



RI IHH/ACT ACORN RELEASE NOTES

INSTALL-RI-CUSTOM-BILLING-2.0.125.RELEASE.SQL

REQUIRES ECHOVANTAGE VERSION 3.31 OR HIGHER

DOCUMENT HISTORY

Date	Description	Author	Version
02/04/2021	Rel. of RI Custom Billing V2	Heather Sherwood	1.0.44
03/12/2021	Do not report rendering provider for shadow claims	Heather Sherwood	1.0.52
04/02/2021	Updated IHH/ACT population script for each agency	Heather Sherwood	1.0.54
06/09/2021	Updated to work with new interface. No functional changes to Acorn	Heather Sherwood	1.0.56
08/20/2021	V4 – change to Per Diem in place of bundles	Heather Sherwood	2.0.37
01/20/2022	Updated Per Diem Customization to handle two separately active Medicaid Client Payers in a single month	Heather Sherwood	2.0.47
04/05/2022	Updated how the Acorn determines the reported staff person for the Per Diem charge when no sub-program is mapped.	Heather Sherwood	2.0.49
05/06/2022	Click HERE for more information on the following updates. <ul style="list-style-type: none"> • Use of StaticValues for Sub-program component IDs • Better PerDiem date reporting around hospitalization and incarceration periods • Custom Billing form sets shadow service to <i>DONE</i> if PerDiem already exists • Option to Reverse just PerDiems that have errors • Error Messages are cleaned up when a PerDiem Charge is reversed 	Heather Sherwood	2.0.64
07/20/2022	Updated the Acorn to accommodate multiple programs attached to the IHH/ACT Per Diem Service Definitions. EV-4353	Heather Sherwood	2.0.83
08/16/2022	Bug Fixes EV-4624 (IHH/ACT changes)	Heather Sherwood	2.0.103
09/07/2022	IHH/ACT improvements EV-4657 and EV-4672 Plus a Thrive only update EV-4671	Heather Sherwood	2.0.108
09/23/2022	Version bump due to changes to Staff Credential Modifier	Heather Sherwood	2.0.125



OVERVIEW

The RI Custom Billing Acorn addresses state-specific billing requirements for ACT (Assertive Community Treatment) and IHH (Integrated Health Home) program services. Custom forms in the *Forms* main menu flag Medicaid Payers as MCO, create Per Diem Charges, and reverse Per Diem Charges. The 837P is created per the typical workflow in *Fiscal Overview > Unbilled Charges*.

This release updates the Acorn to split the Per Diem when the policy number changes (not just the Payer), and checks for an existing IHH or ACT Per Diem charge before creating a new IHH or ACT Per Diem charge. There is also a new stored procedure that updates the Service SubProgram to the matching Enrollment Program if it differs. The matching Enrollment is the one that is active as of the date of service, and has the same Program as the Service Program component. This new stored procedure is added to the database, and then the `dbo.sp_RI_MarkServicesAsReady` is updated to call the new stored procedure.

INSTALLATION & SETUP OF IHH/ACT ACORN

Installing the Acorn Script (Completed by Echo)

The `install-ri-custom-billing-2.0.125.RELEASE.sql` installation script creates the following three records in the `dbo.AcornRegistrations` table and also updates the RIHealthHomes Acorn version in the *Help > About* page.

- RI 837P Customization
- RI Per Diem Customization
- *RI Staff Credential Modifier* - Please see the *RI Staff Credential Modifier Release Notes* for detailed information on configuring and using this Charge Customization Acorn type.

Installing the Data Population Script (Completed by Echo)

The Data Population Script inserts values into the `dbo.RICustomServiceDefinitions`, `dbo.RICustomAcornPrograms`, `dbo.RICustomAcornSubPrograms`, `dbo.RICustomReportingStaff`, and `dbo.RIPerDiemDefinitions` tables if empty. The IHH and ACT Per Diem Service Definitions must be created before the installation. The data population script uses the following ids specifically:

- 202107150340044910573041D703F4154B95 for the IHH Per Diem Service Definition
- 20210715034126193EAFD20CE963E4B818EA for the ACT Per Diem Service Definition

In addition,

- The individual Services defined in the Bundled Service Definitions are removed from the *H0037 Integrated Health Home* and the *H0040 Assertive Community TX* Bundled Service Definitions
- The new IHH and ACT Service Definitions are marked as *Not billable to most payers*
- And the `dbo.RICustomBundles` table is removed

The Configuration & Maintenance section at the end of this document provides additional information on the tables, views, and populated data installed or updated by each script.

CONFIGURING THE APPLICATION

Overriding the IHH/ACT Per Diem Service Definitions for Medicaid Payers

The IHH/ACT Per Diem Service Definitions are not billable by default. This change may be verified in the Charge Calculation Method field in *Configuration > Services/Payers > Service Definitions > Rates*. The IHH/ACT Per Diem Service Definitions are configured as not billable by default to prevent the creation of Per Diem Charges for non-Medicaid Payers in error.

For each Medicaid Payer (the list of Medicaid Payers can be found on the RI Medicaid Payers form or by running the SQL query listed below), the Service Definition default rate must be overridden **to be billable**.

To identify Medicaid Payers via the database, execute the following query.

```
Select Name from Payers where Category ='2020051412360015731580C69C8A441C4A83'
```

To override the Service Definition default rate,

- Navigate to *Configuration > Services/Payers > Payers > Rates*
- Select one of the IHH/ACT Per Diem Service Definitions
 - *PD Integrated Health Home (PDIHH)* or *PD Assertive Community Tx (PDZACT)* for Thrive
 - *H0037 IHH Per Diem (IHHPD)* or *H0040 ACT Per Diem (ACTPD)* for Newport
- Then select the blue **VERRIDE SERVICE DEFINITION DEFAULT** button **if the Payer Rate is not already defined**.
- Select *Unit Per Day* in the **Charge Calculation Method** dropdown box



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

Per IHH Per Diem (PDIHH) NEW VERSION ▾

Calculations

Charge Calculation Method *
Unit Per Day

Start Date
12/01/2021 End Date

Requires Authorization

Rates

Service Definition Base Rate
0

Payer Rates *

Credential	Base Rate *	Contracted Rate *	Start Date	End Date
Credentials	\$ 13.82	\$ 13.82		

COPY RATE TO OTHER PAYERS DELETE ? CANCEL SAVE

- Enter the Rate information for that Payer and remember to select **SAVE** to record the changes
- Select the second Per Diem Service Definition and repeat the process to make it billable for the current Payer

Repeat the steps above for ALL Medicaid Payers.

Custom Forms in the Forms Menu

After a new installation, Navigate to *Configuration > Setup > Forms*

- Add a Category – A *Custom Billing* Category was created in the example below.
- Add the Acorn installed Custom Forms to the new Category. These custom forms have the *MENU* Form Location, so they are immediately available to select in the *Add Forms* list.
 - RICustomBilling
 - RIMedicaidPayers

****NOTE**** The RIMarkServicesAsReady is an agency custom form created to help ensure the completeness of IHH/ACT Services before updating the Status to *Ready*. While this is not part of the Acorn itself, Ready Services are required before billing with the Acorn.

