	Active	0000004 Client, Heather's	ZZTA ACTOUKA, ZAKARY	NUTRA	\$ 100.68	H2027 - HE
<input type="checkbox"/>	MCD - MCD MEDICAID OK...	01/20/2022	Active	PA PROGRAMMATIC ACTI...	4KNA ABRAMS, KATELYN	TestA	\$ 99.00	test
<input type="checkbox"/>	MCD - MCD MEDICAID OK...	01/15/2022	Active	0000004 Client, Heather's	echoraul Sherwood, Heat...	CONSU	\$ 0.01	99368 - HE, TG
<input type="checkbox"/>	MCD - MCD MEDICAID OK...	01/12/2022	Active	0000002 Client, Test2	ZZTA ACTOUKA, ZAKARY	NUTRA	\$ 100.68	H2027 - HE
<input type="checkbox"/>	MCD - MCD MEDICAID OK...	01/11/2022	Active	0000004 Client, Heather's	3BNA ADAMS, BRANDY	ASINT	\$ 103.33	H0031 - HE
<input type="checkbox"/>	MCD - MCD MEDICAID OK...	01/10/2022	Active	0000004 Client, Heather's	echoraul Sherwood, Heat...	ASINT	\$ 103.33	H0031 - HE
<input type="checkbox"/>	MCD - MCD MEDICAID OK...	01/05/2022	Active	0000004 Client, Heather's	3BNA ADAMS, BRANDY	INDV53-89	\$ 100.00	90837 - GT
<input type="checkbox"/>	MCD - MCD MEDICAID OK...	12/31/2021	Active	0000004 Client, Heather's	4KNA ABRAMS, KATELYN	ASINT	\$ 90.41	H0031 - HE
<input type="checkbox"/>	MCD - MCD MEDICAID OK...	12/31/2021	Active	0000004 Client, Heather's	echoraul Sherwood, Heat...	ASINT	\$ 103.33	H0031 - HE

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.

<input type="checkbox"/>	Payer	Service Date	Status	Client	Staff	Service Code	Amount	Procedure Code
<input type="checkbox"/>	MCD - MCD MEDICAID OK...	01/28/2022	Active	0000004 Client, Heather's	4KNA ABRAMS, KATELYN	INDV53-89G	\$ 50.00	90837
<input type="checkbox"/>	MCD - MCD MEDICAID OK...	12/10/2021	Active	0000002 Client, Test2	echoraul Sherwood, Heat...	FAMTP	\$ 88.00	H0004 - HE, HR
<input type="checkbox"/>	MCD - MCD MEDICAID OK...	01/27/2022	Active	0000002 Client, Test2	echoraul Sherwood, Heat...	INDV53-89	\$ 100.00	90837
<input type="checkbox"/>	MCD - MCD MEDICAID OK...	01/31/2022	Batched	PA PROGRAMMATIC ACTI...	4KNA ABRAMS, KATELYN	EDUCA	\$ 0.01	97537 - HE
<input type="checkbox"/>	MCD - MCD MEDICAID OK...	01/28/2022	Hold	PA PROGRAMMATIC ACTI...	4KNA ABRAMS, KATELYN	TestA	\$ 99.00	test
<input type="checkbox"/>	MCD - MCD MEDICAID OK...	01/27/2022	Batched	0000004 Client, Heather's	4KNA ABRAMS, KATELYN	INDV53-89G	\$ 50.00	90837
<input type="checkbox"/>	MCD - MCD MEDICAID OK...	01/22/2022	Hold	0000004 Client, Heather's	ZZTA ACTOUKA, ZAKARY	NUTRA	\$ 100.68	H2027 - HE
<input type="checkbox"/>	MCD - MCD MEDICAID OK...	01/20/2022	Hold	PA PROGRAMMATIC ACTI...	4KNA ABRAMS, KATELYN	TestA	\$ 99.00	test
<input type="checkbox"/>	MCD - MCD MEDICAID OK...	01/15/2022	Batched	0000004 Client, Heather's	echoraul Sherwood, Heat...	CONSU	\$ 0.01	99368 - HE, TG
<input type="checkbox"/>	MCD - MCD MEDICAID OK...	01/12/2022	Batched	0000002 Client, Test2	ZZTA ACTOUKA, ZAKARY	NUTRA	\$ 100.68	H2027 - HE
<input type="checkbox"/>	MCD - MCD MEDICAID OK...	01/11/2022	Batched	0000004 Client, Heather's	3BNA ADAMS, BRANDY	ASINT	\$ 103.33	H0031 - HE
<input type="checkbox"/>	MCD - MCD MEDICAID OK...	01/10/2022	Batched	0000004 Client, Heather's	echoraul Sherwood, Heat...	ASINT	\$ 103.33	H0031 - HE
<input type="checkbox"/>	MCD - MCD MEDICAID OK...	01/05/2022	Hold	0000004 Client, Heather's	3BNA ADAMS, BRANDY	INDV53-89	\$ 100.00	90837 - GT
<input type="checkbox"/>	MCD - MCD MEDICAID OK...	12/31/2021	Batched	0000004 Client, Heather's	4KNA ABRAMS, KATELYN	ASINT	\$ 90.41	H0031 - HE
<input type="checkbox"/>	MCD - MCD MEDICAID OK...	12/10/2021	Batched	0000004 Client, Heather's	echoraul Sherwood, Heat...	ASINT	\$ 103.33	H0031 - HE

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.

Date	Payers	Status	Created By	Message	Amount	Errors
01/31/2022	MCD - MCD MEDICAID OKLAHOMA HEA...	Preview	heather.sherwood	MCD Secondary Charges	0	