TWI Custom Billing Acorn, v2.0.30

Version 2.0.30

Requires EchoVantage Version 3.28+

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DOCUMENT HISTORY

Date	Description	Author	Version
09/01/2021	Initial Release	Heather Sherwood	2.0.21.RELEASE
10/17/2022	Updated to prevent telehealth services from bundling with non-telehealth services.	Heather Sherwood	2.0.30.RELEASE

The TWI Custom Billing Acorn creates custom bundles by Staff Modifier based on credentials when a client is provided the same Service multiple times in a day. Bundled Service Definitions are not required as the Acorn's custom logic handles the bundling using the same Service Definition information as the individual Services. The Acorn also has an 837 customization to report '99' for the Place of Service when the bundled Services are provided in different locations.

Installing the Acorn

The installation inserts two Acorn Registration records: *TWI Staff Modifier Bundling* and *TWI 837 POS Override*. After installation is complete, the Acorn version displays in the Help > About page in the ACORNs section.

Configuring the Acorn

Select the Acorn for the Applicable Payers

Navigate to *Configuration > Services/Payers > Payers > Processing* for each Payer requiring custom bundling. Select the *Allow Service Bundling* checkbox and select *TWI Staff Modifier Bundling* in the Acorns drop-down listing. Remember to *SAVE these* changes. The Acorn must be defined on the Payer's Processing tab, and Service bundling must be selected to trigger the custom logic during Charge creation.
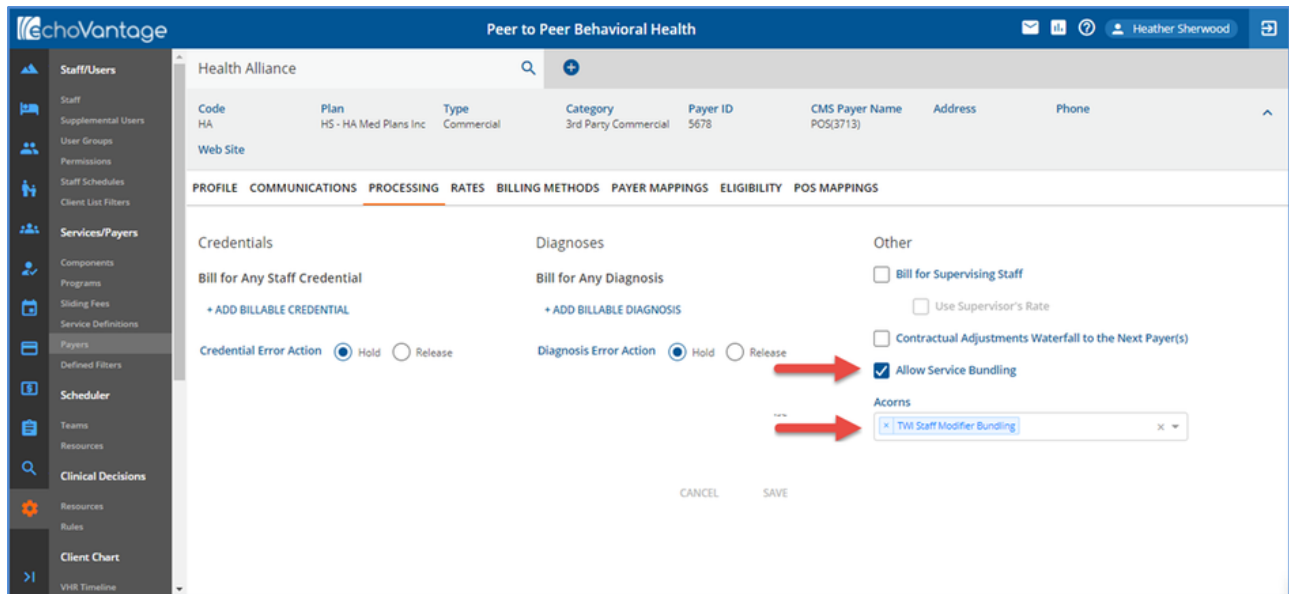
Navigate to *Configuration > Services/Payers > Payers > Billing Methods* for each applicable Payer and select the 837 Professional. Next, select *TWI 837 POS Override* in the Acorns drop-down listing and remember to select *SAVE* to record the changes. The Acorn must be

defined on the Payer's 837 Professional Billing Method to correctly report '99' for the Place of Service in the 837P file when the bundled same day Services are not provided at the same location.

