



MODULE 3: VISIT MAINTENANCE & BILLING

*BlueCare Tennessee Employment and
Community First EVV Program*

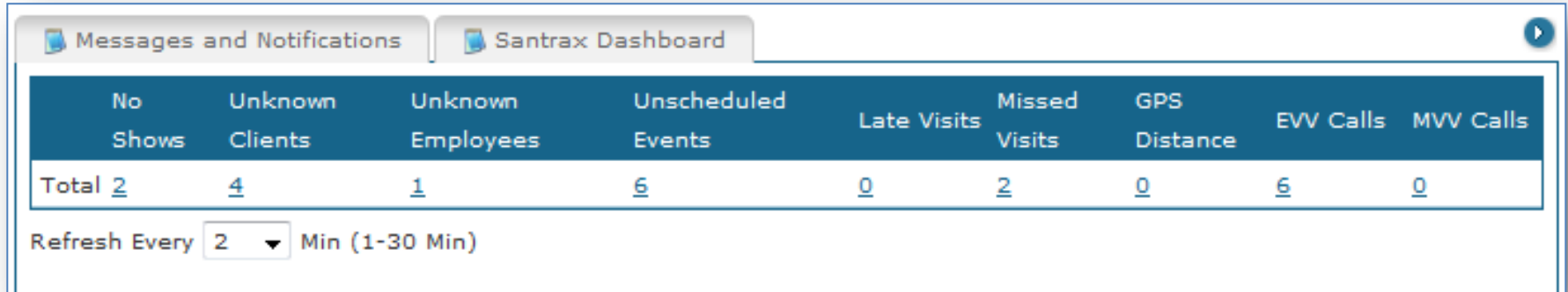
March, 2018

TOPICS

1. Visit Maintenance
2. Billing Procedures



VISIT MAINTENANCE



The screenshot shows the Santrax Dashboard interface. At the top, there are two tabs: 'Messages and Notifications' and 'Santrax Dashboard'. Below the tabs is a table with the following data:

No Shows	Unknown Clients	Unknown Employees	Unscheduled Events	Late Visits	Missed Visits	GPS Distance	EVV Calls	MVV Calls
Total 2	4	1	6	0	2	0	6	0

Below the table, there is a 'Refresh Every' dropdown menu set to '2' and a label 'Min (1-30 Min)'.

- The Santrax Dashboard appears in the top right-hand panel of the Home Screen.
- The Dashboard shows the current day's visits with six exception types.
- The drop-down box controls the screen refresh rate.
- Dashboard data should be reviewed often during the day to keep visit exceptions to a minimum.

Exceptions Types

The most frequent exceptions are as follows:

Exception Type	Description
No Shows	This exception identifies if a phone call was not received from the client's (member's) location. An email alert is also sent to the coordinator's email address a 5, 10 and 50 minutes after the scheduled time if no call is received.
Unknown Clients	Identifies calls received from telephone numbers not registered to a client in the system.
Unknown Employees	Identifies calls received where the employee ID entered does not match to anyone employee.
Unscheduled Visits	Calls received that do not match any schedule.
Late Visits	Visits considered late based on pre-defined service guidelines
Missed Visits	The final status after the visit has progressed from a "No Show" to "Late"

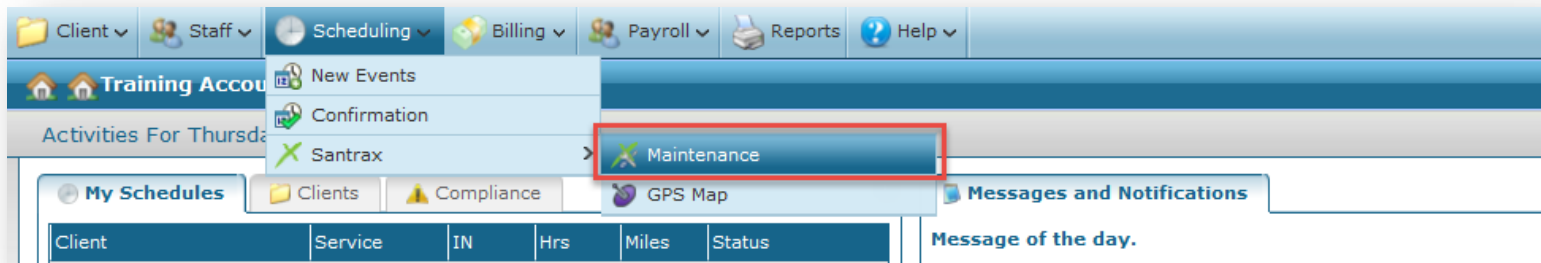
Exception Types – (continued)

Exception Type	Description
GPS Distance	Identifies visit check-ins and check-outs that occur outside of the allowable distance tolerance as defined by the program.
EVV Calls	Lists the total number of Telephony calls for the current day
MVV Calls	Lists the total number of device check-ins for the current day

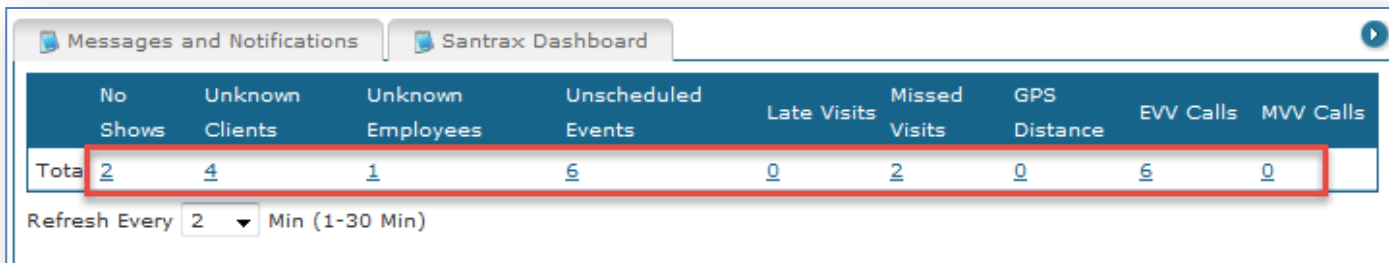
Remember: It only takes seconds to adjust schedules to prevent exceptions and prevent them from becoming missed. It takes several minutes to repair them afterwards.

Santrax Maintenance can be accessed by:

1. Selecting it from the Scheduling drop-down list



2. Clicking on a Santrax Dashboard Exception category count. The Maintenance screen will open already filtered for that exception.

