HOME CARE BILLING
QUICK REFERENCE GUIDE
<u>February 2022</u>

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CREATE INVOICE

Billing/Invoice/Create Invoices

1. Choose a Branch, Payment Source, Date Range, and Option to "Ignore already billed tasks."
2. Select **Generate**.
3. Choose Payment Terms.
4. Enter Invoice, Due, Start and End Dates.
5. Check the box(es) next to MRN.
6. Select **Create Invoices**.

NOTE: By default, only the invoices that do not have an overlapping date range will be selected. Overlapping invoices may be manually selected for invoice creation.

OUTSTANDING INVOICES

Select **Go to Outstanding** from the previous section or
Billing/Invoice/Outstanding Invoices

1. Choose Branch (if more than one), Payment Source and/or start typing any column parameters to narrow down list.
2. Select **Generate**.
3. Group by Branch and/or Payer.
4. Select the **Name** hyperlink to view invoice details.

NOTE: Invoices will show a ✖ under "Is Verified" column until they are verified when it will change to a ✔.

5. Verify the information is correct.
   a. Select Invoice Notes in the top right corner to review invoice notes. **Add**, **Edit** or **Resolve** invoice notes using the respective buttons/hyperlinks.
6. Select **Refresh Pre-defined Services/Tasks** to get an updated list.
7. Add comments to Pre-defined Services/Tasks.
   a. Select **Add Custom Service/Task** to add a custom service/task**.**
      i. Enter Service/Task Description, Comments, Quantity and Rate.
8. Select **Save** or **Save & Print.**

    a. If **Save & Print** is selected, then the invoice will generate to the browser's download folder.

    b. Also, select ◯▸ to **Print** and/or **Send** the verified invoice. If **Send** is selected, the invoice will be sent via email.

9. Select the checkbox next to the invoice.
10. Select **Mark as Sent.**
11. Once printed, update the invoice status by selecting the checkbox and selecting **Marked as Submitted**.

INVOICE HISTORY/NEW INVOICE
Billing/Invoice/Invoice History

Where users create an invoice if it was not created -
1. Filter by Branch (if more than one), Status, Filter and/or Find.
2. Select Client.
3. Select **New Invoice.**
    a. Enter From and To date.
    b. Choose Payment Source.
    c. Select **Continue**.
4. New invoice and opens for the user.
    a. Verify that the information is correct.
    b. Add comments to Pre-defined Services/Task.
    c. Select **Add Custom Service/Task** to add a custom service/task**.**
        i. Enter Service/Task Description, Comments, Quantity and Rate.
    d. Select **Save** or **Save & Print.**
        i. If **Save & Print** is selected, then the invoice will generate to the browser's download folder.
        ii. Also, select ◯▸ to **Print** and/or **Send** the invoice. If **Send** is selected, the invoice will be sent via email.
5. Check the box next to the invoice.
6. Select **Mark as Sent.** Green disappearing notification confirms, "The claim(s) have been successfully marked as sent."

INVOICE HISTORY
Billing/Invoice/Invoice History

View all activity, status and post payments or adjustments for invoices. Options under the Action column include:

- **Print** enables users to print an invoice for mailing individually.
- **Verify/Edit** confirms the invoice if it is in a created status.
- **Send** enables users to email the invoice to a payer.
- **Receive Payment** enables users to post payments.
- **View Payments** enables users to see payments.
- **Delete** removes the invoice.

Posting Payments
Billing/Invoice/Invoice History

1. Select **Post Payment**.
2. Enter the payment amount.
3. Enter the date.
4. Enter comments.
5. Select **Save**.

To adjust if there is a balance amount on the invoice:

1. Select **Post Adjustment**.
2. Enter the adjustment amount.
3. Enter the date.
4. Choose the adjustment code, description and type.
5. Choose positive or negative. **NOTE**: Based on the code, the adjustment type will auto-generate.
6. Enter comments.
7. Select **Save**.

NOTE: Go to *Admin/New/Adjustment Code* for the organization to make their own adjustment codes.

Quick Reports

Activity Logs - View which user took which action and when**.**

MANAGED CARE/OTHER INSURANCES

Create Claims
Billing/Managed Care Other Insurances/Create Claims

1. Filter by Branch (if more than one), Payment Source, From and To Date. Clients with overlapping claims will be highlighted in **orange**.

2. Select **Generate**.
3. Payment Source, Start Date and End Date pull from the generated criteria above.
4. Check the box(es) next to MRN.
5. Select **Create Claims**.
6. Green disappearing notification confirms, "Claim(s) added Successfully."

Outstanding Claims

Select **Go to Outstanding** from the previous section or *Billing/Managed Care Other Insurance/Outstanding Claims*. The claim note column is to the right of the verified column. A grey claim note indicates there are no notes, a blue note indicates unresolved notes, and a green note indicates all notes associated with the claim have been marked as resolved.

1. Filter by Branch (if more than one) or Payment Source.
2. Select **Generate**.
3. Check the box(es) next to the Client Name that has a Verified claim.
4. Select **Submit Selected Electronically**.
5. Green disappearing notification confirms, "Claim(s) added successfully."