Configure Staff Credentials Modifiers

Staff Credential Modifiers are used to determine if the same day Services qualify for the daily bundle; Services with the same Staff Modifier bundle while Services with different Staff Modifiers do not. These Staff Modifiers can be defined on the Service Definition Rates tab or, in the case of a Payer Rate override, on the Payers Rates tabs in *Configuration > Services/Payers.*

The image above is an example of configured Credential type Staff Modifiers on the Service Definition Rates tab.
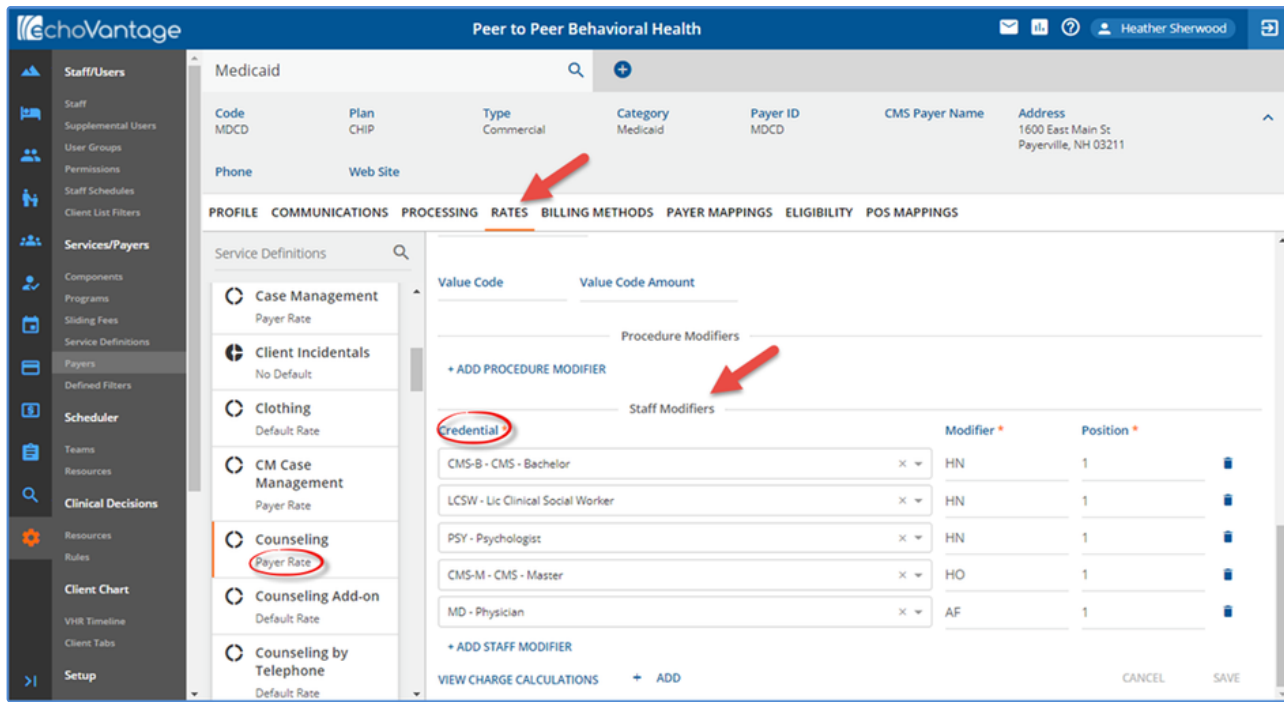
The image above is an example of configured Credential type Staff Modifiers on the Payers Rates tab.

Remember that the same position number cannot be used in both a Procedure Modifier and a staff Modifier. However, the same position may be repeated within the modifier type, like both examples above.

Rates

The Acorn uses the Rate (Unit and Charge Calculation method) information of the individual Service Definition to calculate the Charge for the bundle. Therefore, the creation of Bundled Service Definitions is not required.

The TWI Custom Billing Acorn configuration steps are now complete.