Client Labs

Setup

- Alerts
- Audit
- Client Code Generation
- Defined Lists
- Diagnosis
- Forms

Custom Billing

- Mark as Ready Button (RI_MarkServicesAsReady)
- RI Custom Billing (RICustomBilling)
- RI Medicaid Payers (RIMedicaidPayers)

Drop forms here to add to category

- Navigate to *Configuration > Staff/Users > Staff > User Groups*
- Select the User Group that should have access to the form
- Select Menu Options
- Toggle the form on
- Save and **Repeat for any other User Groups that should have access**



Billing Admin

Name: Billing Admin | Description: Billing Administrators

PROFILE | **MENU OPTIONS** | STAFF

- Templates
- TEG_ServiceTemplates
- Custom Billing**
- Mark Services as Ready
- RI Custom Billing
- RI Medicaid Payers

- Navigate to the *Forms* main menu to verify that the Forms display correctly.

After upgrading, navigate to the Forms main menu to verify that the previously installed forms display correctly. Verify that the RI Custom Staff Mapping Form is no longer displayed. Review the data in the existing forms to ensure nothing is missing or in error.

Medicaid Payers

Is MCO: No

Payer	MCO
FREE CARE	N
NHP RITECARE OPTUM	Y
DBH CONTRACT TITLE XX	N
MEDICAID	N
NHP RHP OPTUM	Y
RI-MEDICAID KIDS	N
UBH-RITECARE	Y
NHP OPTUM INTEGRITY	Y
MEDICAID FLEX	N
TUFTS MEDICAID EXPANSION	Y
UBH-RHP	Y

Save Cancel



Indicating the Medicaid MCOs

Use the *RI Medicaid Payers* form in the *Forms* main menu to indicate which Payers are Managed Care Organizations. The Acorn only works with the Medicaid Category provided by default in EchoVantage as the Acorn references an internal ID for the Medicaid Category, not the label. The Payers list on the *RI Medicaid Payers* form is pulled from the Payers column of the *RICustommedicaidPayers* table. The data population script populates this table with the Payers with the default Medicaid Category assigned. By default, the MCO value is set to 'N.'

Payer	MCO
Show all	Show all
LHV-EAP	N
OPTUM-ADLT	Y
UBH-RITECARE	Y
OPTUM-RHO	Y
MEDICAID-ADLT	N
FLEX	N
ZZGENERAL PUBLIC ASSISTANCE	N
TITLE 20 GRANT	N
OPTUM-INTEGRITY	Y
TUFTS-MCAID	Y
MEDICAID-SPMI	N

Is MCO dropdown menu: Yes (selected), Yes (clickable)

Buttons: Save, Cancel

To set a Payer’s MCO value to ‘Y’ to indicate that it is a Managed Care Organization,

- Click on the desired Payer to highlight
- Click on the down arrow in the *Is MCO* dropdown box
- Select ‘Yes’
- Click on the now enabled blue *SAVE* (bottom left) to record your changes
- To exit edit mode without recording any changes, select *CANCEL*

Enabling the Acorn for Medicaid Payers

Assign the Acorn to all Payers with the Medicaid Category – the list of Payers on the *RI Medicaid Payers* form, above

- Navigate to *Configuration > Services/Payers > Payers > Processing* tab
 - Choose the *RI Per Diem Customization* and the *RI Staff Credential Modifier* options in the **Acorns** dropdown listing
 - Select *SAVE* to record the changes
 - Like the image below, both options should display

Configuration > Services/Payers > Payers > Processing

Acorns dropdown menu:

- × RI Staff Credential Modifier
- × RI Per Diem Customization

Buttons: CANCEL, SAVE

- Next, navigate to the Payer’s *Billing Methods* tab



- Select the 837 Professional option
- Validate that the “RI 837P Customization” option is selected in the Acorns dropdown

PROFILE COMMUNICATIONS PROCESSING RATES BILLING METHODS PAYER MAPPINGS ELIGIBILITY POS MAPPINGS

837 Professional
CMS-1500 Paper
837 Institutional
UB-04 Paper

Header

Acorns
RI 837P Customization

Submitter Name (Loop 1000A, NM103)
P2P Behavioral Health

Authorization Info (ISA02)
00

Submitter Id Code (Loop 1000A, NM109)
160003818

Security Information (ISA04)

Submitter Contact (Loop 1000A, PER02)

- Confirm that the “Report Staff” and “Report Staff Taxonomy” options are checked for the Payer
- Select *SAVE* to record the changes, if any

Report Staff (Loop 2310B)

Defined Filter

Billing - Medicaid rendering

Billing - Monthly IHH Fee For Service BILLING - WEEKLY

Billing - Monthly Fee For Service

Report Staff Taxonomy (Loop 2310B, PRV)

Provider Signature on File (CLM06)

Report Referring Provider (Loop 2310A)

Provider Accepts Assignment (CLM07)

Assignment of Benefits Indicator (CLM08)

Payer Accepts Corrected Claims



BILLING WITH THE ACORN

Once the configuration steps outlined above are complete and IHH/ACT Services are marked as *READY*, the application is ready to begin billing with the Acorn. Some Fiscal processes must be initiated from the custom billing form, while others use core Fiscal Overview functions - the recommended billing workflow is outlined below. The following *READY* Services are used in the billing job example below.

Start Date	End Date	Client	Staff	Supervisor	Defined Filter	Status	
12/01/2021		289345 Cli...	Select Staff...	Select Supervis...	Select Defined ...	Not Ready Ready	SEARCH
✓ MARK READY		✗ DELETE		✓ BULK ACTIONS			
✓	Status	Date	Client	Staff	Service Code	Program	
	Ready	12/28/2021 10:00 AM 45 min	289345 Client, Act2	1002 Abrams, Ronald	CASEVOCACT	HT	
	Ready	12/24/2021 9:00 AM 40 min	289345 Client, Act2	1002 Abrams, Ronald	VOCASMTACT	HT	
	Ready	12/21/2021 9:00 AM 10 min	289345 Client, Act2	2099 Addy, Stephen	NBNURCO	HT	
	Ready	12/17/2021 1:00 PM 45 min	289345 Client, Act2	1002 Abrams, Ronald	TXIND45ACT	HT	
	Ready	12/16/2021 2:00 PM 30 min	289345 Client, Act2	1002 Abrams, Ronald	OUTIHHACT	HT	
	Ready	12/14/2021 9:00 AM 30 min	289345 Client, Act2	1002 Abrams, Ronald	CASEVOCACT	HT	
	Ready	12/10/2021 10:00 AM 15 min	289345 Client, Act2	1842 Adams, Christine	NBNURCO	HT	
	Ready	12/03/2021 9:00 AM 45 min	289345 Client, Act2	1002 Abrams, Ronald	CMNDIHHACT	HT	
	Ready	12/02/2021 9:00 AM 30 min	289345 Client, Act2	1002 Abrams, Ronald	EM2ACT	HT	

Creating Charges

Unlike most billing jobs, which start in Fiscal Overview, the IHH/ACT billing jobs start from the RI Custom Billing form in the Form's menu. Select the Month, enter the Year, and optionally specify a client. Leave the **Client** blank to create charges for all IHH/ACT Clients with Services. Once entered, select the blue *Create Charges* button.