Claims History/New Claim
Billing/Managed Care Other Insurances/Claims History

Where users create a Claim if it was *not* created -
1. Filter by Branch (if more than one), View, Filter and/or Find.
2. Select a Client.
3. Select **New Claim.**
   a. Enter the From and To date.
   b. Choose a Payment Source and Claim Type.
   c. Select **Create**.
4. New claims are created and ready to verify.

NOTE: See Admin manual for how to add new insurance.

Claims History
Billing/Managed Care-Other Insurance/Claims History

View all activity, status and post payments or adjustments for claims.

Quick Reports

1. <u>View Payments/Adjustments</u> - View the list of payments and adjustments with the option to **Update**, **Delete** or add a **New Payment** or **New Adjustment.**
2. <u>Activity Logs</u> - View the action the user tookand when**.**

Verify Claim

Billing/Managed Care/Other Insurance/Outstanding Claims or *Claims History*

1. Go to *Outstanding Claims* and select the Client Name or go to *Claims History* and select *Action/Verify/Edit.*
2. Complete the five-step claim verification process.

<u>Step 1 (Demographics)</u> - Confirm information that pulls from the Client Chart. Select **Verify & Next**.

NOTE: Add Claim Notes throughout claim verification screens in the top right of the page by selecting the **Claim Notes** button. Add, edit and resolve comments as needed.

<u>Step 2 (Verify Insurance)</u> **-** Add locator information as needed. Select **Reload Locators and Providers** to update payer information (if changes made at the payer level). Select **Verify and Next**.

<u>Step 3 (Verify Visits)</u> **-** All billable visits default with a checkmark in the Billable checkbox. Deselect any visits not wished to be billed. Select **Verify & Next**.

<u>Step 4 (Verify Supplies)</u> - Review, add, edit, or delete supply items from the bill.

NOTE: Most insurance companies include supply cost in the visit rate. Most supplies are non-billable unless the organization received authorization to bill supplies or has a contract specifying supplies that may be billed. Select **Verify & Next**.

<u>Step 5 (Summary)</u> - This shows a summary of the claim and is broken down into sections. Verify the information from the previous steps. Select **Complete**.

3. The verification column will then show a ✔.

Posting Payments

Billing/Managed Care Other Insurances/Claims History

1. Select **Post Payment**.
2. Enter the Payment Amount and Payment Date.
3. Choose a Payer.
4. Enter Check/RA Number and Check Amount.
5. Enter Comments.
6. Select **Save**.

To make an adjustment if there is a balance amount on the claim:

1. Go to *Managed Care/Other Insurances/Claims History*.
2. Select **Post Adjustment**.
3. Enter the Adjustment Amount, Adjustment Date, Check/RA Number and Amount.
4. Choose Adjustment Code, Description and Type.
5. Choose Positive or Negative.

NOTE: Based on the code, the Adjustment Type will auto-generate.

6. Enter Comments.
7. Select **Save**.

Electronic Claim Submission
Billing/Managed Care Other Insurances/Outstanding Claims

1. Choose the Branch (if more than one) and Payment Source.
2. Select **Generate.**
3. Check the box(es) next to the Client's Name.
4. Select **Submit Selected Electronically**.

If the organization has chosen not to submit claims through Axxess Home Care electronically:

1. Go to *Billing/Managed Care Other Insurances/Claims History*
2. Find the Client.
3. Select Action for the correct claim.
4. Select **Download ANSI**.
5. Save to the computer.
6. Upload to the payer.
7. Go to *Managed Care/Other Insurance/Outstanding Claim*s.
8. Check the box next to the Client.

9. Select **Mark Selected as Mailed**.
10. Drops off the Outstanding Claims screen.

Claim Submission History
Billing/Managed Care/Other Insurance/Claim Submission History

1. Choose the Branch (if more than one), Payment Source and Date Range.
2. Select **Generate.**
3. Claims can be viewed in two ways:
   a. Select the ⊞ icon.
   b. Select **View Claims**.
4. The expanded claim will list the MRN, Client, Type, Claim Date Range, Date Created and Claim Amount.
   a. To view the submitted form, select **UB** or **HCFA** to download a PDF copy.
   b. The **Export** hyperlink will create an excel spreadsheet of just that batch.
   c. Select **Response** to see the Immediate Batch Text Response.

REMITTANCE ADVICE
Remittance Advice pulls into the Home Care solution for all organizations which are set up to bill electronically through Axxess.

Search by payer name, Payment Start Date, Payment End Date and by EFT Number. Once any parameters are entered into the filters, select the **Search** button.

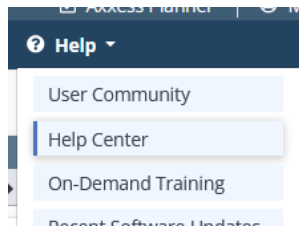Select **View Details** to view the remittance details.

To add remittance:
1. Select **Add Remittance** to enter checks.
2. Enter the Check (EFT) Number.
3. Choose payer
4. Enter the received date, payment date and payment amount.
5. Select **Create**.

HELP CENTER

Help/Help Center

A great resource that is available 24/7 is our Help Center. It is a place to get answers to frequently asked questions or watch videos of all of Axxess' products. It can be accessed by going to:

Or also available at https://www.axxess.com/help/