

HOME CARE BILLING MANUAL

January 2022

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Users with Billing permissions may access the Billing center from the main menu. The Billing tab contains two main categories:

- The **Invoice** tab, allows users to bill and manage invoice payers.
- Managed Care/Other Insurances allows for the creation, billing and updating of all managed care payers.

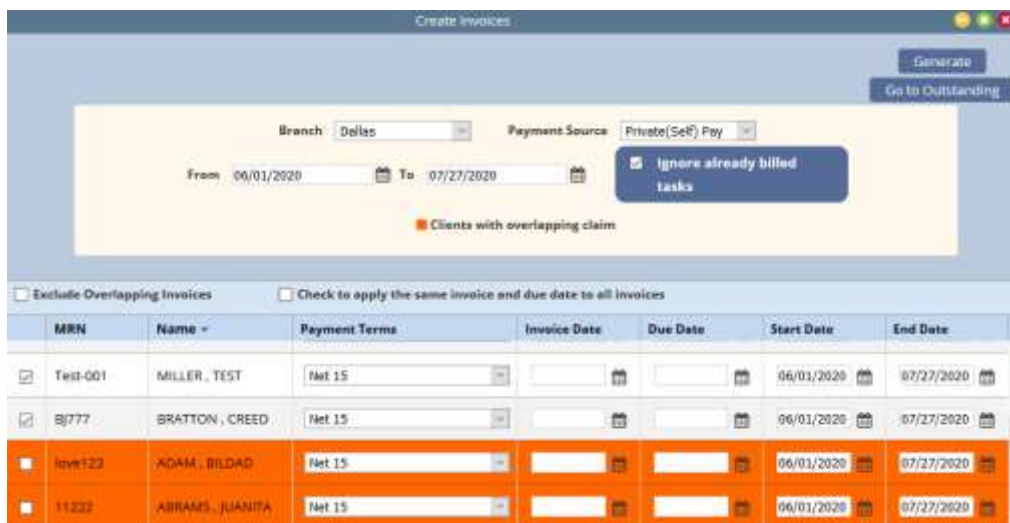
The **Invoice** tab contains three submenus:

- Create Invoices - Used to create invoices for private pay and payers billing on invoices.
- Outstanding Invoices - Once invoices are created, they move into the outstanding invoice page for review and submission.
- Invoice History - This is used to view and update invoices. Features include the ability to view existing client invoices, post and view payments and adjustments.

CREATE INVOICES

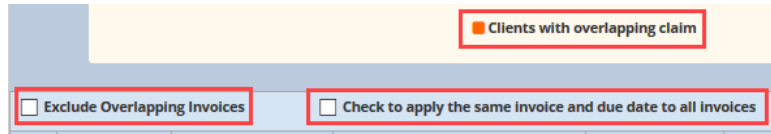
Choose the Branch (if more than one), select the Payment Source and the From and To date. The user has the option to select “Ignore Already Billed Tasks,” which removes Tasks that may be associated to another invoice. Then select **Generate** once parameters are entered.

This generates a list of all clients with tasks that meet the criteria. Client invoices that contain an overlapping date range will appear in orange within the list.



MRN	Name	Payment Terms	Invoice Date	Due Date	Start Date	End Date
<input checked="" type="checkbox"/> Test-001	MILLER, TEST	Net 15			06/01/2020	07/27/2020
<input checked="" type="checkbox"/> B1777	BRATTON, CREED	Net 15			06/01/2020	07/27/2020
<input type="checkbox"/> love123	ADAM, BELDAD	Net 15			06/01/2020	07/27/2020
<input type="checkbox"/> 11222	ABRAMS, JUANITA	Net 15			06/01/2020	07/27/2020

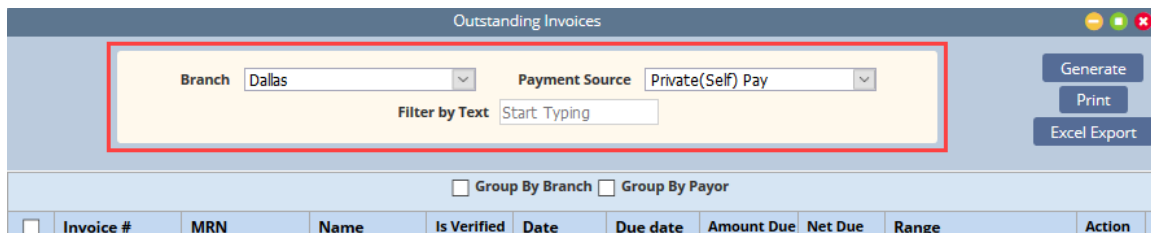
By default, only the invoices that do not have an overlapping date range will be selected. Overlapping invoices may be manually selected for invoice creation. Users have the option to hide overlapping invoices by checking the “Exclude overlapping invoices” box.



Billers may individually enter the Invoice Date, Due Date or select [checkbox] to apply the same dates to all selected invoices. Payment Terms default to the payment source set up but may be adjusted. Select the desired checkboxes, then select **Create Invoices**. This creates and moves the invoices to the Outstanding Invoice page. Select the **Go to Outstanding** button to quickly maneuver to the page showing outstanding invoices. The user can also go to Outstanding Invoice by selecting *Billing/Invoice/Outstanding Invoices*.

OUTSTANDING INVOICES

Select the Branch (if more than one), Payment Source and then select **Generate** to pull the created invoices. Filter by Text will filter the generated list by keyword search.



The generated invoices display the following summary information:

Invoice #, MRN, Client Name, Is Verified, Invoice Date, Due Date, Amount Due, Net Due and the invoice Date Range. In addition, options to **Print** the Outstanding Invoice List or **Export** the list to Excel are available.