RI Custom Billing

Charge Creation

Month: 12 December Year: 2021

Client: 289345 Act2 Test Client

[Create Charges](#)

When *Create Charges* is selected on the custom billing form, the `dbo.usp_RI_Acorn_Services_To_Job` stored procedure starts the job, which is then visible on the Fiscal Overview > Unprocessed Services > History tab.

Date	Status	Created By	Message	Services	Errors	
12/29/2021	Preview		IHH and ACT Charge Creation - December - For Client 289345 - RunDate: 12/29/...	1	0	FINALIZE

Service Date	Client	Duration/Units	Payer	Procedure Code	Billed Units	Charge Amount	Balance
12/01/2021 - 12/31/2021	289345 Client, Act2 Test		MEDICAID-ADLT	H0040	31	\$ 1,291.15	\$ 1,291.15

- A single Per Diem Charge is created – the Client has one Payer and no hospitalizations or incarcerations.



- Errors can be found on the adjacent Errors tab and should be reviewed before finalizing the job.
- In this version of the Acorn, an IHH/ACT *Create Charges* job can be retried from the *Unprocessed Services > History* tab because the Acorn marks the individual Services as Done and creates the 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 to change the Services linked to the Per Diem Charge(s).
- Reversing an IHH/ACT *Create Charges* job must be performed from the RI Custom Billing Form. This form has a new section, *Reverse Per Diem*, which can successfully reverse the Acorn created Per Diem Charge(s) and reset the *DONE* Services back to a *READY* status.
- Select the blue FINALIZE button to complete the charge creation process when satisfied with all the created charges.



A specific workflow is required to successfully reverse an Acorn created Per Diem Charge. Please refer to the [Functional Overview > Reversing Per Diem Charges section](#) below for complete information and detailed steps.

Creating Bills

The creation of the 837P now takes place in the core *Fiscal Overview* function *Unbilled Charges*. References to the 837P were removed from the *RI Custom Billing Form*. Provided *RI 837P Customization* is specified in the **Acorns** field of the 837P for each Medicaid Payer and the Payer mapping settings are correct,

- The custom logic for reporting staff, using the values in `dbo.RICustomReportingStaff`, is used during the 837-file creation.
- If a Payer is flagged as MCO in the Medicaid Payers mapping form, Staff is not reported in the 837P.
- If the Acorn creates the Per Diem Charge, the individual Services are reported as detailed SV1 lines.

837 for Acorn Created Per Diem Charges

```
NM1*PR*2*MEDICAID-ADLT*****PI*056000522
CLM*289345-110811*1291.15***11:B:1*Y*A*Y*Y*P
HI*ABK:F2081
NM1*82*1*STAFFER*JOE*J***XX*1159999999
PRV*PE*PXC*1041C0700X
```

The total Per Diem Charge (Claim) Amount is \$1,291.15.

The Staff is reported because Medicaid is not an MCO Payer.

```
LX*1
SV1*HC:H0040*1291.15*UN*31***1
DTP*472*RD8*20211201-20211231
REF*6R*289345-110811
```

In LX*1, the first SV1 line shows the Per Diem Charge of \$1,291.15 with the Services date range, 12/01/2021-12/31/2021.

```
LX*2
SV1*HC:99212*0*UN*1***1
DTP*472*D8*20211202
```

The nine individual Service details are listed in LX*2 through LX*10. These detail lines do not have a billed amount but include the Service-specific billing code, unit, modifier, and Service date.

```
LX*3
SV1*HC:H0036*0*UN*1***1
DTP*472*D8*20211203
```

```
LX*4
SV1*HC:T1016*0*UN*1***1
DTP*472*D8*20211210
```

```
LX*5
SV1*HC:H2023*0*UN*1***1
DTP*472*D8*20211214
```

```
LX*6
SV1*HC:T1016*0*UN*1***1
DTP*472*D8*20211216
```

```
LX*7
SV1*HC:90834*0*UN*1***1
DTP*472*D8*20211217
```

```
LX*8
SV1*HC:T1016*0*UN*1***1
DTP*472*D8*20211221
```

```
LX*9
SV1*HC:H2023*0*UN*1***1
DTP*472*D8*20211224
```

```
LX*10
SV1*HC:H2023*0*UN*1***1
DTP*472*D8*20211228
```




Click here for Echo's Fiscal Overview webhelp to find more information on troubleshooting errors in the Fiscal Overview > Unprocessed Services tabs and creating bills in the Unbilled Charges tabs.

FUNCTIONAL OVERVIEW

Calculating the Per Diem Charges

Ready IHH and ACT eligible Services are included in the Create Charges job if

- The service falls in the date range entered (Month and Year).
The Service Program matches an open IHH or ACT Client Enrollment Program.
The Service SubProgram is an IHH or ACT SubProgram.
The IHH and ACT Per Diem Service Definitions' minimum requirements are satisfied.
Minimum Minutes: IHH = No Min., ACT = 15
Minimum Services: IHH = 1, ACT = 1
Minimum Service Duration: IHH = No Min., ACT = 15
A Per Diem Charge for the same Client, Month, and Year does not already exist.

Ready IHH and ACT eligible Services are NOT included in the Create Charges job if

- A Per Diem Charge already exists for that Client, Month, and Year - the Service Status is updated to DONE.
The Per Diem minimums are not met - the Service is Placed on Hold.
The service was provided on a day the Client was hospitalized or incarcerated, ACT Only - the service is set to DONE, and the day(s) is(are) excluded from the Per Diem date range.
If the stay (hospitalization or incarceration) is mid-month, the Acorn creates two Per Diem Charges around the stay.
For example, suppose a Client is hospitalized from 6/6 to 6/9 and receives ACT eligible Services in June outside of the hospitalization period that satisfy the minimum requirement. In that case, the Acorn creates two Per Diem Charges. The first is dated 6/1-6/5, and the second is 6/9-6/30.
The Per Diem date range is adjusted if the period includes the month's beginning or end.
For example, suppose a Client is hospitalized from 5/29 to 6/7 and receives ACT eligible Services in June outside of the hospitalization period that satisfy the minimum requirement. In that case, the Acorn creates one Per Diem Charge dated 6/7-6/30.
Note that the Discharge Date is billable for hospitalizations.

Once the Service date range is established, the Per Diem Charge is calculated based on the rate and units. For Per Diem Charges, the Charge Calculation method is Unit Per Day. For example, if the ACT Per Diem Service Definition minimums were satisfied in June and there are no days excluded due to a hospitalization or incarceration, the Charge is \$1,249.50 (\$41.65x30).

