

HOME CARE BILLING TRAINING MANUAL

December 2022



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axxess.com



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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:

- <u>Create Invoices</u> Used to create invoices for private pay and payers billing on invoices.
- <u>Outstanding Invoices</u> Once invoices are created, they move into the outstanding invoice page for review and submission.
- <u>Invoice History</u> 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.

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





	Clients wi	h overlapping claim
Exclude Overlapping Invoices	Check to apply the same invoice and due date to all invoices	1

Billers may individually enter the invoice date, due date or select [checkbox] to apply the same dates to all selected invoices. If the checkbox is selected, users can enter the invoice and due dates, then select **Apply**.

Check to apply the same invoice and due date to all invoices	12/07/2022	m	12/14/2022		Apply		
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Payment terms default to the payment source set up but may be adjusted. Select the desired checkboxes, then select **Create Invoices** in the top right-hand corner. 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.

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The generated invoices display the following summary information:

Invoice #, MRN, client name, verified, invoice date, due date, amount due, net due and the invoice date range. In addition, options to group by branch or payer are available. Users can **Print** the Outstanding Invoice List or **Export** the list to Excel.

If the organization has selected to link visit documentation to invoices by selecting Admin/View tab/Payment Sources/Edit/Information tab/Billing Requirements/Payer Requires Documentation/Save, the user will see a documentation column next to verified.





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			5/4.7ml	Netta	a Servi							

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



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

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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.





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The top sections display the payment source and date range of the invoice along with modifiable input for 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.

Payment Source		United Women Delli Pop	Range		vi/micpigs/ king	NULL .		trunta	os Notes
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Billing Address									
			- Select To Charge Address		Country			General States	
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Fax Number									
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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.

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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, invoice comments, or remarks.

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







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Verified invoices contain a green check mark in the verified column. The red X under the documentation column will change to a gray printer icon, indicating that the system is gathering documentation associated with the invoice. When documentation is gathered, a green printer icon will be available for users to print associated documentation. Once verified, a selection field is activated and the available actions are updated with additional options of **Send**, **Marked as Mailed**, and **Receive Payment**.

Verified	Documentation 0	Date	Due Date	Amount Due	Net Due	Range		Action
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~	Ð	11/15/2022	11/30/2022	\$100.00	\$100.00	11/06/2 11/06/2	Mark as Maile Receive Paym Delete	1000 L

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 Mailed**.





From the invoice list page:

- Multi-select invoices and select **Bulk Print.** The user will have the option to options to include the invoice only, invoice and documentation, or invoice documentation only and select the format of 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 Sent** 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 actions.

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Options under the Action column include:

- **Print Invoice** 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.





- Mark as Mailed confirms the invoice has been mailed to the payer.
- View Payments enables users to see payments.
- **Delete** removes the invoice.



Post Payment contains two required fields:

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

Name	ABEL, AMY	Net Due		\$50.05
Date Range	03/01/2022 - 04/30/2022	Total Paymenta		\$150.15
Invoice Date	05/01/2022	Total Adjustmer	nts	\$120.05
Due Date	05/16/2022	Balance		\$19.95
Total	\$50,00	Amount	50.05	1
Tax	\$0.05	Date	MMEDDAYYYY	0
	File have 130 ch	name manod		2

Post adjustment contains three required fields:

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

<u>NOTE</u>: Adjustment Codes can be added, edited, or deleted in *Admin/Lists/Adjustment Codes* by a user with Admin permissions.





Selecting **Deposit** at the top of the page allows the user to add deposit payments made to the client's account.

		10.1	52 C		Quick Reports
		Invoice			View
	Name	ABEL, AMY	Invoice Amount	80.00	Payments/Adjustments
	MRN	AA74800	Tex	\$0.00	Activity Logo
	Payer Name	Default Private (Self) Pay	Total Due	\$0.00	
	Invoice #	4568			
		Payment Post Adjustment	Credit Transfer/Refund Refresh Grid		

The list shows amount, balance, deposit date, payer, type, comments, and actions. Select + to the left-hand side of the row to view deposit details. This includes comments, amount applied, date applied, employee who entered the deposit, and type. Select **Add Deposit** to enter a new deposit.

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۲	301	0	(1/54/2520)	ATEL, AMT	Dwcł		

Users can enter the deposit amount, date received, payer, deposit type, and comments. Select **Save & Close** to go back to the list or **Save & Add Another**. Select **Cancel** to return to the deposit screen.

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Once a deposit is added, the user can choose to either **Post** or **Refund** the amount added from the Actions column.





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If **Post** is selected, the screen will display the invoice number, invoice date range, balance due and amount to apply. User can add the desired amount to apply to each invoice then select **Apply**. Select **Cancel** to close.

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Amount	Balarco	Geposit Data	Japas	Туре	Comment	Activ
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	02/01/	2022 - 04/30/2022	79		10	
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If **Refund** is selected, add the amount to refund, select refunded via check or credit, and add any comments. Select **Complete & Close** to record the refund or **Cancel** to close.