Outstanding Invoices

Branch: Dallas Payment Source: Private(Self) Pay

Filter by Text: Start Typing

Generate Print Excel Export

Group by Branch Group by Payer

Invoice #	MRN	Name -	Is Verified	Date	Due date	Amount Due	Net Due	Range	Action
4018	RM050820	WING, DANIEL	✗	06/15/2020	07/15/2020	\$0.00	\$0.00	05/01/2020 - 05/31/2020	[Print] [Verify/Edit] [Delete]
4015	love123	ADAM, BILDAD	✓	06/10/2020	06/25/2020	\$10.00	\$10.00	06/10/2020 - 06/10/2020	[Print] [Verify/Edit] [Delete]
4002	83834	PROO, DANE	✗	05/27/2020	06/11/2020	\$50.00	\$50.00	05/17/2020 - 05/23/2020	[Print] [Verify/Edit] [Delete]
3939	JST_1989	MALONE, DUKE	✗	02/09/2020	02/24/2020	\$0.00	\$0.00	12/29/2019 - 02/08/2020	[Print] [Verify/Edit] [Delete]

Bulk Print Mark As Seen

Invoices that are unverified have the following actions: **Print**, **Verify/Edit** or **Delete**.

	Action
/2017	[Print] [Verify/Edit] [Delete]
/2017	[Print] [Verify/Edit] [Delete]
/2017 - 07/06/2017	[Print] [Verify/Edit] [Delete]

Select the client's **Name** to open the invoice for verification.

Outstanding Invoices

Branch: Dallas Payment Source: Private(Self) Pay

Filter by Text: Start Typing

Generate Print Excel Export

Group by Branch Group by Payer

Invoice #	MRN	Name -	Is Verified	Date	Due date	Amount Due	Net Due	Range	Action
4018	RM050820	WING, DANIEL	✗	06/15/2020	07/15/2020	\$0.00	\$0.00	05/01/2020 - 05/31/2020	[Print] [Verify/Edit] [Delete]
4015	love123	ADAM, BILDAD	✓	06/10/2020	06/25/2020	\$10.00	\$10.00	06/10/2020 - 06/10/2020	[Print] [Verify/Edit] [Delete]

The Edit Invoice page displays the details of the invoice and provides editing as needed. Required fields are indicated with a red asterisk (*). During invoice verification, select Invoice Notes in the top right corner to review invoice notes. **Add**, **Edit** or **Resolve** invoice notes using the respective buttons/hyperlinks.

The top sections display the Payment Source and date Range of the invoice along with modifiable input of Terms, Date and Due Date the Client Address

displays from the Client Profile. The Billing address defaults to the client's address but may be updated to other contact payers.



The lower half of the invoice will display billing line items. Select the **Refresh Pre-defined Services/Tasks** button to get an updated list. The Quantity and Rate are editable by selecting the field. Comments are also available to enter.

Click "Save or Save & Print" to save any edits and adds you make on this grid.

Pre-defined Services/Tasks							Refresh Pre-defined Services/Tasks		
#	Preferred Name	Comments	Visit Date	Hours	QTY	Rate	Amount		
1	<input checked="" type="checkbox"/> HHA Care Plan		05/09/2020	12:00 am - 12:01 am	0	\$ 0.00	\$ 0.00		

The last section provides the ability to add custom service charges. Select the **Add Custom Service/Task** hyperlink to enter the applicable charges. Add any applicable tax or Remarks

- Select **Save** to complete the verification.
- **Save & Print** to complete and print the invoice.
- **Close** cancels any changes.

Custom Services/Tasks								
#	Service/Task Description	Comments	Visit Date	Hours	QTY	Rate	Amount	
✘ 1	<input type="text"/>	<input type="text"/>	05/01/2020	12:00 AM - 07:45 AM	<input type="text"/>	<input type="text"/>	\$ 0.00	

Total : \$ 0.00
 Tax : \$0
 Amount Due : \$ 0.00

Remark

Verified invoices contain a green check mark in the Verified column. Once verified, a selection field is activated and the available actions are updated with additional options of **Send** and **Receive Payment**.

		<input type="checkbox"/> Group by Branch <input type="checkbox"/> Group by Payer											
Line #	Is Verified	Date	Due date	Amount Due	Net Due	Range	Action						
001	✔	06/10/2020	06/25/2020	\$10.00	\$10.00	06/10/2020 - 06/10/2020	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
002	✘	05/27/2020	06/11/2020	\$50.00	\$50.00	05/17/2020 - 05/23/2020	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
003	✘	02/09/2020	02/24/2020	\$0.00	\$0.00	12/29/2019 - 02/08/2020	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

There are several options available to submit invoices to Payment Sources. Under Actions:


- **Send** enables users to email the invoice to a payer.
- **Print** enables users to individually print an invoice for mailing. Once printed, the user updates the invoice status by selecting **Mark as Submitted**.

From the invoice list page:

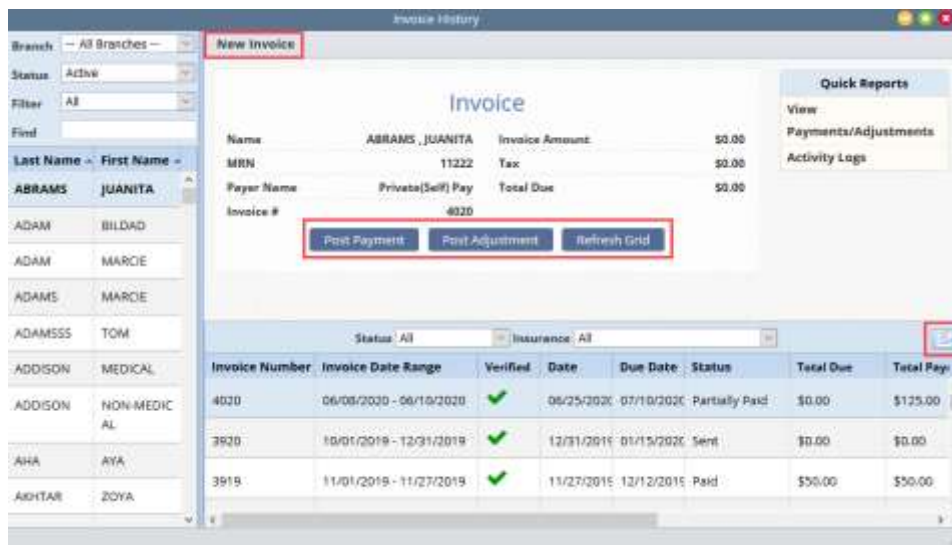
- Multi-select invoices and select **Bulk Print**. The user will have the option to combine into a PDF file or a Zip file. Either choice will compile the invoices for selection under *Reports/Completed Reports*.