The example below shows two ACT Per Diem Charges due to a mid-month hospitalization.

Table with 8 columns: Service Date, Client, Duration/Units, Payer, Procedure Code, Billed Units, Charge Amount, Balance. It shows two rows of charges for a client named Frank Spencer, one for 5 units and one for 22 units.

- 6/1-6/5 is five days, so five units x \$41.65 for a Charge Amount of \$208.25
6/9-6/30 is 22 days, so 22 units x \$41.65 for a Charge Amount of \$916.30
If a client is admitted and discharged on the same day (hospitalization or incarceration), the Per Diem charge is no longer split.



Hospitalization and Incarceration Periods

The *VRIClientStays* view is created by the Acorn and used to determine hospitalization and incarceration days where Client Services should not be billed. The three columns of the view are populated with the following column values from the *RI_HospitalAdmissions* and the *RI_LegalTracker* tables.

VRIClientStays	Client	AdmissionDate	DischargeDate	Where
RI_HospitalAdmissions	Client	VHRStartDate	DischargeDate	AdmissionType is NOT ER-MED, ER-PSYCH, or SAHS
RI_LegalTracker	Client	VHRStartDate	VHREndDate	Legallncarc IS Incarcerated

The excluded values for hospitalizations are now stored in *dbo.StaticValues* rather than the Acorn. The PropertyKey is *EXCLUDED_HOSPITAL_VALUES* and the PropertyValue contains the excluded Admission Types (*ER-MED, ER-PSYCH, SAHS, and/or Emergency Visits*). This change accommodates different excluded values per agency. In addition, changes in the excluded values will no longer require an update to the Acorn.

Changing Enrollments Mid-Month

If a Client switches between two different enrollments (ACT to IHH or IHH to ACT) in a single month, each with a qualifying IHH/ACT sub-program, multiple Per Diem Charges are created – one for each Enrollment.

Client Payer or Policy Number Changes Mid-Month

The Acorn is designed to create Per Diem charges for IHH/ACT Services for **up to two Client Medicaid Payers** that are separately active during a single month. **The active date range for these Medicaid Payers cannot overlap. If there is a date range overlap, the Acorn selects only one Payer for the entire month and the Per Diem charge is not split.**

For example, the IHH Test Client has the following Payers.

Medicaid was active until 12/10/2021, and NHP Optum became active on 12/11/2021.

MARK READY	DELETE							BULK ACTIONS
Status	Date	Client	Staff	Service Code	Program			
Done	12/21/2021 11:00 AM 15 min	289344 Client, IHH	2517 Ackerman, Brian	NBNURCO	CSP			
Charge Created	12/11/2021 - 12/31/2021 21 units	289344 Client, IHH	2615 Kelly, Catherine	PDIHH	CSP			
Done	12/11/2021 11:00 AM 60 min	289344 Client, IHH	1002 Abrams, Ronald	CMNDIHHACT	CSP			
Done	12/07/2021 9:00 AM 60 min	289344 Client, IHH	1002 Abrams, Ronald	CMNDIHHACT	CSP			
Charge Created	12/01/2021 - 12/10/2021 10 units	289344 Client, IHH	2615 Kelly, Catherine	PDIHH	CSP			
Done	12/01/2021 9:00 AM 60 min	289344 Client, IHH	1002 Abrams, Ronald	CMNDIHHACT	CSP			



Four IHH Services were provided in December, and the *RI Custom Billing* form was used to create a Per Diem Charge. (The view above is from the Services screen.)

Unprocessed Services » Create Charges ✕

CREATE HISTORY ERRORS

Start Date: 12/28/2021 End Date: User: Status:

Date	Status	Created By	Message	Services	Errors	
12/28/2021	Preview		IHH and ACT Charge Creation - December - For Client 289344 - RunDate: 1...	2	0	<input type="button" value="FINALIZE"/>
12/28/2021	Done		IHH and ACT Charge Creation - December - For Client 289343 - RunDate: 1...	2	0	

< > 1 of 1

Details ✕

Service Date	Client	Duration/Units	Payer	Procedure Code	Billed Units	Charge Amount	Balance
12/11/2021 - 12/31/2021	289344 Client, IHH Test		OPTUM-ADLT	H0037	21	\$ 290.22	\$ 290.22
12/01/2021 - 12/10/2021	289344 Client, IHH Test		MEDICAID-ADLT	H0037	10	\$ 138.20	\$ 138.20

Two Per Diem Charges are created for December, one for Medicaid and one for Optum.

These charges can then be Finalized and included in a *Create Bills* job. The 837 files for each Payer contain the appropriate Per Diem and Shadow Service detail lines, highlighted below. Payer Optum is a Medicaid MCO, so the Staff Name and Taxonomy are not reported.

Medicaid	Optum
<p>NM1*PR*2*MEDICAID-ADLT*****PI*056000522 CLM*289344-110804*138.2***11:B:1*Y*A*Y*Y*P HI*ABK:F3110 NM1*82*1*STAFFER*JOE*J****XX*1159999999 PRV*PE*PXC*1041C0700X LX*1 SV1*HC:H0037*138.2*UN*10***1 DTP*472*RD8*20211201-20211210 REF*6R*289344-110804 LX*2 SV1*HC:H0036*0*UN*1***1 DTP*472*D8*20211201 LX*3 SV1*HC:H0036*0*UN*1***1 DTP*472*D8*20211207</p>	<p>NM1*PR*2*OPTUM-ADLT*****PI*87726 CLM*289344-110805*290.22***11>B>1*Y*A*Y*Y*P HI*ABK>F3110 LX*1 SV1*HC>H0037*290.22*UN*21***1 DTP*472*RD8*20211211-20211231 REF*6R*289344-110805 LX*2 SV1*HC>H0036*0*UN*1***1 DTP*472*D8*20211211 LX*3 SV1*HC>T1016*0*UN*1***1 DTP*472*D8*20211221</p>

The Acorn also splits the Per Diem charge when the Payer Policy Number changes mid-month. For example, a client has the following Payer information for July 2022.

<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <p>OPTUM-ADLT (OPTUM-ADLT) Policy Number: 456 07/16/2022 - 08/13/2022</p> </div> <div style="border: 1px solid #ccc; padding: 5px;"> <p>OPTUM-ADLT (OPTUM-ADLT) Policy Number: 123 01/01/2022 - 07/15/2022</p> </div>	<ul style="list-style-type: none"> Optum, Policy Number 123 effective 01/01/2022 – 07/15/2022 Optum, Policy Number 456 effective 07/16/2022 – 08/13/2022
--	--



The following ACT services are provided for the client in July.