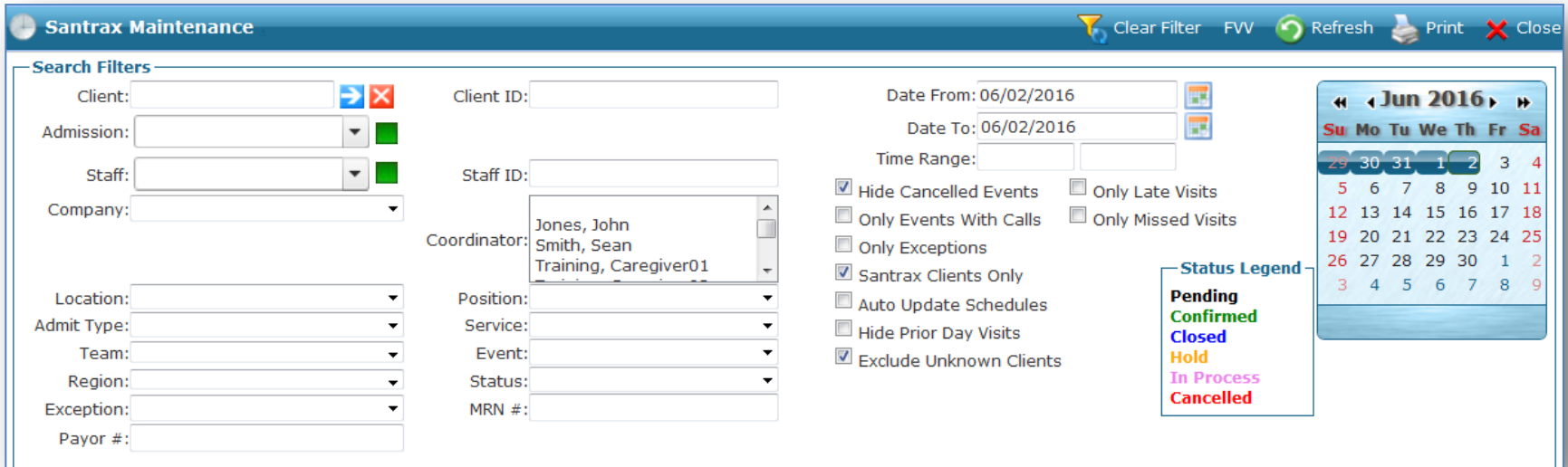


The screenshot shows the Santrax Dashboard with a table of exception counts. The table has columns for No Shows, Unknown Clients, Unknown Employees, Unscheduled Events, Late Visits, Missed Visits, GPS Distance, EVV Calls, and MVV Calls. The 'Total' row shows counts for each category. A red box highlights the 'Total' row. Below the table, there is a 'Refresh Every' dropdown set to 2 minutes and a 'Min (1-30 Min)' label.

	No Shows	Unknown Clients	Unknown Employees	Unscheduled Events	Late Visits	Missed Visits	GPS Distance	EVV Calls	MVV Calls
Total	2	4	1	6	0	2	0	6	0

Refresh Every 2 Min (1-30 Min)

Screen Filters



Santrax Maintenance

Clear Filter FVV Refresh Print Close

Search Filters

Client: [Text Box] [Clear] [X] Client ID: [Text Box] Date From: 06/02/2016 Date To: 06/02/2016 Time Range: [Text Box] [Text Box]

Admission: [Dropdown] [Green] Staff: [Dropdown] [Green] Staff ID: [Text Box]

Company: [Dropdown] Coordinator: [Multi-select list: Jones, John; Smith, Sean; Training, Caregiver01]

Location: [Dropdown] Position: [Dropdown] Service: [Dropdown] Event: [Dropdown] Status: [Dropdown] MRN #: [Text Box]

Admit Type: [Dropdown] Team: [Dropdown] Region: [Dropdown] Exception: [Dropdown] Payor #: [Text Box]

☒ Hide Cancelled Events ☐ Only Late Visits
☐ Only Events With Calls ☐ Only Missed Visits
☐ Only Exceptions
☒ Santrax Clients Only
☐ Auto Update Schedules
☐ Hide Prior Day Visits
☒ Exclude Unknown Clients

Status Legend

Pending
Confirmed
Closed
Hold
In Process
Cancelled

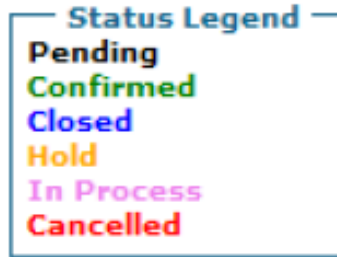
Calendar: Jun 2016

Su	Mo	Tu	We	Th	Fr	Sa
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2
3	4	5	6	7	8	9

When the Maintenance screen opens, no data is displayed. Use the filters to specify the data to view.




- Client: Client last name
- Staff: Employee last name
- Company: If multiple
- Staff ID: Employee Agency ID
- Coordinator: Multi-select list
- Status: Hold, In-Process
- Service: HHA, LPN, OT, etc...
- Date: Enter From and To dates
- Exclude Unknown Clients:
Uncheck to include unknown clients

Status Legend



- **Pending (Black)**: Indicates the visit is not yet confirmed.
- **Confirmed (Green)**: Validation through MVV, Telephony or manually that the visit occurred.
- **Closed (Blue)**: Both Billing and Payroll exports have occurred.
- **Hold (Orange)**: Indicates the visit contains an exception that must be corrected.
- **In Process (Lavender)**: Indicates the visit was either processed for Billing or Payroll but not both.
- **Cancelled (Red)**: Shows visits that have been cancelled.

Column Headings

O	Visit related icons:  = Overnight Visit  = MVV Device check-in  = No Show Exception
Date	Visit Date
Coord	Coordinator code (used for grouping clients)
Client	Client name (Last name, First name)
Service	Service code
Staff	Employee name (Last name, First name)
Sch Start	Schedule Start time
Sch End	Schedule End time
Sch Hrs	Total Schedule Hours
Call Start	Call-In time
Call End	Call-Out time

Act Hrs	Actual worked hours
Pay Hrs	Pay Hours rounded based on VNS rules
OTABS Hrs	OT/ABS visit hours - when authorized and worked hours do not match
OTABS Reason	OT/ABS reason code (auto populated when reason code is entered)
Auth	Authorized hours
Tasks	Visits tasks
P->A	Check the box to copy scheduled hours to pay Hours
Ovrd	Check the box to accept the calculated worked hours
Reason Code	List of visit change reasons
Memo	Opens schedule details window to enter comments
Exceptions	Lists exception reason(s) for the visit

Click column headers to sort by the selected column.

Total Shown: 48

O	Date	Coord	Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End	Act Hrs	Bill Hrs	Pay Hrs	Auth	Tasks	P->A	Ovrd
	05/04/16-We	124	CARTER, RICHARD	S5125	Caulfield, Jovita	RN	13:00	14:30		1.50	13:00	14:30	1.50	1.50	1.50	N		<input type="checkbox"/>	<input type="checkbox"/>
	05/04/16-We	111	GATSON, JANET	S5130	Lichtenberger, Bry	HMK	14:00	15:00		1.00	14:01	15:00	0.98	1.00	1.00	N		<input type="checkbox"/>	<input type="checkbox"/>
	05/04/16-We	111	JOHNSON, DAISY	S5125C	Mcelligott, Benedic	CNA	14:00	15:00		1.00	14:00	15:00	1.00	1.00	1.00	N	3	<input type="checkbox"/>	<input type="checkbox"/>
	05/04/16-We	124	KLEIN, MARIA	S5125C	Harring, Willow	RN	14:00	15:00		1.00	14:00			-	-	N		<input type="checkbox"/>	<input type="checkbox"/>
	05/04/16-We	124	CARTER, RICHARD	S5125	Royer, Trang	CNA	15:00	16:30		1.50	14:45	16:30	1.75	1.75	1.75	N		<input type="checkbox"/>	<input type="checkbox"/>
	05/04/16-We	124	LONDON, CHRISTOP	S5130	Vessels, Brigida	CNA	15:00	16:00		1.00				-	-	N		<input type="checkbox"/>	<input type="checkbox"/>
	05/04/16-We	124	LEATER, ALAN	S5125	Clarkson, Deena	CNA	15:30	16:30		1.00	15:30			-	-	N		<input type="checkbox"/>	<input type="checkbox"/>
	05/04/16-We	124	KLEIN, MARIA	S5125C	Rudman, Dominiqu	LPN	16:00	17:00		1.00		17:04		-	-	N		<input type="checkbox"/>	<input type="checkbox"/>
	05/04/16-We	111	JOHNSON, DAISY	S5125C	Snow, Suzanna	CNA	16:00	17:00		1.00	15:58	17:00	1.03	1.00	1.00	N	2	<input type="checkbox"/>	<input type="checkbox"/>
	05/04/16-We	111	GATSON, JANET	S5130	Beehler, Jenice A.	HMK	16:00	17:00		1.00	16:00	17:00	1.00	1.00	1.00	N		<input type="checkbox"/>	<input type="checkbox"/>

Use the page controls at the bottom of the screen to set the number of lines per page or jump to a specific page.