- Once printed, update the invoice status by selecting the checkbox and selecting the **Marked as Submitted** button.

INVOICE HISTORY

The Invoice History page contains a list of the client's invoices. A new invoice may be added by selecting **New Invoice** at the top of the page. The  icon will expand the list over the invoice summary at the top (select again to collapse). Once an invoice is selected, a summary is displayed in the top section of the page with the options to either **Post Payment**, **Post Adjustment** or **Refresh Grid**.






The information provided in the list includes Invoice Number, Invoice Date Range, Verified, Date, Due Date, Status, Total Due, Total Payments, + Adjustments, - Adjustments, Balance Remaining and Action.



Invoice Number	Invoice Date Range	Verified	Date	Due Date	Status	Total Due	Total Pay
4020	06/08/2020 - 06/19/2020	✓	06/25/2020	07/10/2020	Partially Paid	\$0.00	\$125.00
3920	10/01/2019 - 12/31/2019	✓	12/31/2019	01/15/2020	Sent	\$0.00	\$0.00
3919	11/01/2019 - 11/27/2019	✓	11/27/2019	12/12/2019	Paid	\$50.00	\$50.00

Options under the Action column include:

- **Print** enables users to individually print an invoice for mailing.
- **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.

-Adj	Balance Remaining	Action
\$0.00		<ul style="list-style-type: none">  Print  Verify/Edit  Send  Receive Payment  Delete

Post Payment contains two required fields:

- Amount - Enter the amount of the payment. The system defaults to the net due, update as needed.
- Date - Enter the date of the applied payment.

Update Invoice Payment Information

Name	ABRAMS, JUANITA	Net Due	\$0.00
Date Range	06/08/2020 - 06/10/2020	Total Payments	\$125.00
Invoice Date	06/25/2020	Total Adjustments	\$0.00
Due Date	07/10/2020	Balance	\$-125.00
Total	\$0.00	Amount	<input type="text"/>
Tax	\$0.00	Date	<input type="text" value="MM/DD/YYYY"/>

Comments

You have 130 characters remaining

Post adjustment contains three required fields:

- Amount - Defaults to the invoice balance. Update as needed.
- Date - Indicate the date of the adjustment.
- Adjustment Code - Choose the adjustment reason.

Quick Reports

Quick Reports are shown to the right of the client information. Select **Activity Logs** to see when the invoice was updated and by whom.

User Name	Action Description	Date
Sumitra Maharjan RN	Claim/Invoice Updated.	7/14/2020 3:38 PM
Sumitra Maharjan RN	Claim/Invoice Updated.	7/14/2020 3:37 PM
Justyn Pisarsky RN	Claim/Invoice Updated.	6/26/2020 9:42 AM
Justyn Pisarsky RN	Payment Added.	6/26/2020 9:35 AM
Justyn Pisarsky RN	Payment Added.	6/26/2020 9:35 AM

MANAGED CARE/OTHER INSURANCE

The Managed Care/Other Insurances category contains four sub-menus:

1. Create Claims - Used to create claims for payers billing UB04, HCFA 1500 or ANSI Text File.
2. Outstanding Claims - Once claims are created, they move into the outstanding claims page for review and submission options.
3. Claims History - View and update claims. Features include the ability to view existing client claims post and view payments and adjustments, view the claim in UB04, HCFA 1500 or ANSI format, update claim status' as well as create a new claim.
4. Claim Submission History - Ability to view submission date, batch number, clients included in a batch and claim responses.

CREATE CLAIMS

Billing/Managed Care/Other Insurances/Create Claims

Choose the Branch (if more than one), Payment Source(s) and date range for which claims are being created. Select **Generate**, then the system will generate a list of claims that match the requested parameters.

Claims identified as having overlapping claim dates will be highlighted in orange. These claims may be excluded from the list by selecting the "Exclude Overlapping Claims" box.

Select the claims to be created and select **Create Claims**. This action moves the claims into the Outstanding Claims page. Users may select the quick link **Go to Outstanding** to navigate to the claim list.

Create Claims | Axxess Testing Agency

Branch: -- All Branches -- Payment Source: -- All Payment Sources --

From: 07/13/2020 To: 07/27/2020


Clients with overlapping claim

Exclude Overlapping Claims

MRN	Client Name	Payment Source	Start Date	End Date
<input checked="" type="checkbox"/> 00003	ADAM, MARCE	AA Insurance	07/13/2020	07/27/2020
<input type="checkbox"/> JC07222020	AL-JAMIL, TAHANI	Medicaid Texas	07/13/2020	07/27/2020
<input checked="" type="checkbox"/> 343445	ALE, SANTOSH	Aetna	07/13/2020	07/27/2020
<input checked="" type="checkbox"/> 343445	ALE, SANTOSH	Aetna	07/13/2020	07/27/2020
<input type="checkbox"/> 58072120	BANNER, BRUCE	Medicaid Texas	07/13/2020	07/27/2020
<input type="checkbox"/> amahr456	HARRIS, AMANDA	Texas Medicaid	07/13/2020	07/27/2020
<input type="checkbox"/> 534512	HARRIS, DOVER	Texas Medicaid	07/13/2020	07/27/2020

Create Claims

OUTSTANDING CLAIMS

The outstanding claim list will display all generated claims requiring verification to the bill. The summary list contains the Client Name, MRN, Date Range and the four verification pages of the claim (Detail, Visit, Supply and Verified). The next column is for claim notes. A grey 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. The last column is the  icon for viewing and downloading the claim.