✓ MARK READY		✗ DELETE						✓ BULK ACTIONS	
✓	Status	Date	Client	Staff	Service Code	Program			
✓	Ready	07/28/2022 9:00 AM 60 min	290133 Client, Act	1002	EMZACT	CSP	✓		
	Ready	07/21/2022 9:00 AM 60 min	290133 Client, Act	1842	CMNDIHHACT	CSP	✓		
	Ready	07/14/2022 9:00 AM 60 min	290133 Client, Act	2517	CMNDIHHACT	CSP	✓		
	Ready	07/07/2022 9:00 AM 60 min	290133 Client, Act	1842	TXIND60ACT	CSP	✓		
	Ready	07/03/2022 9:00 AM 60 min	290133 Client, Act	1842	VOCASMTACT	CSP	✓		

The Acorn create charges process results in two Per Diems based on the *Client Payer Effective Dates* entered in EchoVantage.

Service Date	Client	Duration/Units	Payer	Procedure Code	Billed Units	Charge	Balance	Message	DOWNLOAD CSV
07/16/2022 - 07/31/2022	290133 Client, Act		OPTUM-ADLT	H0040	16	\$ 666.40	\$ 666.40		
07/01/2022 - 07/15/2022	290133 Client, Act		OPTUM-ADLT	H0040	15	\$ 624.75	\$ 624.75		

When these charges are included in a *Create Bills* job, the 837 file for this payer has the appropriate policy information for each charge. The policy number and service date range for each charge is highlighted in the Debug file excerpt below.

```
[L.2000B!L.2010BA]NM1*IL*1*CLIENT*ACT*TEST***MI*456
[L.2000B!L.2010BA]N3*123 ANY ST
[L.2000B!L.2010BA]N4*ANYWHERE*RI*123456000
[L.2000B!L.2010BA]DMG*D8*19970826*M
[L.2000B!L.2010BB]NM1*PR*2*OPTUM-ADLT*****PI*87726
[L.2000C!L.2300]CLM*290133-174631*666.4***11>B>1*Y*A*Y*Y*P
[L.2000C!L.2300]HI*ABK>R454
[L.2000C!L.2300!L.2400]LX*1
[L.2000C!L.2300!L.2400]SV1*HC>H0040*666.4*UN*16***1
[L.2000C!L.2300!L.2400]DTP*472*RD8*20220716-20220731
[L.2000C!L.2300!L.2400]REF*6R*290133-174631
[L.2000C!L.2300!L.2400]LX*2
[L.2000C!L.2300!L.2400]SV1*HC>H0036*0*UN*1***1
[L.2000C!L.2300!L.2400]DTP*472*D8*20220721
[L.2000C!L.2300!L.2400]LX*3
[L.2000C!L.2300!L.2400]SV1*HC>99212*0*UN*1***1
[L.2000C!L.2300!L.2400]DTP*472*D8*20220728
[L.2000B]HL*3*1*22*0
[L.2000B]SBR*P*18*****CI
[L.2000B!L.2010BA]NM1*IL*1*CLIENT*ACT*TEST***MI*123
[L.2000B!L.2010BA]N3*123 ANY ST
[L.2000B!L.2010BA]N4*ANYWHERE*RI*123456000
[L.2000B!L.2010BA]DMG*D8*19970826*M
[L.2000B!L.2010BB]NM1*PR*2*OPTUM-ADLT*****PI*87726
[L.2000C!L.2300]CLM*290133-174630*624.75***11>B>1*Y*A*Y*Y*P
[L.2000C!L.2300]HI*ABK>R454
[L.2000C!L.2300!L.2400]LX*1
[L.2000C!L.2300!L.2400]SV1*HC>H0040*624.75*UN*15***1
[L.2000C!L.2300!L.2400]DTP*472*RD8*20220701-20220715
```



Reversing Per Diem Charges

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

The screenshot shows the 'RI Custom Billing' interface. It has two main sections: 'Charge Creation' and 'Reverse Per-Diem'. Both sections have dropdown menus for 'Month' and 'Year', and a 'Client' dropdown. The 'Reverse Per-Diem' section includes a large empty text box and a button labeled 'Reverse Per Diem and Set Shadow Services Ready', which is highlighted with a red arrow.

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* to *READY*.

- This process also removes the records in the `dbo.RICustomPerDiemServices` table that linked the Per Diem Charge(s) and the individual Services.
- Please note that Services set to *DONE* due to a hospitalization or incarceration period remain in *DONE* status.

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 #289345 for December 2021 Services.

The screenshot shows a 'Unprocessed Services > Create Charges' window. It has tabs for 'CREATE', 'HISTORY', and 'ERRORS'. The 'CREATE' tab is active, showing a table with columns: Start Date, End Date, User, Status (set to 'Preview'), and a 'REFRESH' button. Below the table is a 'Details' section with a table containing service information.

Date	Status	Created By	Message	Services	Errors
12/29/2021	Preview		IHH and ACT Charge Creation - December - For Client 289345 - RunDate: 12/29/...	1	0

Service Date	Client	Duration/Units	Payer	Procedure Code	Billed Units	Charge Amount	Balance
12/01/2021 - 12/31/2021	289345 Client, Act2 Test		MEDICAID-ADLT	H0040	31	\$ 1,291.15	\$ 1,291.15



While the job is still in Preview Status, a look at the Services detail shows that the nine individual 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.

✓ MARK READY		✗ DELETE						✓ BULK ACTIONS	
<input checked="" type="checkbox"/>	Status	Date	Client	Staff	Service Code	Program			
	Done	12/28/2021 10:00 AM 45 min	289345 Client, Act2		CASEVOCACT	HT			
	Done	12/24/2021 9:00 AM 40 min	289345 Client, Act2		VOCASMTACT	HT			
	Done	12/21/2021 9:00 AM 10 min	289345 Client, Act2		NBNURCO	HT			
	Done	12/17/2021 1:00 PM 45 min	289345 Client, Act2		TXIND45ACT	HT			
	Done	12/16/2021 2:00 PM 30 min	289345 Client, Act2		OUTIHHACT	HT			
	Done	12/14/2021 9:00 AM 30 min	289345 Client, Act2		CASEVOCACT	HT			
	Done	12/10/2021 10:00 AM 15 min	289345 Client, Act2		NBNURCO	HT			
	Done	12/03/2021 9:00 AM 45 min	289345 Client, Act2		CMNDIHH...	HT			
	Done	12/02/2021 9:00 AM 30 min	289345 Client, Act2		EM2ACT	HT			
	Charge Cre...	12/01/2021 - 12/31/2021 31 units	289345 Client, Act2	1527 Scussel, Laura	PDZACT	HT			


<p>RI Custom Billing</p> <p>Charge Creation</p> <p>Month <input type="text"/> Year <input type="text"/></p> <p>Client <input type="text"/> Create Charges</p> <hr/> <p>Reverse Per-Diem</p> <p>Month <input type="text"/> Year <input type="text"/></p> <p>Client <input type="text"/></p> <p><input checked="" type="checkbox"/> Errors Only</p> <p>Reverse Per Diem and Set Shadow Services Ready</p>	<p>To reverse the Per Diem Charges</p> <ol style="list-style-type: none"> 1. Navigate to the forms menu 2. Select the <i>RI Custom Billing</i> form 3. Enter the Month, Year, and Client related to the Per Diem Charge 4. The form defaults to reversing Per Diem Charges that have Errors. Uncheck the box to reverse all IHH/ACT Per Diem Charges in <i>Ready</i> or <i>Charge Created</i> status. 5. Then select <i>Reverse Per Diem and Set Shadow Services Ready</i> 6. The values for Month, Year, and Client are cleared once the Stored Procedure is triggered
--	---

When the reversal option is selected, a stored procedure is called that reverses the Per Diem Charge(s) and makes the necessary database updates. Any errors encountered during the reversal process are displayed in the box beneath the Client input. Once processing is finished, the December Services for Client #289345 in the *Unprocessed Services > Create* screen displays the following.