- System defaults to display all visits except Unknown Clients.
- Exceptions appear in red and description is displayed in Exception column.
- Unscheduled Visits show dashes (--) in the Schedule Start and End columns.
- Mouse over the client or employee name for pop-up to see Santrax ID and contact numbers.
- Manual adjustments/edits appear bolded.

Reviewing Activity

- ◆ Sorting by Client helps locate calls with Staff ID errors.
 - Schedules and calls for client should be adjacent.
- ◆ Sorting by Staff helps locate calls from unregistered phones.
 - Schedules for staff and calls from staff should be adjacent.

Total Shown: 34												
O	Date	Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End	Act Hrs
	02/12/2013 - Tue	Baldeo, Jerome	S5130	Amarilla, Rosario	HHA	14:00	15:00		1.00	13:58	14:58	1.0
	02/12/2013 - Tue	Baldewko, John		0000005190					0.00	11:28		
	02/12/2013 - Tue	Baldewko, John	T1019	Amodio, Frankie	HHA	10:30	11:30		1.00	10:27		
	02/12/2013 - Tue	Baldewko, John	S5125	Amodio, Frankie	HHA	13:15	14:15		1.00	13:14	14:20	1.1

MVV visits will have a “phone” icon.

Total Shown: 5 As Of: 10:00 PM

O	Date	Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End	Act Hrs	Bill Hrs	Pay Hrs	Supplies	Tasks	P->A	Ovrd	Memo	Exceptions	IsFVV Enabled
	10/10/2014 - Fri	Turtle, Leo		Heyer, Gregory	HHA				0.00	13:55	17:54	3.98	3.98	3.98	0	4	<input type="checkbox"/>	<input type="checkbox"/>		Unscheduled Event	
	10/10/2014 - Fri	Bombadil, Tom	AD	Heyer, Gregory	HHA	12:00	13:00		1.00						0		<input type="checkbox"/>	<input type="checkbox"/>		No Show Exception	
	10/10/2014 - Fri	Bartlett, Jed	AD	Heyer, Gregory	HHA	14:00	15:00		1.00	13:59	14:55	0.93	0.93	0.93	0	4	<input type="checkbox"/>	<input type="checkbox"/>			
	10/10/2014 - Fri	Bullfrog, Jeremiah	AD	Heyer, Gregory	HHA	16:00	17:00		1.00	16:00	16:41	0.68	0.68	0.68	0	4	<input type="checkbox"/>	<input type="checkbox"/>			
	10/10/2014 - Fri	Denver, Jane	AD	Augusthy, Jovise	HHA	20:00	09:00	M	13.00						0		<input type="checkbox"/>	<input type="checkbox"/>			

Go To: [Home](#) [Santrax Maintenance](#) Version 6.8.7


Telephony visits will not.

Total Shown: 415 As Of: 03:32 PM

O	Date	Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End	Act Hrs	Bill Hrs	Pay Hrs	Supplies	Tasks	Ovrd	Memo	Exceptions	IsFVV Enabled
	11/24/2011 - Thu	J, MAC	T1031	L, MAYTE	LPN	08:57	09:21		0.40	08:57	09:21	0.40	0.50	0.50	0	1	<input type="checkbox"/>			
	11/24/2011 - Thu	M, GREG	T1021	I, YAMISEL	HHA	09:30	10:30		1.00				1.00	1.00	0		<input type="checkbox"/>			
	11/24/2011 - Thu	G, VILM	T1021	M, KARLA	HHA	09:30	10:30		1.00	09:36	10:30	0.90	1.00	1.00	0		<input type="checkbox"/>			
	11/24/2011 - Thu	J, MAC	T1031	L, MAYTE	LPN	16:00	16:30		0.50	15:11			1.25	1.25	0	1	<input type="checkbox"/>			
	11/24/2011 - Thu	F, MARTA	T1021	L, ADELINA	HHA	17:00	18:00		1.00	17:09	18:03	0.90	1.00	1.00	0		<input type="checkbox"/>			
	11/24/2011 - Thu	G, VIL	T1021	M, KARLA	HHA	17:00	18:00		1.00	16:17	16:57	0.67	0.75	0.75	0		<input type="checkbox"/>			
	11/23/2011 - Wed	J, MAC	T1031	L, MAYTE	LPN	09:00	09:30		0.50	08:42	09:07	0.42	0.50	0.50	0	1	<input type="checkbox"/>			
	11/23/2011 - Wed	M, GREG	T1021	I, YAMISEL	HHA	09:30	10:30		1.00				1.00	1.00	0		<input type="checkbox"/>			

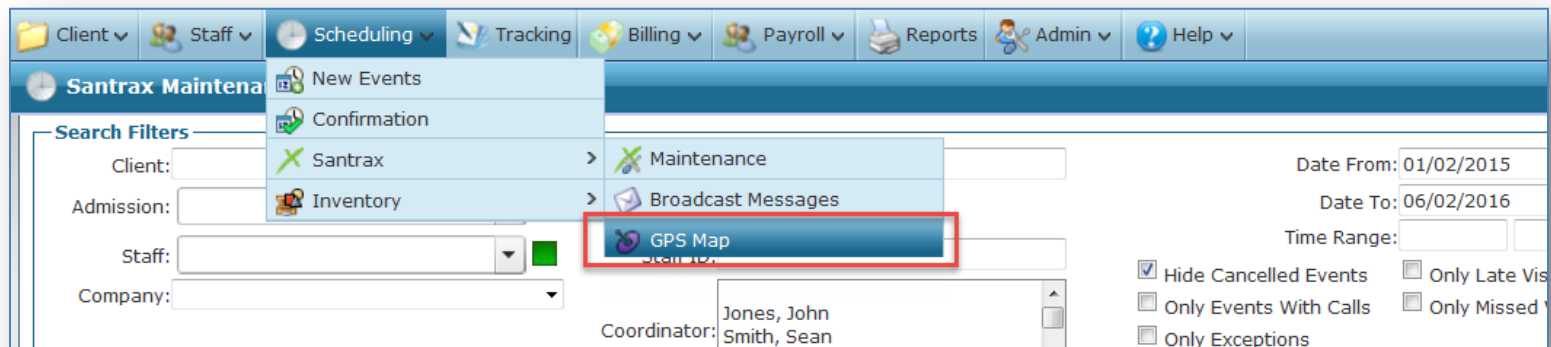
Visit Exceptions are highlighted in **Red**, indicating data is missing or invalid. Examples:

- ◆ **GPS Distance** – Caregiver did not check-in or check-out within the allowable distance from the client/member phone as scheduled or failed to check-in via the device.

O	Date	Coord	Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End	Act Hrs	Bill Hrs	Pay Hrs
	11/20/15-Fr	000	Buck, Joe	S5125	Smith, Sean	HHA	16:30	18:00		1.50	15:59	16:12	0.22	0.25	0.25

Exception Types – GPS Distance

To view the details of the GPS Distance Exception, go to the GPS Map.