Outstanding Claims | Axxess Testing Agency

Branch: Dabac Payment Source: AA Insurance

When a claim has been fully verified it can be marked as submitted.

#	Client Name	MRN	Date Range	Detail	Visit	Supply	Verified	
<input type="checkbox"/> 1	JOHNSON, RYAN	22222	07/22/2020 - 07/22/2020	✓	✓	✓	✓	
<input type="checkbox"/> 2	JOHNSON, RYAN	22222	07/21/2020 - 07/21/2020	✓	✓	✓	✓	
<input type="checkbox"/> 3	JOHNSON, RYAN	22222	07/14/2020 - 07/14/2020	✓	✓	✓	✓	
<input type="checkbox"/> 4	JOHNSON, RYAN	22222	07/13/2020 - 07/13/2020	✓	✓	✓	✓	
<input type="checkbox"/> 5	ADAM, MARCE	00003	07/01/2020 - 07/22/2020	✓	✓	✓	✓	
<input type="checkbox"/> 6	JOHNSON, RYAN	22222	06/10/2020 - 06/10/2020	✓	✗	✗	✗	
<input type="checkbox"/> 7	JOHNSON, RYAN	22222	06/06/2020 - 06/06/2020	✓	✓	✓	✓	
<input type="checkbox"/> 8	JOHNSON, RYAN	22222	05/31/2020 - 05/31/2020	✓	✗	✗	✗	

Selecting the **Client Name** opens the claim for verification.

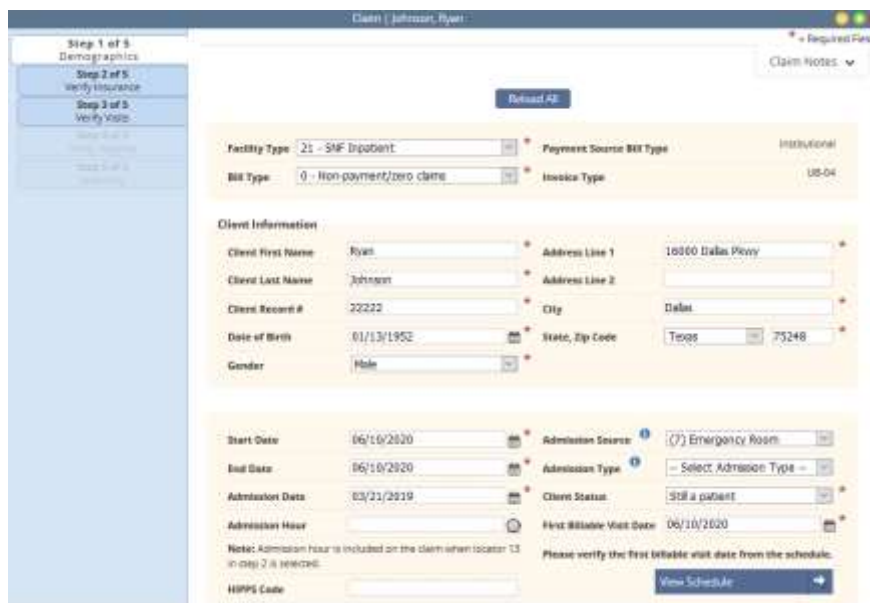
#	Client Name	MRN	Date Range -	Detail
1	JOHNSON, RYAN	22222	07/22/2020 - 07/23/2020	✓
2	JOHNSON, RYAN	22222	07/21/2020 - 07/21/2020	✓
3	JOHNSON, RYAN	22222	07/14/2020 - 07/14/2020	✓

Step 1 - Demographics

Required field completion includes:

- Facility & Bill Type - This defines what type of bill the invoice is. For example: First claim, continuing claim.
- Client Information - Includes Client Name, Address, DOB, Gender and Client Record #.
- Start and End Dates - Indicates the date range of the claim.
- Admission Date - Start of Care date.
- First Billable Visit Date - The first billable visit in the claim. Select the **View Schedule** button to verify the first billable visit date from the schedule.
- Client Status - Client's status during the claim date range.
- Diagnoses - A Primary Diagnosis is required. Non-required fields include Additional Diagnoses, condition codes and remarks. Ensure population of these if required by the payer.

Also, enter optional Condition Codes and Remarks. Then select the **Verify & Next** button to move to the next step.



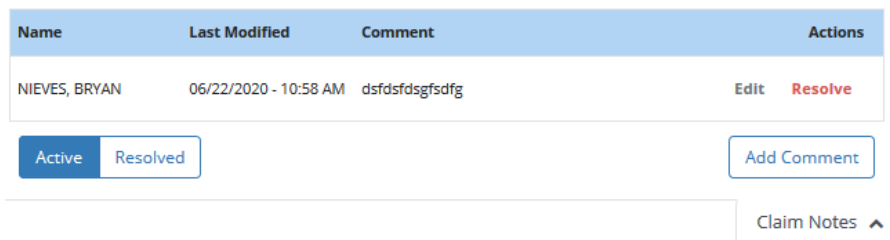
Select the **Claim Notes** button to enter claims throughout the claim verification screens in the top right of the page.



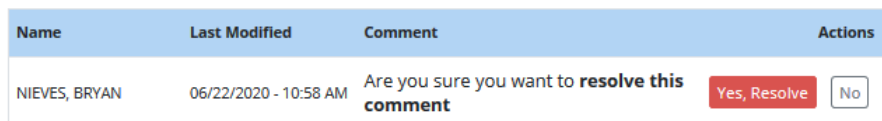
Once the section expands, select the **Add Comment** button. Enter comments in the Add Comment box and select the **Save & Close** button. Select **Save & Add Another** to save and continue adding comments or **Cancel** to exit without saving comments.