Processing Services Using the Acorn

Follow your agency's typical workflow for entering and marking Services as Ready. The Acorn's custom logic is triggered during the *Fiscal Overview > Unprocessed Services > Create Charges* process when charges are created for Payers with the *TWI Staff Modifier Bundling* Acorn selected in *Payers > Processing.* A Daily bundle is created when

- Two or more of the same Services are provided in a single day.
- The Staff Credential modifiers are the same for these Services.
- And the service Locations are all telehealth or all non-telehealth locations.
    - Telehealth and non-telehealth services are not bundled together.
    - TeleHealth (component id 20210604075007776EC37BC7ECB51401DB08) and TeleHealth Home (component id 20220324040158916AD2AFD25D3224C06BEB) bundled together
    - All other locations for the same client, same day, same service, and same staff modifier can bundle together.

> ⓘ The Staff Credential must be active (active credentials have an end-date on or after the Service Date) to be associated with a modifier.
>
> - *If a Staff Credential is inactive or not defined in the Service Definition or Payer's Rates tab, no modifier is associated with the Service.*
> - *Multiple same-day Services that do not have modifier associated are bundled together, separate from other bundles for Services that do have a modifier associated with them.*

Examples

No TeleHealth Services Provided

In the following example, clients Sandy Beach and Sia Amato each receive 3 individual Counseling Services on the same day. Sandy's primary Payer is Medicaid, while Sia's primary Payer is Health Alliance. The following table lists the Staff Credential and corresponding modifier for that credential as configured for each Payer.

Staff Name	Staff Credential	Medicaid Modifiers - Sandy	Health Alliance Modifiers - Sia
Joe Staffer	PSY	HN	HP
Nevaeh Staff	LCSW	HN	AJ
Bachelor Staff	CMS-B	HN	HN

After the Services are entered and marked *Ready,* navigate to *Fiscal Overview > Unprocessed Services > Create Charges* to select the Services and create a job.

Click on the *HISTORY* tab to view the Create Charges job.

Then select the job row to view the details. Based on the table above, a bundle of 3 Services is expected for Sandy Beach; all 3 modifiers are the same, while a Charge for the individual Services is expected for Sia Amato because each modifier is different.

Service Date	Client	Duration/Units	Payer	Procedure Code	Billed Units	Charge Amount	Balance
		Details					
08/05/2021	000043 Sia Amato	60 min	HA	90806 - HP	2	$ 75.00	$ 66.30
08/05/2021	000043 Sia Amato	60 min	HA	90806 - AJ	2	$ 75.00	$ 66.30
08/05/2021	000043 Sia Amato	60 min	HA	90806 - HN	2	$ 75.00	$ 66.30
08/04/2021	000041 Beach, Sandy, Jr.	60 min	MDCD	90806 - HN	4	$ 150.00	$ 132.60

As expected, the job Details show that 3 Services are bundled into a single Charge for Sandy Beach and Charges created for each of Sia Amato's Services. Once the Create Charges job is reviewed and error-free, select *FINALIZE* to complete the Charge Creation process.

Date	Status	Created By	Message	Services	Errors
08/09/2021	Done	heather.sherwood	Create Charges for Payers with TWI Acorn Configured	6	0

The Charges are now ready for the *Unbilled Charges > Create Bills* process.

TeleHealth Services Provided

For this example, client Elaine Cloran received four of the same services, on the same day, from two staff with credentials in the same credential group. Three of the services were provided at Location A0 while one service was provided at Location 02.

Date	Time	Status	Client	Staff	Service Code	Program	Location	Activity
10/07/2022	10:00 AM	Ready	050554 Cloran, Elaine	KB1 Bunker, Kathy	IATPONB	1300	02	0Q21
10/07/2022	11:30 AM	Ready	050554 Cloran, Elaine	KB1 Bunker, Kathy	IATPONB	1300	02	0Q21
10/07/2022	1:30 PM	Ready	050554 Cloran, Elaine	HS123 Sherwood, Heather	IATPONB	1300	A0	0Q21
10/07/2022	3:30 PM	Ready	050554 Cloran, Elaine	HS123 Sherwood, Heather	IATPONB	1300	02	0Q21

Using this version of the Acorn, a bundle of the three services consisting of the three services provided at Location 02, and a stand-alone charge is created for the single service provided at Location A0.