Use the Map Filters to locate the exception details

GPS Map

GPS / GPS Map

GPS Map Filters

Visit Filters

Status
Select

Visit
Select

Employee Filters

First Name

Last Name

Phone Number

Client Filters

First Name

Last Name

Phone Number

Branch
Select

Supervisor
Select

Clear

Q Filter

GPS Map

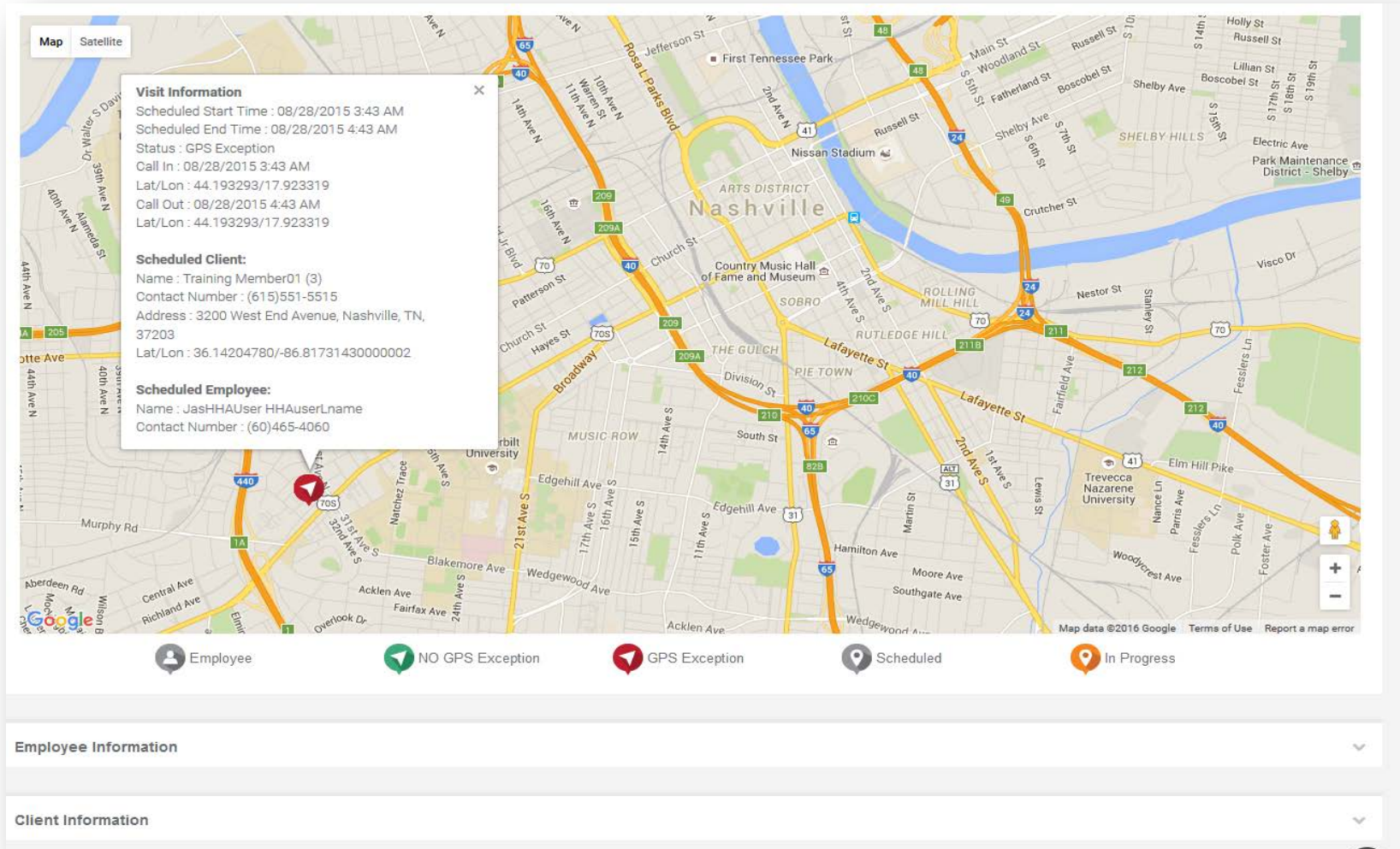
Cursor Location
36.1847, -86.8663

Distance (ctrl-click)

Date
08/28/2015

Exception Types – GPS Distance

The Map will show the exception details



Visit Information

- Scheduled Start Time : 08/28/2015 3:43 AM
- Scheduled End Time : 08/28/2015 4:43 AM
- Status : GPS Exception
- Call In : 08/28/2015 3:43 AM
- Lat/Lon : 44.193293/17.923319
- Call Out : 08/28/2015 4:43 AM
- Lat/Lon : 44.193293/17.923319

Scheduled Client:

- Name : Training Member01 (3)
- Contact Number : (615)551-5515
- Address : 3200 West End Avenue, Nashville, TN, 37203
- Lat/Lon : 36.14204780/-86.81731430000002

Scheduled Employee:

- Name : JasHHAUser HHAuserLName
- Contact Number : (60)465-4060

Legend:

- Employee
- NO GPS Exception
- GPS Exception
- Scheduled
- In Progress

Employee Information

Client Information

Exception Types – No Show

- ◆ **No show** – Caregiver failed to call or did not call in from the registered client/member phone as scheduled or failed to check-in via the device.

Date	Coord	Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End	Act Hrs	Bill Hrs	Pay Hrs	A
05/23/16-Mo	124	BELL, BEATRICE	T1019	Foley, Regina	CNA	09:00	13:00		4.00				-	-	

How to resolve:

- Contact the caregiver, if they failed to call in or check in, instruct them to do so immediately.
- If the caregiver cannot be reached, contact the client's home to check status. If the caregiver is there, instruct them to call immediately. If not, advise the client a back-up plan being implemented.

Exception Types – No Show

If the scheduled caregiver is unable to make the visit and you have arranged for a replacement caregiver, the schedule needs to be updated:

1. Review the client authorization to determine the client's preferred schedule time.
2. Double click on the schedule on the Maintenance screen to open the Scheduled Detail screen to set the replacement and adjust the time if needed.
3. Select the appropriate reason code for the change.

Exception Types – No Show

If the visit will not be made up on the same day, the No Show will become a Missed visit.

1. Go to the Late/Missed Visit Handling tab in the Schedule Detail screen
2. Select the appropriate Late reason and resolution. Use the Comment field in the Schedule Detail screen to further document the reason for the Missed visit.

Exception Types – Unknown Client

- ◆ **Unknown Client** – Caregiver calls from a phone number that is not assigned to any client/member.

Date	Coord	Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End	Act Hrs	Bill Hrs	Pay Hrs
05/05/16-Th		(516) 484-4400		Lichtenberger, Bry	HMK	--	--		0.00	21:27				-

How to resolve:

Check to see if the unknown call can be merged with a scheduled visit for the staff.

1. Filter or sort the visits by staff order to better identify if there is a schedule the unknown call can be merged to.
2. If the call can be merged, click to highlight the schedule then right-click on the highlighted schedule and choose the merge calls option.
3. Once the call has been merged, review the visit to see if the calculated worked hours matches the schedule. If not, manually adjust the Bill and Pay hours.

Exception Types – Unknown Employee

- ◆ **Unknown Employee** – Santrax ID entered does not match to any employee

Date	Coord	Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End	Act Hrs	Bill Hrs	Pay Hrs
05/04/16-We	124	KLEIN, MARIA		00123471#		--	--		0.00	17:02			-	

How to resolve:


Check to see if the unknown call can be merged with a scheduled visit for the client.