To resolve a comment, select the **Resolve** hyperlink under the Actions column. Select the **Edit** hyperlink to make updates.

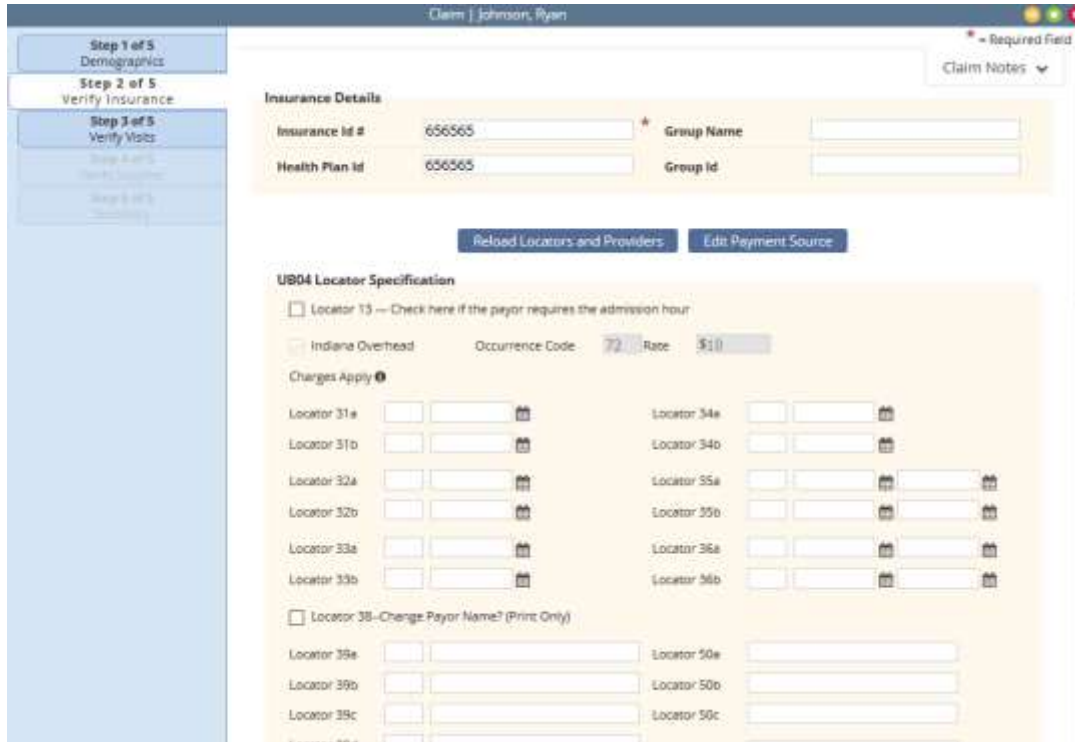




Select the **Yes, Resolve** button to confirm resolving the comment.



Step 2 - Verify Insurance

Insurance details pull from the client file. Locator Information (UB or HCFA), Add/Edit locator information as needed. The values displayed pull from the payment source setup. If changes have been made to the payer, select **Reload Locators and Providers** to pull the new requirements into the claim. Select the Edit Payment Source button to make updates to the payer.



The lower half of the screen displays additional providers and all rates that have been loaded for the insurance. Select the **Add Provider** button to add a provider, which includes the Qualifier, Locator File, Value Source, Other ID Qualifier, NPI, Other ID, Taxonomy Code and First and Last Name. To add a task rate, select the **Add Task Rate** button and include the Task, Preferred Description and Service Unit Type. Select the **Save & Exit** button to complete. Select the  icon to make updates or  icon to remove existing task information as needed. Select the **Verify and Next** or **Next** button to continue to Step 3.

[Add Provider](#) →

Qualifier	Locator Field	Value Source	NPI	Taxonomy Code	First Name	Last Name	
82 - Render	HCFA - 24j	Rendering C					✖
DIW - Refers	HCFA - 17	Primary Phys	1255300018		Dean	Cabansang	✖

[Reload Task Rates](#)
[Add Task Rate](#)

Task	Description	Rev. Code	HCPCS	Expected	Rate	Unit Type	Modifiers	Time Limit	Action
Hospice Aide Visit	Hospice Aide Visit			\$37.00	\$37.00	Hourly		1:0	✖

[Back](#) [Verify and Next](#) [Next](#)

Step 3 - Verify Visits

The claim date range displays at the top of the page for reference. Tasks group into the following categories:

- Billable Tasks - Lists all completed tasks that fall within the claim date range. All billable tasks are selected by default. Task description and diagnosis pointers may be edited.
- Incompleted Tasks - Displays all outstanding billable tasks that fall within the date range.
- Unauthorized Tasks - Lists all completed tasks that fall outside authorization parameters. Users may elect to ignore the authorization warning and bill anyway.
- Tasks with no associated rate - Indicates tasks that were completed that are missing insurance rates.
- Overlapping claim - Lists tasks that are associated to a claim that overlaps date range.



If no tasks fit a category, the category will not display.




Actions include:

- **Back** navigates back to step 2.
- **Reload** reloads the page after changes were made.
- **Verify and Refresh** verifies the tasks and refreshes the page.
- **Verify and Next** verifies the tasks and navigates to step 4.
- **Next** navigates to step 4 without verifying the tasks.

Claim: J. Johnson, Ryan

Date Range: 06/10/2020 - 06/10/2020

If your payment source requires a specific description for your tasks on this claim, click on the  to edit the description. Line items with a  next to them are related to a task above them. This means they are either the travel time or the result of a visit with a time limit. Line items with number on them are the lines that will show on the claim when billed. Select Verify and Refresh to view updated charge amounts after editing units for hourly, per 15 min and specified minute line items.