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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	
Habiba Iliyasu RN	Invoice has been Sent.	01/21/2022 6:25 AM	
joy Pelingon	Payment Added.	12/13/2021 10:57 AM	
Crystal Buffington RN	Invoice has been mailed.	08/12/2021 9:49 AM	
Dimple Mistry RN	Claim/Invoice Updated.	07/23/2021 2:22 PM	
Mico Cruz RN	Claim/Invoice Added.	07/09/2021 1:52 PM	

MANAGED CARE/OTHER INSURANCE

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

- 1. <u>Create Claims</u> Used to create claims for payers billing UB-04, HCFA 1500 or ANSI Text File.
- 2. <u>Outstanding Claims</u> Once claims are created, they move into the outstanding claims page for review and submission options.
- 3. <u>Claims History</u> View and update claims. Features include the ability to view existing client claims post and view payments and adjustments, view the claim in UB-04, HCFA 1500 or ANSI format, update claim status' as well as create a new claim.
- 4. <u>Claim Submission History</u> 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.





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OUTSTANDING CLAIMS

The outstanding claim list will display all generated claims requiring verification to the bill. The summary list contains the client's name, MRN, date range and the four verification pages of the claim (detail, visit, supply and verified). The Documentation column will display a red X prior to the claim being completed. Once the associated documentation is available to print, select the green printer icon. 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 is the icon for viewing and downloading the claim.

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

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	4	ARHTAR, PALERIA	KB05272020	12/20/2029 - 12/26/2020	×	×

Step 1 - Demographics

Required field completion includes:

- <u>Facility and Bill Type</u> This defines what type of bill the invoice is. For example: First claim, continuing claim.
- <u>Client Information</u> Includes client name, address, DOB, gender and client record number.
- <u>Start and End Dates</u> Indicates the date range of the claim.
- <u>Admission Date</u> Start of care date.
- <u>First Billable Visit Date</u> The first billable visit in the claim. Select the **View Schedule** button to verify the first billable visit date from the schedule.
- <u>Client Status</u> Client's status during the claim date range.
- <u>Diagnoses</u> 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.

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

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			No Comments to display	

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.

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

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

Name	Last Modified	Comment			
PARTIDA, (ESSICA	13/13/2022 - 11/12 PM		Are you sure you want to resolve ?	Yes, Hensler	14m

The **Reload All** button resets all changes made to the claim. Any prior claim updates will be lost if **Yes** is selected. Selecting **No** will close the box.





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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.

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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 **Save**





updates or si icon to remove existing task information as needed. Select the **Verify and Next** or **Next** button to continue to Step 3.

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Step 3 - Verify Visits

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

- <u>Billable Tasks</u> 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.
- <u>Incomplete Tasks</u> Displays all outstanding billable tasks that fall within the date range.
- <u>Unauthorized Tasks</u> Lists all completed tasks that fall outside authorization parameters. Users may elect to ignore the authorization warning and bill anyway.
- <u>Tasks with no associated rate</u> Indicates tasks that were completed that are missing insurance rates.
- <u>Overlapping claim</u> 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.

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Step 4 - Verify Supplies

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

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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.



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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.

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A green checkmark displays when the verification is completed for the pages. Once all checkmarks are present, a selection field is present to the left of the claim. The documentation column displays the associated documentation that is available to print with a green printer icon.





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

- 1. <u>Electronic Submission</u> Electronic submission to a clearinghouse by selecting **Submit Selected Electronically**.
- <u>Download Selected Claims</u> 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.
- Mark Selected as Submitted Enables users to update the status of the claim to submitted.
- 4. <u>Mark Selected as Mailed</u> Enables users to update the status of the claim to mailed.
- 5. 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 **Mark Selected as Submitted**.

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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 actions.

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







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



Post Payment contains two required fields:

- <u>Payment Amount</u> Enter the amount of the payment. The system defaults to the net due, update as needed.
- <u>Payer</u> 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.

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Post Adjustment contains three required fields:

• Adjustment Amount - Indicates the amount of the adjustment.





- <u>Adjustment Code</u> Indicates the adjustment reason.
- Other available fields include date, check/RA Number and amount as well as any applicable comments.

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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.

		1		Quick Reports
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Name	ABRAMS, JUANITA	Payer Name	UB-04	Payments/Adjustments
MRN	11222	Payer ID	001	Activity Logs
Payment Date	01/01/2001	Health Plan ID	001	
Billed Date	01/05/2022	Authorization Number		
	Post Payment Post Ac	ljustment Refresh Grid		

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.





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Payne Name			Artist HUTA	Avenues Danse			
				Over Dates			
			Inclusion Inc	CONTRACTOR OF TAXABLE PARTY.			
Dalle +	EFPOhea-	Arrian	Type	Adjustment Code	Faper	Contart	Action
16/07/2528 07/14/2521		#80.0p	Payment)		Antra WOYA		Spelada 2 Deletta
070 Ha(2121		610.00	Adjustment	60	Artistic 1407A		upante Orbite

Activity Logs

Shows who and when made changes to claims.