1. Filter or sort the visits by client order to better identify if there is a schedule the unknown call can be merged to.
2. If the call can be merged, click to highlight the schedule then right-click on the highlighted schedule and choose the merge calls option.
3. Once the call has been merged, review the visit to see if the calculated worked hours matches the schedule. If not, manually adjust the Bill and Pay hours.

Exception Types – Unscheduled Visit

- ◆ **Unscheduled Visit** – Start and End calls received but not matched to a schedule. Dashes appear in Scheduled Start and End cells.

Device visit

O	Date	Coord	Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End	Act Hrs	Bill Hrs	Pay Hrs
	09/03/15-Th	000	Buck, Joe		HHAuserLname, Ja	HHA	--	--		0.00	08:54	09:11	0.28	0.25	0.25

Telephony visit

O	Date	Coord	Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End	Act Hrs	Bill Hrs	Pay Hrs
	05/04/16-We	124	RIOS, EDGAR		Mcavoy, Daniella	LPN	--	--		0.00	16:00			-	-

How to resolve:

- Check to see if the unscheduled call(s) can be merged with a scheduled visit.
- If there are no calls to merge, double-click on the line and create the schedule from the calls.

Reminder: Keep your schedules up to date

Exception Types – Missing Call

- ◆ **Missing call**– Call Start or Call End is highlighted in red.

Date	Coord	Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End	Act Hrs	Bill Hrs	Pay Hrs
05/04/16-We	124	LEATER, ALAN	S5125	Clarkson, Deena	CNA	15:30	16:30		1.00	15:30			-	-

How to resolve:

- **Unknown Client Calls:** Using your staff search filters, select the staff worker listed with the unknown client exception from your drop down list. Click 'Refresh'. All visits for the selected staff worker will appear in the results list. Identify if there is a schedule that the "Unknown Client" exception can be merged with.
- **Unknown Staff Calls:** Using your client search filter, select the client from the drop down list associated with the unknown staff exception. Click 'Refresh'. All visits for the client will appear in the results list. Identify if there are any calls received from the client's home from an "Unknown Employee" that can be merged into this scheduled visit.

Exception Types

- ◆ Pay Hrs different from Scheduled Hrs – Aide worked more or less than scheduled. Scheduled Hrs and Pay Hrs will be highlighted in red.

Date	Coord	Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End	Act Hrs	Bill Hrs	Pay Hrs
05/05/16-Th	124	LEATER, ALAN	S5125	Pera, Kathaleen	CNA	12:00	13:00		1.00	12:02	13:18	1.27	1.25	1.25

How to resolve:

- Did the employee work more than authorized?
 - You cannot bill more than authorized; therefore the bill hrs. will not be adjusted.
 - You do have the ability to change the pay hours. Press Save.
- **Worker did not work the full hours**
 - After proper research, it was determined the worker did not work the full hours and the bill and pay hours need to be adjusted.
 - When clicking on the Override Box on the visit detail line, the system will pay and bill the actual hours.

Merging Calls

Sorting and filtering by Client helps locate calls with Staff ID errors.

Sorting and filtering by Staff helps locate calls from unregistered phones (*uncheck the 'exclude unknown clients' filter*)


Filter for a specific Client or Staff to see the schedule and additional unknown Client or Staff call together.

Date	Coord	Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End	Act Hrs	Bill Hrs	Pay Hrs
05/05/16-Th		(646) 533-8500		Beehler, Jenice A.	HMK	--	--		0.00	16:21			-	-
05/05/16-Th	111	BELL, BEATRICE	S5130	Beehler, Jenice A.	HMK	14:00	15:30		1.50				-	-


1. Click anywhere on a schedule line that needs calls merged to highlight it, then right click
(Schedule must have a service in order to merge calls to it)
2. Click Merge Calls in pop-up
 - ◆ A dialog box with all the potential calls you can merge will open

Date	Coord	Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End	Act Hrs	Bill Hrs	Pay Hrs	Au
05/05/16-Th		(646) 533-8535		Beehler, Jenice A.	HMK	--	--		0.00	16:21				-	-
05/05/16-Th	111	BELL, BEATRICE	S5130	Beehler, Jenice A.	HMK	14:00	15:30		1.50						
05/05/16-Th	111	GATSON, JAY	S5130	Beehler, Jenice A.	HMK	16:00	17:00		1.00	16:15	17:00				

1



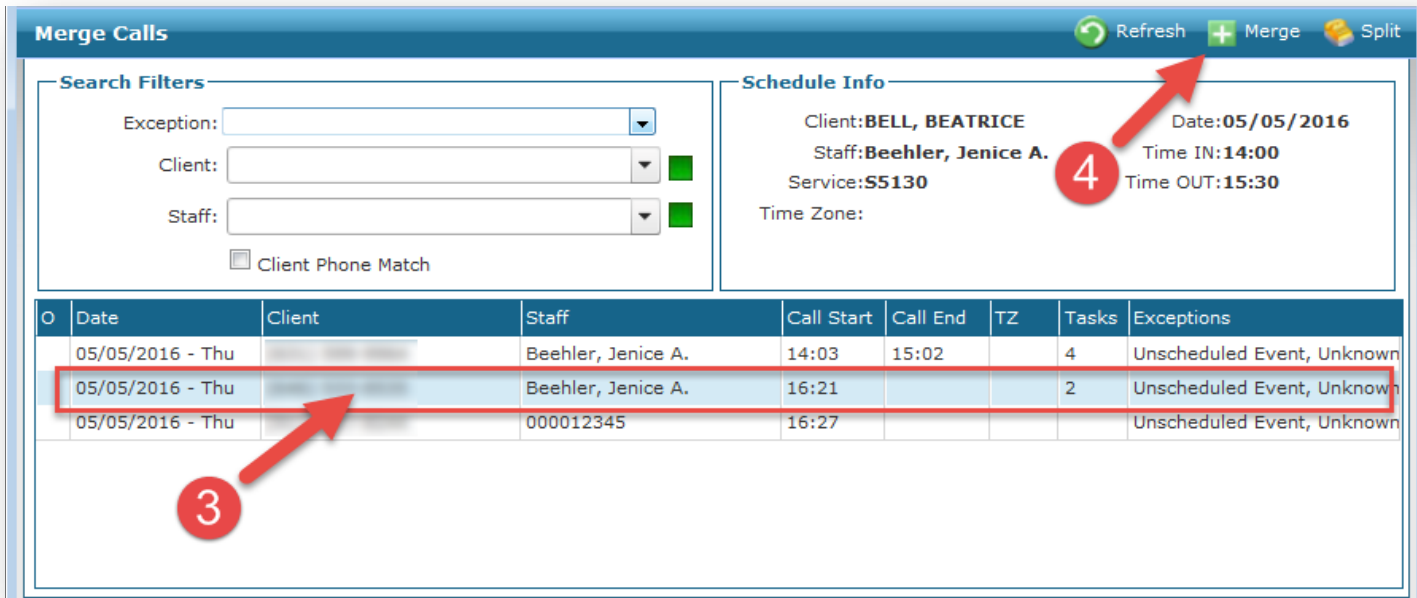
2



3. Select the appropriate call

- ◆ Calls within 2 hours of the start or end of the schedule
- ◆ Same or unknown staff and client

4. Click the Merge button



The screenshot shows the 'Merge Calls' window. At the top right, there are buttons for 'Refresh', 'Merge' (highlighted with a red circle and arrow labeled '4'), and 'Split'. On the left, the 'Search Filters' section includes dropdowns for 'Exception:', 'Client:', and 'Staff:', along with a 'Client Phone Match' checkbox. On the right, the 'Schedule Info' section displays: Client: BELL, BEATRICE, Staff: Beehler, Jenice A., Service: S5130, Date: 05/05/2016, Time IN: 14:00, and Time OUT: 15:30. Below these is a table with columns: O, Date, Client, Staff, Call Start, Call End, TZ, Tasks, and Exceptions. The table contains three rows. The second row is highlighted with a red box and a red circle with the number '3' and an arrow pointing to it. The third row has a staff ID of 000012345.