BILLABLE TASKS						
Visit Description	Visit Date - Time	HCPCS	Rev Code	Modifiers	Diagnosis Pointers	Status
Charge						
Skilled Nursing <input type="checkbox"/> Check All						
<input checked="" type="checkbox"/> HH Aide Visit W/M - RA 	06/10/2020 2:30 PM - 3:30 PM	3231	3456	35 45 45 54 	ABC 	Completed
\$100.00						

UNAUTHORIZED TASKS				
Visit Type	Scheduled Date	Visit Date	Assigned To	Status
<input type="checkbox"/> PAS Note - W & M RA	06/10/2020	06/10/2020	Ramalkar Axxess RN	Missed Visit(Complete)

Buttons: Back, Reload, Verify & Refresh, Verify & New

Step 4 - Verify Supplies

Recorded supplies (billable and non-billable) display and can be added, edited, removed and marked as billable and non-billable.

Claim: J. Johnson, Ryan

Date Range: 06/10/2020 - 06/10/2020

Buttons: Add New Supply, Mark As Non-Billable, Delete

Note: Click on the checked box to make the appropriate selection.

BILLABLE SUPPLIES							
Revenue Code	Description	HCPCS	Date	Unit	Unit Cost	Total Cost	Action
<input type="checkbox"/> 1243	Humidifier, durable for extensive supplemental humidification during IPPS treatments or oxygen delivery	E0550	06/10/2020	1	\$200.00	\$200.00	Edit

Buttons: Mark As Billable, Delete

Note: Click on the checked box to make the appropriate selection.

NON-BILLABLE SUPPLIES							
Revenue Code	Description	HCPCS	Date	Unit	Unit Cost	Total Cost	Action
<input type="checkbox"/> 1234	Cane, includes canes of all materials, adjustable or fixed, with tip	E0100	06/10/2020	1	\$100.00	\$100.00	Edit

Buttons: Back, Verify & New

Select the **Add New Supply** button to add a supply to the claim. Enter the Description, Revenue Code, HCPCS, Date, Unit and Unit Cost. Then select the **Add Supply** button.

Description	Start Typing
Revenue Code	
HCPCS	
Date	
Unit	
Unit Cost	-\$
Total Cost	

Check the box next to a supply then select the **Mark as Non-Billable**, **Delete** or **Mark as Billable** buttons. To make changes to the supplies, select the **Edit** hyperlink to the right of the supplies. Select **Verify and Next** to go to step 5.

Step 5 - Claim Summary

Provides a summary review of the claim. Select **Complete** to finish the verification process.

Claim | Johnson, Ryan
Claim History

Step 1 of 5
Demographics

Step 2 of 5
Verify Insurance

Step 3 of 5
Verify Units

Step 4 of 5
Verify Supplies

Step 5 of 5
Summary

Client First Name	Ryan	Care Period Start Date	06/10/2020
Client Last Name	Johnson	Admission Date	05/21/2019
Payment Source Plan Id	030243	Address Line 1	16000 Delta Pkwy
Client Record #	22222	Address Line 2	
Gender	Male	City	Dallas
Date of Birth	01/13/1952	State, Zip Code	TX, 75248

HCPCS Code	Diagnosis Codes
QASB Matching Key	Admission
Date Of First Billable Visit	Primary
Network	Second
	Third
	Fourth
	Fifth
	Sixth

Rev Code	Description	HCPCS/HRPG Code	Service Date	Service Unit	Total Charges
1242	Number of durable for extensive supplemental lumbarization during (PP) services or oxygen delivery	03000	06/10/2020	1	\$200.00
3404	WHAde Visit W&A - SA	2022 35 40 40 24	06/10/2020	1.00	\$100.00

Claim Total \$300.00

A green checkmark displays when the verification is completed for the pages. Once all checkmarks are present, a selection field presents to the left of the claim.

Outstanding Claims | Axxess Testing Agency

Branch: Payment Source:

When a claim has been fully verified it can be marked as submitted.

#	Client Name	MRN	Date Range	Detail	Visit	Supply	Verified
<input checked="" type="checkbox"/> 1	JOHNSON, RYAN	22222	07/22/2020 - 07/22/2020	✓	✓	✓	✓
<input type="checkbox"/> 2	JOHNSON, RYAN	22222	07/21/2020 - 07/21/2020	✓	✓	✓	✓
<input type="checkbox"/> 3	JOHNSON, RYAN	22222	07/14/2020 - 07/14/2020	✓	✓	✓	✓

Buttons:

Claim submission options depend on the payment source setup. Options include:

1. Electronic Submission - Electronic submission to a clearinghouse by selecting **Submit Selected Electronically**.
2. Download - Users download the claims and then upload to the payer portal or clearinghouse. Once the claim/s are downloaded, the user must mark the claims as submitted to remove them from the outstanding claim page.
3. Bulk Print - Enables users to print multiple claims for mailing.
 - a. Select all the desired claims then select **Bulk Print**. The user will have the option to combine into a PDF file or a Zip file. Either choice will compile the claims for selection under *Reports/Completed Reports*.
 - b. Once printed, update the claim status by **Marking Selected as Submitted**.