⬇ DOWNLOAD CSV

rvice Date	Client	Duration/Units	Payer	Procedure Code	Billed Units	Charge	Balance	Message
/07/2022	050554 Cloran, El...	30 min	132	H2000 - HO	6	$ 262.50	$ 262.50	
/07/2022	050554 Cloran, El...	30 min				NO CHARGE		
/07/2022	050554 Cloran, El...	44 min	132	H2000 - HO	3	$ 131.25	$ 131.25	
/07/2022	050554 Cloran, El...	30 min				NO CHARGE		

A single bundled charge is not created because non-telehealth services can no longer be bundled with telehealth services.

Creating Bills Using the Acorn

The Acorn follows the typical billing workflow. The Acorn's custom logic is triggered during the *Fiscal Overview > Unbilled Charges > Create Bills* process when bills are created for Payers with *TWI 837 POS Override* selected in the 837 Professional configuration. When a Payer with this Acorn and the 837P Billing Method is selected in *Unbilled Charges > Create Bills,*

- The Place of Service value reports as '99' for the daily bundles if the location of each Service that makes up the bundle is not the same.
- When the Place of Service is the same for each Service that makes up the daily bundle, that location is reported.
- Services that fail to bundle are not affected by this Place of Service override.

An 837P bill is created for the Charges created in the section above. The detail for the Services included in that job is shown below. Note that the location is different for each of the bundled Services.

The 837P Billing Method job is created in *Fiscal Overview > Unbilled Charges > Create Bills > Create* tab.

After selecting the blue *CREATE JOB* button, navigate to the History tab to view the 837 files and report.

If the job contains any Errors, the count is listed. Error detail is viewable on the *ERRORS* tab and should be addressed before Finalizing the Create Bills job. Select one of the 837P downloads to view the file details. (The Debug file has line breaks for each segment, making reviewing the information more accessible.) There is an 837 file for each Payer included in the 837P job.

```
ISA*00*      *00*      *ZZ*12345      *ZZ*66666666     *210810*1317*^*00501*000001270*0*T*:
GS*HC*12345*66666666*20210810*1317*1270*X*005010X222A1
ST*837*1270*005010X222A1
BHT*0019*00*1270*20210810*1317*CH
[L.1000A]NM1*41*2*ECHO*****46*12345
[L.1000A]PER*IC*KATHY BUNKER*TE*5555555555
[L.1000B]NM1*40*2*MEDICAID FFS*****46*66666666
[L.2000A]HL*1**20*1
[L.2000A!L.2010AA]NM1*85*2*ECHO MANAGEMENT*****XX*8888888888
[L.2000A!L.2010AA]N3*15 WASHINGTON ST
[L.2000A!L.2010AA]N4*CONWAY*NH*038181234
[L.2000A!L.2010AA]REF*EI*235135513
[L.2000B]HL*2*1*22*0
[L.2000B]SBR*P*18*G123******MC
[L.2000B!L.2010BA]NM1*IL*1*BEACH*SANDY***JR.*MI*P123
[L.2000B!L.2010BA]N3*831 SHORELINE DR
[L.2000B!L.2010BA]N4*SILVER LAKE*NH*03875
[L.2000B!L.2010BA]DMG*D8*19651017*M
[L.2000B!L.2010BB]NM1*PR*2*MEDICAID*****PI*MDCD
[L.2000C!L.2300]CLM*000041-6303*150***99:B:1*Y*C*N*Y*P
[L.2000C!L.2300]HI*ABK:R454*ABF:F10950
[L.2000C!L.2300!L.2310B]NM1*82*1*STAFFER*JOE
[L.2000C!L.2300!L.2400]LX*1
[L.2000C!L.2300!L.2400]SV1*HC:90806:HN*150*UN*4***1:2
[L.2000C!L.2300!L.2400]DTP*472*D8*20210804
[L.2000C!L.2300!L.2400]REF*6R*000041-6303
SE*25*1270
GE*1*1270
IEA*1*000001270
```

Place of Service Override = 99

The Place of Service Override location of '99' is reported in the Claim segment for the bundled Charge.