User Name	Action Description	Date	
Jiman Gallian RN	Payment Deleted.	11/08/2021 1:17 PM	
jiman Gallian RN	Payment Added. (Jiman Gallian RN)	11/08/2021 1:16 PM	
Jiman Gallian RN	Adjustment Added. (Jiman Galilan RN)	11/08/2021 1:16 PM	
Jiman Gallian RN	Payment Added.	11/08/2021 1:12 PM	
Jiman Gallian RN	Payment Updated.	11/08/2021 1:11 PM	

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**.

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		Date Kange	Paperson Searce	hes. *	8191
deserve	- 12/13/000	(work-init)	 AA bitumines - ACM (HCW) 	lanchin	AB
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00 42 Array	(*	06210882	AA YOLKONOL ALM (PCPA).	10824343	
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-		16023-72012	AA YOURDESE - AUM DRENIE	000244558	
	1	07/29/2022	AA THATATAN - KAN DREAL	\$2025aataa	
	T	08/14/2121	Advenueration - ALM (HICTO)	101255hill	α
0 5 from	T	(WYWOST)	AA musano - AM (HISA)	Soldiers and	n





Selecting the **G** 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.

				Class Salestanian Hitlery			
tranches *		Payment Source		Date Range			
Al tranches	16 ⁷⁴	AA3HUMUA AUMUHERA		0005/2012	- 12/13	2028	Girmon
Batch H # *	Pape	3		Submission Date +	Péc	mber of Claim 3	Action
804243545		шталов - АСМ (НСРА)		84/21/2022	1		
/#1N	Client	Туре	Claim Date	i Rungo	Date Created	Claim Amount	Actions
Void -523	SALVATORE BOMME	111	36-05-022	- 06/06/2022	26/09/2023	:1000	1404

Response File

Select the **Response** hyperlink to the right of the claim. The response file will provide a summary list of the claims. Users can **Close** upon viewing. It will list the date received, payer, patient name, from date, patient control number, payer ID, to date, charges, status, acknowledgement type, and message.







REMITTANCE ADVICE

Billing/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 or invoice count.

Search by payer name, payment start date, payment end date and by EFT number. Once parameters are entered into the filters, select the **Search** button.

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March Addressments			Starth by DY Norther	Pagment Date trail	Pagment beloc ture:	12	turn to introduciant
Actions	Cleary/Invoice Count	Remaining Salaries	Payment Amazet	Received Liste 1	how i	Payment Data .	Check (EFT) Number
View Sectors 1971	14	9990.00	#900.08	12/07/2012	test payment new	12/07/2022	94394294
View Datable 145		\$320.00	4300.00	12/07/2022	selling slooner6	12/07/2023	1214254
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Vice betatta 641.1	16 C	90.00	\$25.00	12/04/2012	Alternative Text	13/14/25/23	01067

Select the View Details hyperlink to view the Remittance Details.

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\$500.00		s	469.00		1	i			
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Cleat *	Failent Centrel Norther	108	Claim North	Care To	Cam Amount O	Payment Amount ()	Adjustment Amount ()	Balance ()	Althe
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Infrances, April	Jalais (Dimethy/WOODC		Nanacitat	10/13/3/22	#100.00	30.08	40.00	8130.00	**** 121.
etraces Russ	304dbada67aAAcRByQGF	100	877(1/0021	1001112001	8100.00	90.00	90.09	\$10000	Ter 685.

On this page users can view and edit under Actions. Users can also choose to link or unlink claims on an EFT.

To link claims, select the **Link Claims** button. Search by client name, status, and start and end date, then select **Search**. Select the claims to link on the left of the client's name. The link claims button will show a total number of claims selected. Select **Link Claims** to add the claims or **Cancel** to close.





			Revitative (onto	8.			
EFT 88051212 pai	d on 12/06/2022						
Payment Amount		Numaining Balan	bir	Number of Claim	4 C		
\$500.00		\$469.00		7			
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Diet *	Patient Cantrol Num	nber TOB	Claimerhmenice Status	Butement From 1	Statement To 1	Gainvinsolus Ameant	Relation II
	Patient Centrol Nam		Claimon freevice Shatua Subtrictive)		Statement To (1005-2021	Gainvileenin Arrest	Reference II
		a 💮				UNIT CONTRACTORY	1.

To unlink claims, select the **Unlink Claims** button. Select the claims to unlink then select the **Unlink Claims** button or **Cancel** to close.

					8441	ance hereat				
EFT	T 88051212 p	aid on 12/06/2022								
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	3descr. R(w)	44	(19)	11/18/2020	11/18/2020	8100.00	85.00	90.00	8100.08	100
	subseco, April	same (gamefiv/water)	-	78/12/28/22	10/12/2022	8100.00	80 (D)	\$63.003	ATODO200	-

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** or **Create and Link** button to complete.

Twick (897) Number *	Payer 1	Received Date 1	Payment Date *	Payment Amount *
	hoto and user -	MMODPINIY	MALDONYW	wax







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 *Help/Help Center*.



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

AXXESS Home	Health Home Care Hospice P	alliative Staffing Revenue	Cycle Patient Engagement 🔒 Logi
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\$ Revenue Cycle	Patient Engagement	Staffing	Training and Certification