<input type="checkbox"/> 17	GOMEZ, HENDRY	M4859	07/22/2020 - 07/22/2020	✓	✓	✓	✓
<input type="checkbox"/> 18	GOMEZ, HENDRY	M4859	07/21/2020 - 07/21/2020	✓	✓	✓	✓
<input type="checkbox"/> 19	FLAGSTONE, FRANK	87996	07/14/2020 - 07/14/2020	✗	✗	✗	✗


Buttons:

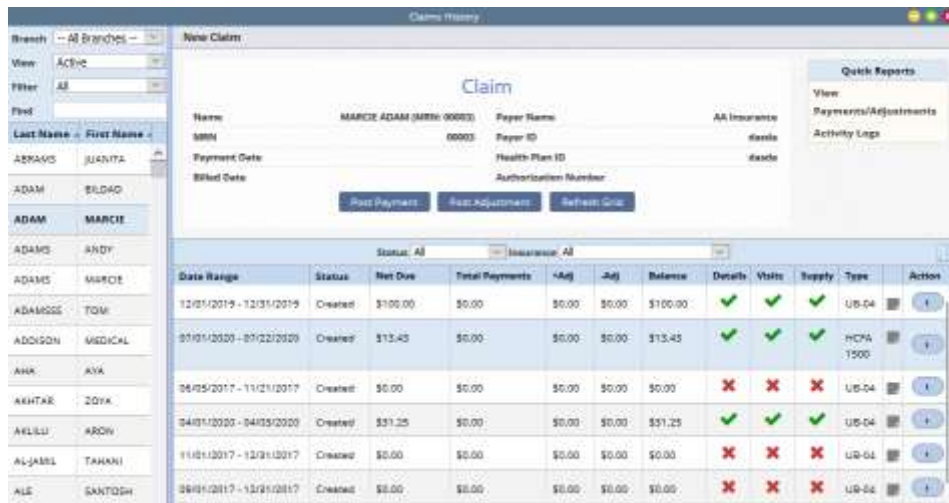
<input type="checkbox"/> 5	HARDISON, APRIL	1234567890	07/22/2020 - 07/22/2020	✓	✓	✓	✓
<input type="checkbox"/> 6	HARDISON, APRIL	1234567890	07/21/2020 - 07/21/2020	✗	✗	✗	✗
<input type="checkbox"/> 7	HESED, LEAH	LH234	07/22/2020 - 07/22/2020	✗	✗	✗	✗
<input type="checkbox"/> 8	HESED, JONATHAN	00444	07/21/2020 - 07/21/2020	✗	✗	✗	✗

Buttons:

Which format would you like the Bulk Print to be in?

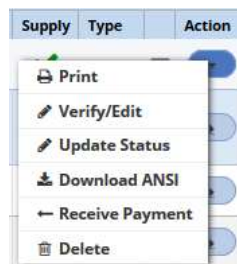
CLAIMS HISTORY

The Claims History page contains the list of a client's claims. For convenience, a new claim may be added by selecting **New Claim** at the top of the page. The  icon will expand the list over the claim summary at the top. Select a claim and a summary will then display in the top section of the page with options to either **Post Payment** or **Post Adjustment**. The information provided in the list includes Date Range, Status, Net Due, Total Payments, + Adjustments, - Adjustments, Balance Detail/Visits/Supply, Claim Type, Claim Notes and Action.



Available action items depend on the claim status. Most include the ability to:

- Print - To print a paper copy of the claim.
- Verify/Edit - To review/update the claim verification process.
- Update Status - This is the available status which varies depending on the current claim status.
- Download ANSI - Enables users to download the ANSI (text) file for review or submission.
- Receive Payment - This is available once a claim has been submitted.
- Delete - Enables users to remove the claim.



Post Payment contains two required fields:

- Payment Amount - Enter the amount of the payment. The system defaults to the net due, update as needed.
- Payer - Indicate the payer the received payment is from.
- Other available fields include Payment date, Check/RA number the payment is part of, Check Amount and any comments.

Select the **Save** button to complete. The claim status will automatically update based on the outstanding balance and includes paid, partially paid and overpaid.

A screenshot of a web form titled "Post Payment". The form contains several input fields: "Payment Amount" with a dollar sign prefix and a red asterisk; "Payment Date" with a calendar icon; "Payer" with a dropdown menu showing "Medicaid Texas UB04" and a red asterisk; "Check/RA Number"; "Check Amount" with a dollar sign prefix; and a "Comments" section with a large text area. At the bottom of the form are two buttons: "Save" and "Edit".

Post Adjustment contains three required fields:

- Amount - Indicates the amount of the adjustment.
- Adjustment Code - Indicates the adjustment reason.
- Other available fields include Date, Check/RA Number and amount as well as any applicable comments.

A screenshot of a web form titled "Post Adjustment". The form contains several input fields: "Adjustment Amount" with a dollar sign prefix and a red asterisk; "Adjustment Date" with a calendar icon; "Check/RA Number"; "Check Amount" with a dollar sign prefix; "Adjustment Code" with a dropdown menu showing "-- Select Code --" and a red asterisk; and a "Comments" section with a large text area. At the bottom of the form are two buttons: "Save" and "Edit".

Claim Quick Reports

To the right of the client information are quick reports associated with the claim selected. This allows the user to view payments and adjustments posted to the claim and an activity log showing when the claim was updated and by whom.



View Payments/Adjustments

- Displays all payments and adjustments associated with the claim with the ability to **Update** or **Delete** if needed.
- Users may also quickly add a **New Payment** or **New Adjustment** from this page.



Date	Amount	Type	Payer	Comment	Action
07/23/2020	\$340.00	Payment	AA Insurance		Update Delete

Activity Logs

Shows who and when made changes to claims.

User Name	Action Description	Date
Cj Pierson RN	Payment Deleted.	7/23/2020 3:32 PM
Cj Pierson RN	Payment Added.	7/23/2020 3:32 PM
Cj Pierson RN	Payment Added.	7/23/2020 3:32 PM
Keshia Moore RN	Managed Claim Summary Verified.	7/23/2020 8:48 AM
Keshia Moore RN	Managed Claim Supply Verified.	7/23/2020 8:48 AM


Close

CLAIM SUBMISSION HISTORY

Claims that are electronically submitted will populate to the Claim Submission History page. This menu enables users to review batches of claims, the response files and the claims within the batch. Select the Branch (if more than one), Payment Source and Date Range, then select **Generate** to narrow return results. The summary line item displays the Batch ID, Payer, Submission Date, Number of Claims in the batch and an action column from which the user may elect to **View Claims**, **Export** or view the **Response**.