<input type="checkbox"/>	Date	Time	Status	Client	Staff	Service Code	Program	Location	Activity
<input type="checkbox"/>	12/28/2021	10:00 AM	Ready	289345 Client, Act2		CASEVOCACT	HT	Community	CMIND
<input type="checkbox"/>	12/24/2021	9:00 AM	Ready	289345 Client, Act2		VOCASMTACT	HT	Court_Men...	ASMNT
<input type="checkbox"/>	12/21/2021	9:00 AM	Ready	289345 Client, Act2		NBNURCO	HT	Benedict_Rd	NURCO
<input type="checkbox"/>	12/17/2021	1:00 PM	Ready	289345 Client, Act2		TXIND45ACT	HT	Community	TXIND
<input type="checkbox"/>	12/16/2021	2:00 PM	Ready	289345 Client, Act2		OUTIHHACT	HT	Community	OUTRCH
<input type="checkbox"/>	12/14/2021	9:00 AM	Ready	289345 Client, Act2		CASEVOCACT	HT	Community	CMIND
<input type="checkbox"/>	12/10/2021	10:00 AM	Ready	289345 Client, Act2		NBNURCO	HT	Client_Home	NURCO
<input type="checkbox"/>	12/03/2021	9:00 AM	Ready	289345 Client, Act2		CMNDIHHACT	HT	Community	CMIND
<input type="checkbox"/>	12/02/2021	9:00 AM	Ready	289345 Client, Act2		EM2ACT	HT	BHDDH	EM2

- The Per Diem Charge is removed
- The nine Shadow Services are set to *READY* Status

 If all Per Diem Charges in a *Create Charges* job initiated by the Acorn (started from the *RI Custom 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.

Start Date	End Date	User	Status	Message	Services	Errors
12/29/2021			Preview	IHH and ACT Charge Creation - December - For Client 289345 - ...	0	0

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.

This example uses Client (#289345) and the same December Services again. A hospitalization period of 12/14-12/17 was recorded before the Create Charges job was run. As a result, two Per Diem Charges were created (one before and one after the hospitalization).

Date	Status	Created By	Message	Services	Errors
12/29/2021	Preview		IHH and ACT Charge Creation - December - For Client 289345 - ...	2	0

Service Date	Client	Duration/Units	Payer	Procedure Code	Billed Units	Charge Amount	Balance
12/17/2021 - 12/31/...	289345 Client, Act2 ...		MEDICAID-ADLT	H0040	15	\$ 624.75	\$ 624.75
12/01/2021 - 12/13/...	289345 Client, Act2 ...		MEDICAID-ADLT	H0040	13	\$ 541.45	\$ 541.45

The Create Charges job was Finalized. The resulting ACT Per Diem Charges have Charge Status of *Active* and Service Status of *Charge Created* (circled in red below) in Claims Management.



CLAIMS MANAGEMENT REPROCESSING HISTORY REPROCESSING ERRORS

Client 289345 Client, Act2 Test **Staff** Start typing to search... **Service Start** 11/01/2021 **Service End** **Billing Start** **Billing End**

Payer Start typing to search... **Payer Category** Start typing to search... **Defined Filter** Start typing to search... **Charge Status** Start typing to search... **SEARCH**

289345 Client, Act2 **Payer Balance: \$ 1,166.20 Client Balance: \$ 0.00**

<input checked="" type="checkbox"/>	Date	Service	Staff	Active/Last P...	Charge Status	Service Status	Last Billed	Charge	Paid	Payer Balance	Client Balance
<input checked="" type="checkbox"/>	12/17/2021 - 12/...	PDZACT	1527	MEDICAID-A...	Active	Charge Creat...		\$ 624.75	\$ 0.00	\$ 624.75	\$ 0.00
<input checked="" type="checkbox"/>	12/01/2021 - 12/...	PDZACT	1527	MEDICAID-A...	Active	Charge Creat...		\$ 541.45	\$ 0.00	\$ 541.45	\$ 0.00

1 of 1 Selected Payer Balance: \$ 1,166.20 Selected Client Balance: \$ 0.00

Action * Reverse Service Transactions **Message *** Reverse Acorn Created Per Diem Charges **Transaction Date *** 12/29/2021 **CONTINUE WITH SELECTION**

Step 1 – Create a Reverse Service Transactions Job in Claims

- a) Locate the Charge in Claims and select the checkbox
- b) Select the *Reverse Service Transactions* Action
- c) Enter a job Message
- d) Select the Transaction Date
- e) Select the blue *CONTINUE WITH SELECTION* button to create the reversing job and acknowledge the confirmation popup

CLAIMS MANAGEMENT REPROCESSING HISTORY REPROCESSING ERRORS

Start Date **End Date** **User** **Preview**

Date	Job Type	Job Status	Created By	Message	Services	Errors
12/29/2021	Reverse Service Transactions	Preview	heather.sherwood	Reverse Acorn Created Per Diem Charges	2	0

Details

Service Date	Client	Duration/Units	Last Active Payer	Last Active Charge	Current Active Payer	Current Active Charge
12/17/2021 - 12/31/...	289345 Client, Act2	15 units	MEDICAID-ADLT	\$ 624.75		\$ 0.00
12/01/2021 - 12/13/...	289345 Client, Act2	13 units	MEDICAID-ADLT	\$ 541.45		\$ 0.00

Step 2 – Review and Finalize the Reverse Service Transactions Job

- f) Navigate to the *Claims > Reprocessing History* screen
- g) Locate the Per Diem Reprocessing job and Correct the Errors if any
- h) Select the Per Diem job row to review the *Details*
- i) Ensure that the *Current Active Payer* is blank and that the *Current Active Charge* is \$0.00
- j) Select the blue *FINALIZE* button and acknowledge the confirmation popup

289345 Client, Act2 **Payer Balance: \$ 0.00 Client Balance: \$ 0.00**

<input type="checkbox"/>	Date	Service	Staff	Active/Last ...	Charge Status	Service Status	Last Billed	Charge	Paid	Payer Balance	Client Balance
<input type="checkbox"/>	12/17/2021 - 12...	PDZACT	1527	-	Reversed	Ready		-	\$ 0.00	\$ 0.00	\$ 0.00
<input type="checkbox"/>	12/01/2021 - 12...	PDZACT	1527	-	Reversed	Ready		-	\$ 0.00	\$ 0.00	\$ 0.00

Once the Reverse to Service Transactions Job is Finalized, the record on the Claims Management screens displays “-” for the *Active/Last Payer*, “Reversed” for *Charge Status*, and “Ready” for *Service Status*.



