Payment Amt Paymenttype\_value

Guar Claim Guar\_ID Liability Number Claim\_Date Payment Trans To Date QuariD

# **CLINIC SCHED VS CLAIMED AND PAYMENT**

**Purpose**: Generate the status of an appointment/service during each stage at which it exists.

Since we provide billable services only, reviewing this data will enable us to identify if (1) the service was posted; (2) the charge was generated as expected, or if there was an issue with charge calculation. This report can also be used as a cross check to the billing department since it lists if the claim for the service was generated and if payment was received.

Form: Select Facility / By Program? {choose No, to run for all programs} / Select Program(s) / Select Service Type {<u>All</u> <u>Services</u> / Non-scheduled Services / Scheduled Services} / Date Range {of Appointments}

**Report**: Episode / Patient ID / Patient Name / Service Date / Appointment Status / Posted ? / Service Code / Service Description / Program Name / Option Description / Provider Name / Guarantor ID / Guarantor Liability / Claim Number / Claim Date / Payment Amount / Payment Type / Payment Date / Transfer to Guarantor ID

All Services VS Service Claimed and Payment Report

From date to

Option Description

#### The 'Clinic Sched vs Claimed and Payment' report is best used when filtered in Excel. See "Steps to Export to Excel" at the end of this document.

# **CLIENT FE POLICY DIAGNOSIS VERIFICATION**

Appt Posted Appt Bervice Date Status Value Value Bervice Code Service Descript

Purpose: Generate a report of clients with missing information for every episode:

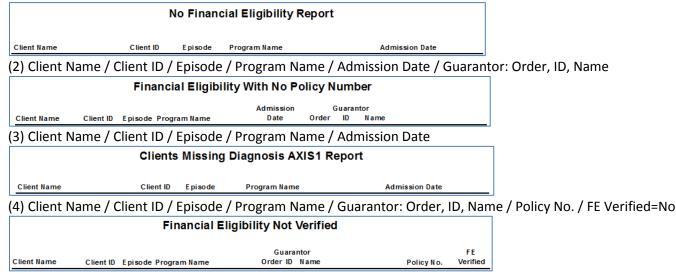
- (1) no financial eligibility applied, or
- (2) no subscriber policy number, or
- (3) no diagnosis, or
- (4) no verified financial eligibility.

### Notes:

- A client missing Item (1), No FE, will not generate a billable charge for any services received until the FE is recorded. A client with this status, that has received services, will appear on the 'Clinic Sched vs Claimed and Payment' report with guarantor liability distributed to Guarantor 99999 (Netsmart default Guarantor). Once the FE has been entered, please inform Frederique Altidor or Tamika Marable (Billing) of the change so that they may follow-up on previous services rendered, to ensure these services get billed appropriately.
- For clients missing one or more of Items (2)-(4), a billable charge will be generated for services rendered, but the charge will not be claimed until the outstanding issues have been resolved.

**Form**: Select Facility / Select Report Type / Date Range (enter today's date for both fields) **Report**:

(1) Client Name / Client ID / Episode / Program Name / Admission Date



**Billing Audit Reports 1** 

# **CL SERVICE DURATION ENTERED VS STANDARD**

**Purpose**: Generate a report for all services within the date range that have an incorrect duration that would prevent a charge being generated for the service. The 'Edit Service Information' form can be used to enter the correct duration once this has been confirmed.

Form: Select Facility / Date Range

Report: Episode / Patient ID / Service Description / Date of Service / Provider / Duration {entered} by User / {Acceptable} Duration Range {for the service} / Checker (Less or More) / Guarantor ID / Date Billing Closed / Data Entry User / Claim Date / Claim #

		Service Du	ration Input Va	lue Vs Dur	ation Ra	inge Vei	rificatio	on Report		Report Date:	6/25/2014
			Data Date Ran	ge: from 5/1/2	014 th rou	gh 6/25/2	014				
				Duration	duration			Date Billing			
EP# PatID	Service Description	DOS	Provider	By User	Range	Checker	GuarID	Closed	Data Entry User	Claim Date	Claim #

Edit Service Information to adjust an open service:

1. Choose Client and Episode.

2. Click "Select Service(s) to Edit" button.

3. Select service(s) and click OK.

4. Adjust the episode, program, service code, duration, or practitioner, as applicable for all selected services.

# **CLINIC SERVICE BILLING ZERO CHARGE REPORT**

**Purpose**: Generate a report displaying (1) services with zero charge, or (2) services that are missing a duration. **Notes**:

- If clients are listed under the 'Zero Charge' report, generate the 'Cl Service Duration Entered vs Standard' report to identify the duration that should be entered for a charge to be generated.
- If clients are listed under the 'Zero Duration' report, please contact the Avatar team for assistance.