Batch Id #	Payer	Submission Date	Number of Claims	Action
500011508	Texas Medicaid	07/17/2020	1	View Claims Export Response
500011509	Texas Medicaid	07/17/2020	1	View Claims Export Response
500011555	Texas Medicaid	07/17/2020	1	View Claims Export Response
500122997	Blue Cross Blue Shield PPO	05/29/2020	1	View Claims Export Response

Selecting the  icon next to the batch will display the list of claims included in the batch. Information includes the MRN, Client, Type, Claim Date Range, Date Created, Claim Amount and access to view the claim by selecting the hyperlink.



Batch Id #	Payer	Submission Date	Number of Claims	Action		
500130872	Blue Cross Blue Shield PPO	07/14/2020	1	View Claims Export Response		
MRN	Client	Type	Claim Date Range	Date Created	Claim Amount	HCFA
83834	PROD, DANE	091	07/12/2020 - 07/13/2020	07/14/2020	\$200.00	HCFA

Response File

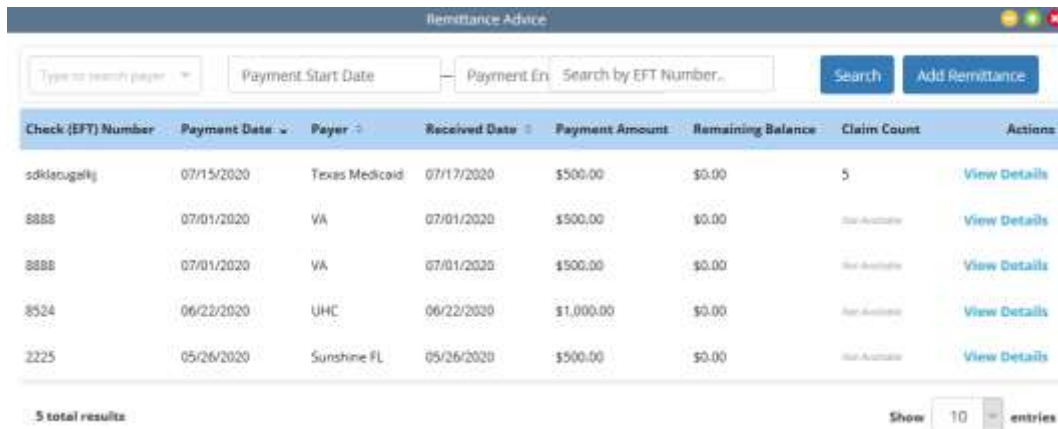
Select the **Response** hyperlink to the right of the claim. The response file will provide a summary at the top and then list the claims within. Users can **Close** or **Print** upon viewing. It will list the total number of claims submitted and the number accepted and rejected and provide charges associated with each.



REMITTANCE ADVICE

Remittance Advice pulls into the Home Care solution for all organizations which are set up to bill electronically through Axxess. The section is displayed by Check (EFT) Number, Payment Date, Payer, Received Date, Payment Amount, Remaining Balance and Claim Count.

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.



Remittance Advice

Type to search payer Payment Start Date Payment End Search by EFT Number **Search** **Add Remittance**

Check (EFT) Number	Payment Date	Payer	Received Date	Payment Amount	Remaining Balance	Claim Count	Actions
sdKieugelkj	07/15/2020	Texas Medicaid	07/17/2020	\$500.00	\$0.00	5	View Details
8888	07/01/2020	VA	07/01/2020	\$500.00	\$0.00	Not Available	View Details
8888	07/01/2020	VA	07/01/2020	\$500.00	\$0.00	Not Available	View Details
8524	06/22/2020	UHC	06/22/2020	\$1,000.00	\$0.00	Not Available	View Details
2225	05/26/2020	Sunshine FL	05/26/2020	\$500.00	\$0.00	Not Available	View Details

5 total results Show 10 entries

Select the **View Details** hyperlink to view the Remittance Details.

Remittance Detail

EFT **sdkladugalkj** paid on **07/15/2020**

Payment Amount \$500.00	Remaining Balance \$0.00	Number of Claims 5
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Received Date 07/17/2020	Payer Name Texas Medicaid	Provider NPI 1144569849	Provider Tax Id 123456985
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Client	TOB (Type of Bill)	Claim From	Claim To	Received On	Claim Amount	Payment Amount	Adjustment Amount	Balance
Harris, Amanda		09/18/2019	09/25/2019	07/17/2020	\$150.00	\$150.00	\$0.00	\$0.00
Harris, Amanda		05/01/2020	05/19/2020	07/17/2020	\$13.84	\$0.00	\$0.00	\$13.84
Harris, Dover		06/28/2020	06/30/2020	07/17/2020	\$8.00	\$2.00	\$0.00	\$6.00
Harris, Amanda		04/01/2020	04/15/2020	07/17/2020	\$55.35	\$0.00	\$0.00	\$55.35
Harris, Dover		07/07/2020	07/08/2020	07/17/2020	\$158.00	\$58.00	\$0.00	\$100.00

5 total results. Show 10 entries

Select the **Add Remittance** button to enter checks. Enter the Check (EFT) Number, Payer, Received Date, Payment Date and Payment Amount, then select the **Create** button to complete.

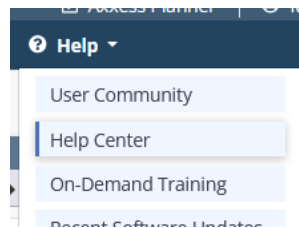
Add Remittance

Check (EFT) Number *	Payer*	Received Date*	Payment Date*	Payment Amount *
<input type="text"/>	<input type="text" value="Type to search..."/>	<input type="text" value="MM/DD/YYYY"/>	<input type="text" value="MM/DD/YYYY"/>	<input type="text" value="0.00"/>
<input type="button" value="Create"/> <input type="button" value="Create And Link"/> <input type="button" value="Cancel"/>				

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/>