O	Date	Client	Staff	Call Start	Call End	TZ	Tasks	Exceptions
	05/05/2016 - Thu		Beehler, Jenice A.	14:03	15:02		4	Unscheduled Event, Unknown
	05/05/2016 - Thu		Beehler, Jenice A.	16:21			2	Unscheduled Event, Unknown
	05/05/2016 - Thu		000012345	16:27				Unscheduled Event, Unknown

Correcting Visit Exceptions

Winsberg, Helen	HHA	06:00	07:00	1.00				-	-	0		<input type="checkbox"/>	No Show Exception
Antignano, Xiu Li	HHA	08:00	09:00	1.00	08:00			-	-	0		<input type="checkbox"/>	No Out Call
Amodio, Frankie	HHA	10:30	11:30	1.00	10:27			-	-	0		<input type="checkbox"/>	No Out Call
Antignano, Xiu Li	HHA	13:00	14:00	1.00		14:00		-	-	0	2	<input type="checkbox"/>	No In Call
Albert, Dimitry	HHA	13:15	14:15	1.00		14:21		-	-	0	2	<input type="checkbox"/>	No In Call
Aloni, Tina	HHA	13:45	14:45	1.00		14:45		-	-	0	2	<input type="checkbox"/>	No In Call
Amodio, Frankie	HHA	14:15	15:15	1.00	14:20	15:10	0.83	0.75	0.75	0	2	<input type="checkbox"/>	Payroll Hours Less Than Scheduled H

Winsberg, Helen	HHA	06:00	07:00	1.00				1.00	1.00	0		<input checked="" type="checkbox"/>	No Show Exception
Antignano, Xiu Li	HHA	08:00	09:00	1.00	08:00			1.00	1.00	0		<input checked="" type="checkbox"/>	No Out Call
Amodio, Frankie	HHA	10:30	11:30	1.00	10:27			1.00	1.00	0		<input checked="" type="checkbox"/>	No Out Call
Antignano, Xiu Li	HHA	13:00	14:00	1.00		14:00		1.00	1.00	0	2	<input checked="" type="checkbox"/>	No In Call
Albert, Dimitry	HHA	13:15	14:15	1.00		14:21		1.00	1.00	0	2	<input checked="" type="checkbox"/>	No In Call
Aloni, Tina	HHA	13:45	14:45	1.00		14:45		1.00	1.00	0	2	<input checked="" type="checkbox"/>	No In Call
Amodio, Frankie	HHA	14:15	15:15	1.00	14:20	15:10	0.83	0.75	0.75	0	2	<input checked="" type="checkbox"/>	Payroll Hours Less Than Scheduled H

02/12/2013 - Tue	Meadow, Jim	S5125	Winsberg, Helen	HHA	06:00	07:00	1.00					1.00	1.00	0		<input type="checkbox"/>
02/12/2013 - Tue	Baquie, Felecia	S5125	Antignano, Xiu Li	HHA	08:00	09:00	1.00	08:00				1.00	1.00	0		<input type="checkbox"/>
02/12/2013 - Tue	Baldewko, John	T1019	Amodio, Frankie	HHA	10:30	11:30	1.00	10:27				1.00	1.00	0		<input type="checkbox"/>
02/12/2013 - Tue	Athar, Lila	S5125	Aloni, Tina	HHA	12:45	13:45	1.00	12:45				1.00	1.00	0		<input type="checkbox"/>
02/12/2013 - Tue	Baquie, Felecia	S5130	Antignano, Xiu Li	HHA	13:00	14:00	1.00		14:00			1.00	1.00	0	2	<input type="checkbox"/>
02/12/2013 - Tue	Asantewaa, Joann	S5130	Albert, Dimitry	HHA	13:15	14:15	1.00		14:21			1.00	1.00	0	2	<input type="checkbox"/>
02/12/2013 - Tue	Athar, Lila	S5130	Aloni, Tina	HHA	13:45	14:45	1.00		14:45			1.00	1.00	0	2	<input type="checkbox"/>
02/12/2013 - Tue	Bartley, Deborah	S5130	Apollon, Corrine	HHA	14:00	15:00	1.00	14:00				1.00	1.00	0		<input type="checkbox"/>
02/12/2013 - Tue	Baldewko, John	S5130	Amodio, Frankie	HHA	14:15	15:15	1.00	14:20	15:10	0.83	0.75	0.75	0	2		<input type="checkbox"/>

Correcting Visit Exceptions

When the Bill or Pay hours need to be adjusted, double-click in the appropriate column and type in the correct number

Bill hours cannot be greater than scheduled hours.

Decimal points are not required for whole hours.

Save to confirm changes.

Date	Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End	Act Hrs	Bill Hrs	Pay Hrs	Supplies	Tasks	Ovrd	M
04/02/2012 - Mon	Alterations, Evelyn	T1019	Abercrombie, Ros	HHA	10:00	14:00		4.00	10:31	14:01	3.50	4		0	1	<input checked="" type="checkbox"/>	
04/02/2012 - Mon	Alterations, Evelyn	S5130	Abercrombie, Ros	HHA	15:00	16:00		1.00	14:59	15:57	0.97	1.00	1.00	0	4	<input type="checkbox"/>	

Late/Missed Visits

- ◆ T1019 goes late 15 minutes after and missed 60 minutes after if the authorization is for a specific start time.
- ◆ Additional services go late 60 minutes after and missed at midnight on day of service if has a windowed authorization. If the authorization allows for service to begin anytime, it is both late and missed at midnight
- ◆ Agencies are alerted regarding Late and Missed visits and should reach out to an attendant to determine cause.

Remember: For all Late/Missed visits, always check to see if there are calls that can be merged

To correct Late/Missed calls:

- ◆ Open the Schedule Details
- ◆ Click the Late/Missed Handling tab.
- ◆ Select a Reason the visit was missed from the drop down menu.
- ◆ Save.



REQUESTING MANUAL CONFIRMATION

After completing exception handling...

1. Open the visit's **Schedule Detail** screen
 - Confirm the visit's details are correct before submitting it for approval. (Times (proposed, Santrax and Adjusted), Event Code(s), Staff, Bill As)
 - The **MCO Approval** section of the **Schedule Detail** screen will only be available on those visits with all of the following:
 - *A Status of Missed or Hold*
 - *A valid Service*
 - *A valid Event Code*
 - *An assigned staff member*
 - *An assigned client*
2. Select the **Reason** at the new **MCO Approval** section.
3. Click **Save** (*This will flag the visit for MCO approval and place it in a **Payor Status of Pending.***)

How to Request Manual Confirmation

Schedule Detail Delete

General Documents:0 Supplies Call Log:0 Tasks:0 Late/Missed Visit Handling

General

Date: 08/19/2013 - Mon

Service: S5125- Attendant Care

Company: Clarksville

Location: Clarksville

Pos:

Shift Group: Clarksville

PoS Direction: ☐ To ☐ From ☒ N/A

Event Code(s) P/T: T

DEF- Default

Comments

Status

Status: 11- Missed

Times

Proposed: 09:00 13:30 = 4.5 hrs P/T: T

Santrax: 4.5 hrs

Adjusted: 09:00 13:30 = 4.5 hrs

Associated Totals

Miles: 0.00 TT Bill: 0

Supplies: \$0.00 TT Pay: 0

MCO Approval

Reason: Auth / Schedule Not in Place at Time of Visit

Status: Pending

Clients

SMITH, JANE - C1234567-CE

SMITH, JANE C1234567-Ce

Bill As: 05- Unit ☐ Override

Event	Type	Quantity	Rate	Bill Amt	Copay	Status
DEF	05 - Unit	18.00	\$4.37	\$78.66		10 - Cancelled

Staff

Member, Staff. 000012345. .HHA

Member, Staff. 000012345. .HHA

P/T: T Pay As: 01- Hourly ☐ Override

Event	Type	Quantity	Rate	Pay Amt	Status
DEF	01 - Hourly	4.50	\$12.00	\$54.00	10 - Cancelled

Save **Close**

MCO Approval Request Reason Codes

MCO Approval Request Reason Codes
Alternate Staff Provided Service
Auth / Schedule Not in Place at Time of Visit
Member Does Not Have Phone
Member Would Not Allow Staff to Use Phone
Phone Number Not on Member Record
Phone Service Not Available
Staff Arrived Late
Staff Did Not Call In / Out



RESOLVING MANUAL CONFIRMATION REQUESTS

A **Payor Approval** Search filter and an **MCOStatus** column is present on the **Santrax Maintenance** screen so visits can be filtered by and sorted according to their **MCO Approval Status**.

Santrax Maintenance Clear Filter FVV Refresh Update Print Close

Search Filters

Client: SMITH, JANE C1234567-CE ▼ ■ Date From: 07/02/2013 ■
 Staff: ▼ ■ Date To: 08/22/2013 ■
 Company: ▼ Coordinator: ▼ Time Range: ▼
 Location: ▼ Position: ▼
 Admit Type: ▼ Service: ▼
 Team: ▼ Event: ▼
 Region: ▼ Status: ▼
 Exception: ▼ MRN #: ▼
 Payor #: ▼
 Payor Approval: ▼ ←

Status Legend
 Pending
 Confirmed
 Closed
 Hold
 In Process
 Cancelled

Total Shown: 51 As Of: 12:28 PM

O	Date	Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End	Act Hrs	Bill Hrs	Pay Hrs	Supplies	Tasks	Ovrd	Memo	Exceptions	IsFVV Enabled	MCOStatus
	07/22/2013 - Mon	SMITH, JANE	SS100	Bell, Lia	ADC	08:30	16:30		8.00				8.00	8.00	0						
	07/22/2013 - Mon	SMITH, JANE	SS125	Barnes, Kris	HHA	09:00	13:30		4.50				4.50	4.50	0						Approved
6	07/23/2013 - Tue	SMITH, JANE	SS125	Member, Staff	HHA	08:00	14:00		6.00				-	-	0			No Show Exception		Pending	
	07/23/2013 - Tue	SMITH, JANE	SS100	Bell, Lia	ADC	08:30	16:30		8.00				8.00	8.00	0						
	07/24/2013 - Wed	SMITH, JANE	SS100	Bell, Lia	ADC	08:30	16:30		8.00				8.00	8.00	0						
6	07/25/2013 - Thu	SMITH, JANE	SS125	Member, Staff	HHA	08:00	14:00		6.00				-	-	0			No Show Exception		Need More	
	07/25/2013 - Thu	SMITH, JANE	SS100	Bell, Lia	ADC	08:30	16:30		8.00				8.00	8.00	0						
	07/26/2013 - Fri	SMITH, JANE	SS125	Member, Staff	HHA	08:00	14:00		6.00				6.00	6.00	0					Approved	
	07/26/2013 - Fri	SMITH, JANE	SS100	Bell, Lia	ADC	08:30	16:30		8.00				8.00	8.00	0						
6	07/26/2013 - Fri	SMITH, JANE	SS125	Barnes, Kris	HHA	09:00	13:30		4.50				-	-	0			No Show Exception		Rejected	

MCO Approval Statuses

MCO Approval Statuses	Description
Pending	The visit has been flagged for MCO review.
Approved	The visit has been approved by the MCO and the visit is confirmed.
Needs More Info	The provider must contact the MCO and provide additional information.
Rejected	The visit has been rejected by the MCO.



Any manually confirmed visit that is approved by the MCO will be automatically confirmed by the application and be available for invoicing.

O	Date	Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End	Act Hrs	Bill Hrs	Pay Hrs	Supplies	Tasks	Ovrd	Memo	Exceptions	IsFVV Enabled	MCOStatus
	07/22/2013 - Mon	SMITH, JANE	SS125	Barnes, Kris	HHA	09:00	13:30		4.50				4.50	4.50	0		<input type="checkbox"/>				Approved
	07/26/2013 - Fri	SMITH, JANE	SS125	Member, Staff	HHA	08:00	14:00		6.00				6.00	6.00	0		<input type="checkbox"/>				Approved

Requires More Info



If the MCO requests more information, the provider will need to contact the MCO to discuss why the visit needs manual confirmation.

Contact the MCO according to their policy for follow up.

O	Date	Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End	Act Hrs	Bill Hrs	Pay Hrs	Supplies	Tasks	Ovrd	Memo	Exceptions	IsFVV Enabled	MCOStatus
	07/25/2013 - Thu	SMITH, JANE	S5125	Member, Staff	HHA	08:00	14:00		6.00				-	-	0		<input type="checkbox"/>		No Show Exception		Need More
	08/19/2013 - Mon	SMITH, JANE	S5125	Member, Staff	HHA	09:00	13:30		4.50				-	-	0		<input type="checkbox"/>		No Show Exception		Need More

Rejected

If a request is rejected, the visit will remain in the appropriate status based on existing late and missed visit rules with an **MCOS**tatus of **Rejected**.

O	Date	Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End	Act Hrs	Bill Hrs	Pay Hrs	Supplies	Tasks	Ovrd	Memo	Exceptions	IsFVV Enabled	MCOS	Status
	07/23/2013 - Tue	SMITH, JANE	S5125	Member, Staff	HHA	08:00	14:00		6.00				-	-	0		<input type="checkbox"/>		No Show Exception			Rejected
	07/26/2013 - Fri	SMITH, JANE	S5125	Barnes, Kris	HHA	09:00	13:30		4.50				-	-	0		<input type="checkbox"/>		No Show Exception			Rejected

If you change the status of a '**Confirmed**' visit, it will need to go back to the MCO for manual confirmation.