Start Date	End Date	Client	Staff	Supervisor	Defined Filter	Status	
11/01/2021		289345 ...	Select Staff...	Select Super...	Select Define...	Select Status...	SEARCH
<input checked="" type="checkbox"/>	<input type="checkbox"/>						BULK ACTIONS
Status	Date	Client	Staff	Service Code	Program		
Done	12/28/2021 10:00 AM 45 min	289345 Client, Act2		CASEVOCACT	HT		
Done	12/24/2021 9:00 AM 40 min	289345 Client, Act2		VOCASMTACT	HT		
Done	12/21/2021 9:00 AM 10 min	289345 Client, Act2		NBNURCO	HT		
Ready	12/17/2021 - 12/31/2021 15 units	289345 Client, Act2		PDZACT	HT		
Done	12/17/2021 1:00 PM 45 min	289345 Client, Act2		TXIND45ACT	HT		
Done	12/16/2021 2:00 PM 30 min	289345 Client, Act2		OUTIHHACT	HT		
Done	12/14/2021 9:00 AM 30 min	289345 Client, Act2		CASEVOCACT	HT		
Done	12/10/2021 10:00 AM 15 min	289345 Client, Act2		NBNURCO	HT		
Done	12/03/2021 9:00 AM 45 min	289345 Client, Act2		CMNDIHHACT	HT		
Done	12/02/2021 9:00 AM 30 min	289345 Client, Act2		EM2ACT	HT		
Ready	12/01/2021 - 12/13/2021 13 units	289345 Client, Act2		PDZACT	HT		

Step 3 – Review the Services

- k) Navigate to the Services main menu option
- l) Use the filters to display the necessary Client, Month, and Year
- m) The individual Services should still have a *Done* Status
- n) There should now also be a Per Diem Service in *Ready* Status

User Validations

User Validations

Tasks

Tasks

Templates

Services

Billing

Mark as Ready Button

RI Custom Billing o

RI Medicaid Payers

CMS1500 Box09d Mapping

RI Custom Billing

Charge Creation

Month Year

Client Create Charges

Reverse Per-Diem

Month Year

Client p

289345 Act2 Test Client

Reverse Per Diem and Set Shadow Services Ready q

Step 4 – Reverse the Per Diem Charge from the Custom Form

- o) Navigate to the *Forms* main menu option and select the *RI Custom Billing* form
- p) Enter the Month, Year, and Client for the Acorn Created Per Diem Charge being reversed
- q) Select the reversing option to trigger the stored procedure



Start Date	End Date	Client	Staff	Supervisor	Defined Filter	Status	BULK ACTIONS		
11/01/2021		289345 Client...	Select Staff...	Select Supervis...	Select Defined F...	Select Status...	SEARCH		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	MARK READY	DELETE						<input checked="" type="checkbox"/>
Status	Date	Client	Staff	Service Code	Program				
Ready	12/28/2021 10:00 AM 45 min	289345 Client, Act2	1002 Abrams, Ronald	CASEVOCACT	HT				
Ready	12/24/2021 9:00 AM 40 min	289345 Client, Act2	1002 Abrams, Ronald	VOCASMTACT	HT				
Ready	12/21/2021 9:00 AM 10 min	289345 Client, Act2	2099 Addy, Stephen	NBNURCO	HT				
Ready	12/17/2021 1:00 PM 45 min	289345 Client, Act2	1002 Abrams, Ronald	TXIND45ACT	HT				
Done	12/16/2021 2:00 PM 30 min	289345 Client, Act2	1002 Abrams, Ronald	OUTIHHACT	HT				
Done	12/14/2021 9:00 AM 30 min	289345 Client, Act2	1002 Abrams, Ronald	CASEVOCACT	HT				
Ready	12/10/2021 10:00 AM 15 min	289345 Client, Act2	1842 Adams, Christine	NBNURCO	HT				
Ready	12/03/2021 9:00 AM 45 min	289345 Client, Act2	1002 Abrams, Ronald	CMNDIHHACT	HT				
Ready	12/02/2021 9:00 AM 30 min	289345 Client, Act2	1002 Abrams, Ronald	EM2ACT	HT				

Step 5 – Verify the Per Diem Charge is removed

- r) Return to the Services menu
- s) Filter for the correct Client, Month, and Year
- t) Ensure that all billed Shadow Services returned to *Ready* Status
- u) Ensure that the Ready Per Diem Service is removed (*PDZACT* is no longer listed for the example)
- v) Note that the two Services during the hospitalization period retain the *Done* Status.

The reversing process is now complete for a Finalized Acorn Created Per Diem Charge.

Reprocessing Per Diem Charges in the Claims Management Screen

The following Reprocessing Actions, available in the Claims Management Screen, function the same for Acorn created Per Diem Charges as for all non-Acorn Charges. These three actions do not change anything about the service; they affect the Charge only. A brief description of each action related to the Acorn created Per Diem Charge is listed below.

- Rebill Outgoing and Denied Charges – Resets the Per Diem Charge(s) Status from *Outgoing* to *Active* for rebilling in *Unbilled Charges > Create Bills*
- Reprocess Active Payer – Recalculates the Per Diem Charge for the Current Payer only; the Status is set to *Active*
- Reprocess All Payers – Recalculates the Per Diem Charge amount for all Payers; the Status is set to *Active*

The Reversing Action should only be used as detailed in the section above.

CONFIGURATION & MAINTENANCE

The data Population script is intended to handle the initial configuration automatically. There are no forms to update or modify these tables as they are presumed to be largely static.

Adding a New Medicaid Payer

If any new Medicaid Payers are added in *Configuration > Services/Payers > Payers*, then the new Payer id(s) must be added to the table below to create charges and bill through the Acorn for that Payer.

RICustomMedicaidPayers – Both values are required

- Payer CHAR(36) Link to Payers.id
- MCO CHAR(1), Y or N

Additional Tables and Stored Procedures

In addition to the table above, all Programs and Subprograms that qualify for IHH/ACT Services are stored. A Custom Reporting Staff mapping is also stored. If changes or additions to the Reporting Staff, Programs, or Subprograms are needed, contacting Echo for assistance in the setup is strongly recommended.



Adding a New IHH/ACT Service Definitions

If an additional IHH/ACT Service Definition is required, it first must be created in EchoVantage. Then the Service Definition id, type (I or A), and CountsTowardRequirement (Y or N) must be added to the RICustomServiceDefintions table.

Adding or Updating Reporting Staff

If additional Reporting Staff or changes to existing Reporting Staff are required, the Staff, Program, and Subprogram ids must be added/updated to this table to be picked up by the Acorn.