Unbilled Charges » Create Bills									✕
CREATE HISTORY ERRORS									

Payer		Start Date	End Date	User		Status		
Start typing to search... ▾		08/04/2021 📅	📅			✕ Done ✕ ▾		**REFRESH**

Date	Payers	Status	Created By	Message	Charges	Errors			
08/10/2021	2	Done	heather.sherwood	TWI Custom Bundling & Override	$ 375.00	0			📄 ⬇ ⬇ Report 837P Debug

Once the Create Bills job is reviewed and approved, select *FINALIZE* to complete the Create Bills process. Finalizing the job changes the Charge Status from *Active* to *Outgoing* in the Claims menu.

000043 Amato, Sia									Payer Balance: $ 198.90 Client Balance: $ 0.00	
☐	Date	Service	Staff	Active/Last Pa...	Charge Status	Service Status	Last Billed	Charge	Paid	Payer Balance	Client Balance
☐	08/05/2021	COUN	JS123	HA	Outgoing	Charge Created	08/10/2021	$ 75.00	$ 0.00	$ 66.30	$ 0.00
☐	08/05/2021	COUN	NS101234	HA	Outgoing	Charge Created	08/10/2021	$ 75.00	$ 0.00	$ 66.30	$ 0.00
☐	08/05/2021	COUN	MD1234	HA	Outgoing	Charge Created	08/10/2021	$ 75.00	$ 0.00	$ 66.30	$ 0.00

000041 Beach, Sandy, Jr.									Payer Balance: $ 132.60 Client Balance: $ 0.00	
☐	Date	Service	Staff	Active/Last Pa...	Charge Status	Service Status	Last Billed	Charge	Paid	Payer Balance	Client Balance
☐	08/04/2021	COUN	JS123	🔵 MDCD	Outgoing	Charge Created	08/10/2021	$ 150.00	$ 0.00	$ 132.60	$ 0.00

Navigate to the Claims menu to view the Charges for each client. Sia Amato has three individual Charges because the Services did not qualify for bundling, so no custom processing was applied. The Claim for Sandy Beach has the bundled indicator with a '3' because three Services were bundled.

Additional Considerations

The Acorn creates bundles based on matching modifiers. For example, if a client receives the same Service multiple times in one day, each with a different Service Staff, multiple bundles can result. If any Service does not qualify for bundling, it is processed individually based on the Service Definition or Payers Rate schedule.

For example, if a client receives Counseling Services on August 10th with each of the Staff in the table below, the Create Charges job results in 2 bundles and 1 individual Service.

Staff Name	Staff Credential	Payer Modifiers
Bachelor Staff	CMS-B	HN
Nevaeh Staff	LCSW	AJ
DOC1 OnSite	PSY	HP
DOC2 OnSite	PSY	HP
Joe Staffer	LCSW	AJ

The list of Ready Services is shown below.

Based on the Staff Credential and Modifier information,

- The 2:00 pm and 2:30 pm Services have an 'HP' modifier and are both provided in location 11.
- The 11:00 am and 5:00 pm Services have an 'AJ' modifier and are provided in different locations, HOME, and COMM.
- The 9:00 am Service has an 'HN' modifier.

When the Details are viewed on the *Unprocessed Services > Create Charges > History* tab, two bundles (one for modifier AJ and one for modifier HP) are created, and one individual charge is created. These charges are finalized, and then an 837P bill is created to complete the billing process.

The resulting 837P file has three Claim segments.

[L.2000C!L.2300]CLM*000057-6329*37.5***53:B:1*Y*A*Y*Y*P [L.2000C!L.2300]HI*ABK:F1010 [L.2000C!L.2300!L.2310B]NM1*82*1*STAFF*BACHELOR	• A Claim for the Service associated with the HN modifier • Location is based on the organization default
[L.2000C!L.2300]CLM*000057-6331*75***11:B:1*Y*A*Y*Y*P [L.2000C!L.2300]HI*ABK:F1010 [L.2000C!L.2300!L.2310B]NM1*82*1*ONSITE*DOC1	• A Claim for the two Services associated with the HP modifier • Place of Service is '11' because both Services were provided at location '11'
[L.2000C!L.2300]CLM*000057-6330*75***99:B:1*Y*A*Y*Y*P [L.2000C!L.2300]HI*ABK:F1010 [L.2000C!L.2300!L.2310B]NM1*82*1*STAFF*NEVAEH	• A Claim for the two Services associated with the AJ modifier • Place of Service is '99' because the Services were not provided at the same location