Form: Select Facility / Select Program(s) / Date Range / Select Check Option: Zero Charge, Zero Duration Report:

1) RRG / Episode / Program / Patient ID / Patient Name / Service Date / Service Code / Service Description / Duration / Service Cost (0.00) / Provider ID / Provider Name / Group Code Value / Charge Category / Service Status / Data Entry



2) RRG / Episode / Program / Patient ID / Patient Name / Service Date / Service Code / Service Description / Duration (0 or null) / Service Cost / Provider ID / Provider Name / Group Code Value / Charge Category / Service Status / Data Entry

						(	Clinic Service	e Billiı	ng Ze	ro D	uration R	eport					
							Service I	Date Betv	/een 5/1	/2014 T	Fo 6/25/2014						
RRG	Epis	Program	PATID	Patient Name	Service Date	Service Code	Service Description	Duration	Service Cost	Provider ID	Provider Name	Group Code Value	Charge Category	Service Status	data_entry_by	data_entry date	data_entry time

# 99999 LIABILITY REASONS REPORT

Purpose: Generate a report that shows the reason services are under the default 99999 guarantor (i.e., missing FE).

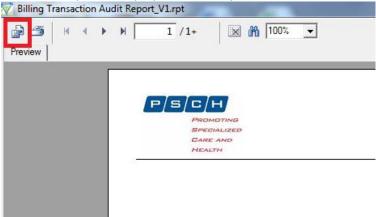
Form: Select Facility / Select Program(s)

**Report**: No Financial Eligibility or Check Account / RRG / Program / Client ID/Client Name / Episode / Admit Date / Date of Service / Service Code / 99999 \$

	Liability	Distribution to 99999 R	eport		
		As of:			
No Financial Eligibility					
RRG:					
Program:					
Client ID / Client Name	EP#:	Admit: Date	<u>D.O.S</u>	Service Code	<u>99999 \$</u>

#### Steps to Export to Excel

1. When the report is displayed in the Report Viewer in Avatar, click on the first icon to export it.



2. Select Separated Values (CSV) as the Format and then click OK (this option will work for the Clinic Sched vs Claimed and Payment report; for other reports, you may choose the Data Only option).

Export	×
Eormat:	
Separated Values (CSV)	ОК
Destination:	Cancel
Disk file	
Description Separated values is a record-based data-exchange format. the report object contents as a set of values separated by s and delimiters. One line of values is exported for each recor report and each record contains all of the fields in each secti	eparators dof your

3. Check off 'Isolate Report/Page sections' and then click OK.

Separated Values Export Options	×
Character options Delimiter: Separator: , Tab	<u>OK</u> <u>C</u> ancel
Mode: Standard mode  Report and Page sections:  Export Do not export Group sections:  Export Isolate Group sections C Do not export	

4. Navigate to the network folder where you want to save the CSV file. Type in a file name and then click Save. At this point, the file can only be saved as CSV.

Organize 🔹 Nev	v folder		1 - 1)(		 •
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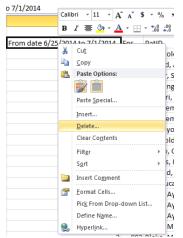
5. **Using Windows Explorer**, not Excel, navigate to find your saved CSV file, and then double-click on it to open it. The example below was saved to the Desktop.



6. The opened CSV file will appear as below, with patient data below the column headers.

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- 7. For the 'Clinic Sched vs Claimed and Payment' report, you will need to delete cell **B2** so that the column headings conform:
  - Right-click on Cell B2 and choose Delete.



- Choose to Shift Cells Left and click OK:

Delete ? 🔀
Delete
Shift cells left
Shift cells up
Entire row
Entire <u>c</u> olumn
OK Cancel

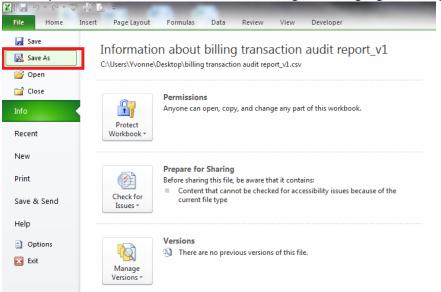
8. From the top ribbon in Excel, click on the Home tab (the first tab). All the way to the right on the top ribbon, click on Format, then scroll down and click on AutoFit Column Width.

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9. All column data will appear now, instead of being truncated (cut off).

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A B C 1 Ep# PatID patient Name	D E F G Service Date ChargeAmt Payment Amt Payment Date	H I ate Service Code Service Code Desc	Guarantor ID & Name Pro	gram Name Cla	L M N im # Provider Name Payment Type

10. Click anywhere in the Excel data to remove the light blue highlight from appearing. Then select File, Save As.



11. Navigate to the network folder where you want to save the new Excel file. Type in a file name. Under Save as type, click the dropdown arrow, and scroll to select the first option which says Excel Workbook. Click on Save.