RICustomReportingStaff

- Id CHAR(36) Use the NEWSMARTGUID function (not null)
- CreateDate datetime (not null)
- UpdateDate datetime (not null)
- CreateUser CHAR(36) – Staff.id of db user (not null)
- UpdateUser CHAR(36) - Staff.id of db user (not null)
- Staff CHAR(36) Link to Staff.id (not null)
- Program CHAR(36) Link to ComponentCodes.id (null)
- SubProgram CHAR(36) Link to ComponentCodes.id (null)

Adding a New Program

If any new Programs are added, the component code id must be added to this table to be picked up by the Acorn.

RICustomAcornPrograms

- Program CHAR(36) Link to ComponentCodes.id

Adding a New SubProgram

If any new Subprograms are added, the component code id must be added to this table to be picked up by the Acorn.

RICustomAcornSubPrograms – Both values are required

- SubProgram CHAR(36) Link to ComponentCodes.id
- Type CHAR(1), A or I

Stored Procedures

dbo.usp_RI_Acorn_Services_To_Job

- Creates the charge creation job
- Parameters: month, year, and an optional client id

dbo.usp_RI_Acorn_Reverse_PerDiem_Services

- Reverses Acorn created Per Diem Charges
- Parameters are month, year, Client

Services Linked to Per Diem Services Table

A new table was added in this version of the Acorn that links a Per Diem Service with the individual Services used to create it. The table has '3' columns *id*, *PerDiem*, *Service*. The PerDiem and Service columns each link to dbo.Services.id.

Static Values

The custom data population script adds dbo.StaticValues records with the following PropertyKey values and agency specific values in the PropertyValue column.

- SUBPROGRAM_COMPONENT_ID
- DAILY_PROGRAM_ID (CCA Only)
- EXCLUDED_HOSPITAL_VALUES
- INCLUDE_NON_REQUIRED_COMPONENTS (CCA Only)



UPDATES

Ticket Number	Description
EV-3616	The Sub-program component IDs were initially hard coded in the Acorn and a job will fail if the component IDs do not match. To prevent future potential conflict, the StaticValues table is now sued to store these Sub-program component IDs. This change does not affect the existing functionality BUT the population script MUST be run again after upgrading the Acorn.
EV-3583	<p>The following issues in version 2.0.47 were reported and addressed.</p> <ul style="list-style-type: none"> • Hospitalization and Incarceration or “stay” periods that overlapped the beginning of the month were causing incorrect dates to be reported in the DTP*472 segment of the 837. The issue was addressed and now if a “stay” overlaps the beginning of the month, the Client’s IHH/ACT Enrollment Start Date is reported in the DTP*472 segment if it is later than the date the Client is discharged from the “stay.” If the IHH/ACT Enrollment start date is before the “stay” discharge date, then the discharge date is used. • When Reversing a Charge using the RI Custom Billing form, error messages associated with the Per Diem Services were not being resolved causing an error in the form. Now when Per Diem Charges are Reversed, the date of the Reversal is stamped in the ResolvedDate to prevent the Service Processing Messages from persisting and potentially causing errors. • On the RI Custom Billing Form, a checkbox was added and is selected by default, that allows the reversal of just the Per Diems with errors instead of all Per Diems in a Create Charges job. • The Create Charges process on the RI Custom Billing form was updated to set a shadow Service to done when a Per Diem Charge for that same Client, Month, and Year already exists.
EV-4353	CCA reported an issue where the Program displayed in the UI for the IHHPD Service Definition did not match the Program in the shadow Service Program component. We found that the Acorn’s create charges job stored procedure was filtering out the Service Program when it matched one in the Service Definition, and then took the top one from the Per Diem Service Definition. This method created the issue for CCA since their IHHPD and ACTPD Service Definitions have multiple Programs defined. Now if the Service Program component matches one from the Per Diem Service Definition, then the Service Program is used.
EV-4657	<p>The IHH/ACT Per Diem charge is now split when a client has a policy renewal that results in a new policy number. The split is based on the client payer effective dates. For example, if an IHH client has Medicaid with effective dates for Policy A from 08/01/2022 through 08/11/2022 and then renews with Medicaid to Policy B from 08/12/2022 through 08/31/2022, the PerDiem charges would be as follows.</p> <ul style="list-style-type: none"> • IHHPD \$152.02 for 11 days (8/1-8/11) with Policy A information • IHHPD \$276.40 for 20 days (8/12-8/31) with Policy B information
EV-4671	A new stored procedure was created to help identify and correct services with the wrong SubProgram information, for example, entering IHH instead of ACT. Before the completion of EV-4672, this type of error would result in a Per Diem charge for both ACT and IHH. While the EV-4672 task below prevents additional per diem charges, this new stored procedure compares the service Program and SubProgram to the Enrollment with the matching Program that is active as of the Service Date and then updates the service SubProgram to match the Enrollment SubProgram if needed. This SubProgram update allows all associated shadow services to be included in the Per Diem charge creation job. The existing mark ready stored procedure is updated to call this new stored procedure.
EV-4672	The Acorn now checks for an existing IHH or ACT Per Diem charge before creating new IHH and ACT Per Diem charges. When either an IHH or ACT PD charge is found, the Acorn sets the shadow service to done and logs a record in dbo.ServiceProcessingMessages with code 9001 - “Found existing per diem. Setting service to done.” These messages do not display in the UI because the Acorn handles all the processing. Previously, this check was only performed on the matching type of Per Diem, allowing both an IHH and an ACT Per Diem charge to be created for the same Client and month.



BUG FIXES

Ticket Number	Case Number	Description
EV-4624	CCA	<p>CCA reported an issue with SubProgram values not copying to the Acorn created Per Diem charges, even though there was a SubProgram value in the associated service. The cause was due to SubProgram not being set as a required component. The issue was addressed by adding an <i>INCLUDE_NON_REQUIRED_COMPONENTS</i> PropertyKey record to <i>dbo.StaticValues</i>. Only CCA will have the PropertyValue set to 'Y' for this flag.</p> <p>CCA also reported that their excluded hospitalization Admission Types differed from Thrive and Newport. To address this issue, the excluded values for hospitalizations are now stored in <i>dbo.StaticValues</i> rather than the Acorn. The PropertyKey is <i>EXCLUDED_HOSPITAL_VALUES</i> and the PropertyValue contains the excluded Admission Types (<i>ER-MED, ER-PSYCH, SAHS, and/or Emergency Visits</i>). This change accommodates different excluded values per agency. In addition, changes in the excluded values will no longer require an update to the Acorn.</p> <p>It was reported that Client Stays where the admission and discharge occurred on the same day resulted in a split Per Diem charge. This issue was addressed and now same day admissions and discharges no longer result in multiple Per Diems.</p> <p>An update was made to the Reverse Per Diem process initiated on the RI Custom Billing form. Now system created adjustments (Copays, or Contractual Adjustments, for example) are deleted when a Per Diem charge is reversed, provided they have not been posted to GL. If the system created adjustments have been posted to GL or there are other types of adjustments associated with the Per Diem charge, it cannot be reversed.</p>