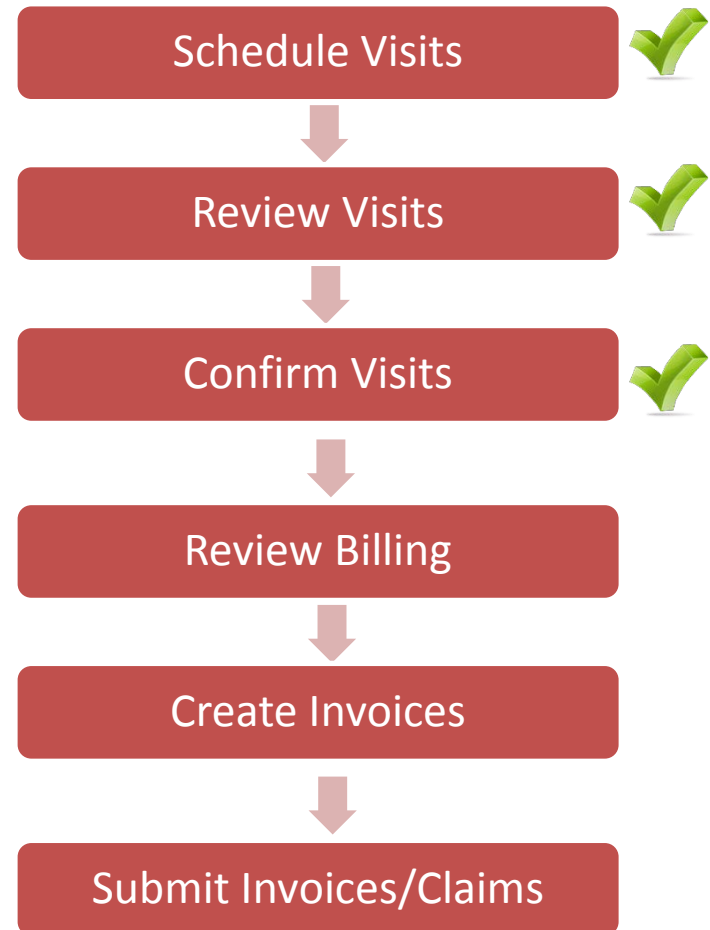
The status of a '**Confirmed**' visit should only be changed when a visit is being rolled back and resubmitted, such as in the case of needing to increase units.



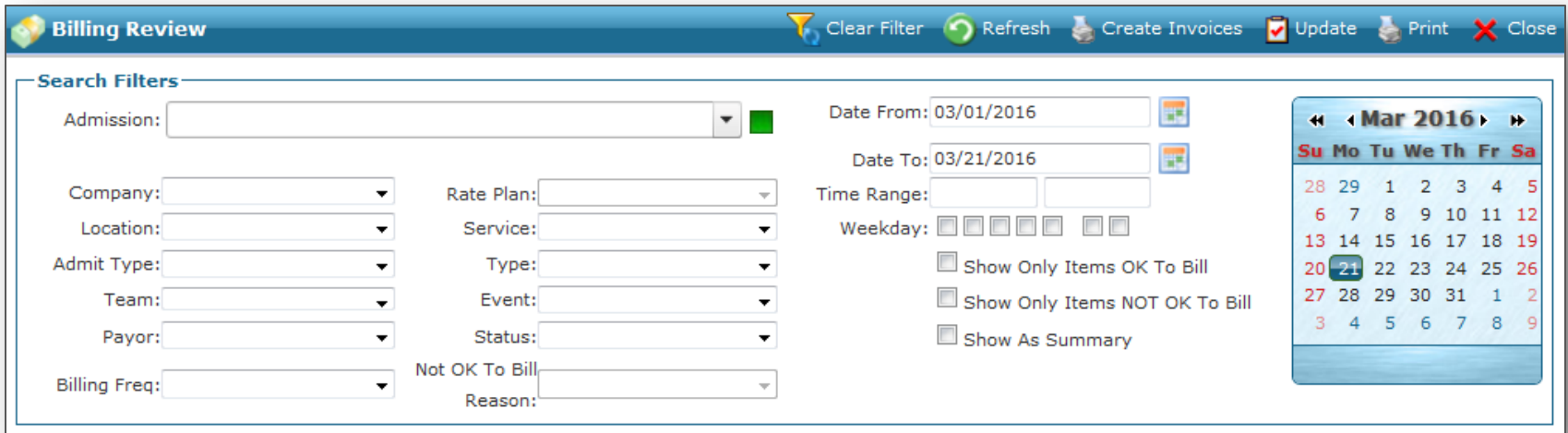
BILLING PROCEDURES

Billing Procedures

1. Review visits for billing.
2. Create invoices.
3. Optionally print or save invoices.
4. Export invoices.



- Click **Billing** from the menu bar.
- The Billing Review screen displays all visits that have been confirmed billable events for the selected date range.
- Filters include Payor, Admit Type, Service, Client and Date Range.



The screenshot shows the 'Billing Review' application window. The title bar includes 'Billing Review' and several action buttons: 'Clear Filter', 'Refresh', 'Create Invoices', 'Update', 'Print', and 'Close'. Below the title bar is a 'Search Filters' section with various dropdown menus and text boxes for filtering data. To the right of the filters is a date range selector and a calendar for March 2016.

Search Filters:

- Admission: [Dropdown]
- Company: [Dropdown]
- Location: [Dropdown]
- Admit Type: [Dropdown]
- Team: [Dropdown]
- Payor: [Dropdown]
- Billing Freq: [Dropdown]
- Rate Plan: [Dropdown]
- Service: [Dropdown]
- Type: [Dropdown]
- Event: [Dropdown]
- Status: [Dropdown]
- Not OK To Bill: [Dropdown]
- Reason: [Dropdown]

Date Range:

- Date From: 03/01/2016
- Date To: 03/21/2016
- Time Range: [Text Box]
- Weekday: [Grid of checkboxes]

Calendar (March 2016):

Su	Mo	Tu	We	Th	Fr	Sa
28	29	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

Display Options:

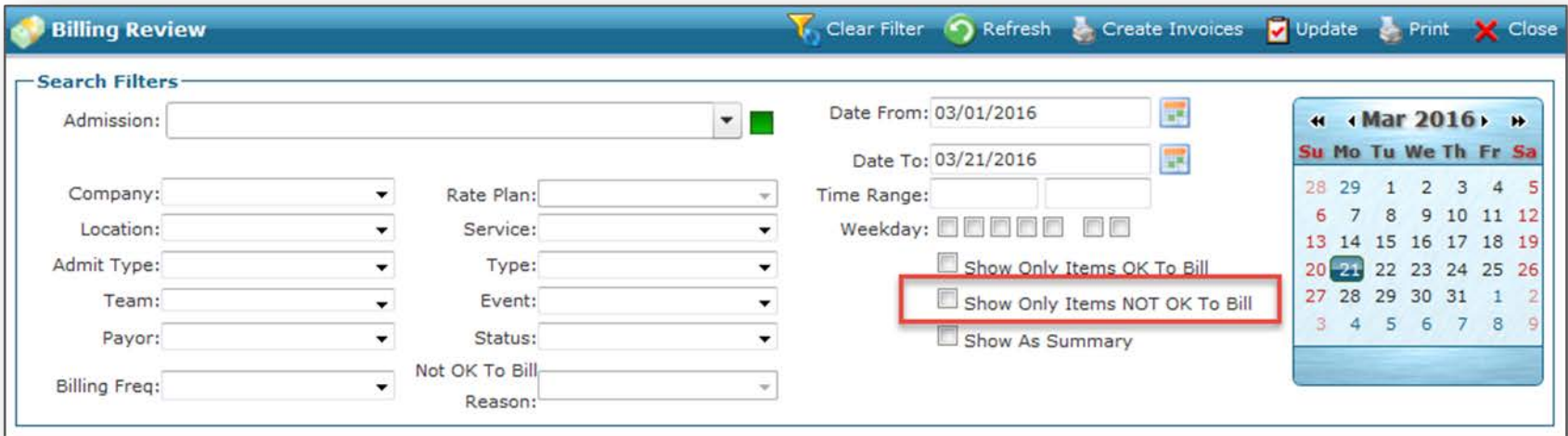
- ☐ Show Only Items OK To Bill
- ☐ Show Only Items NOT OK To Bill
- ☐ Show As Summary

In order to be “OK to bill,” schedules must meet the following criteria:

- ◆ Valid Authorization
- ◆ Schedule matches the authorization
- ◆ Service was provided according to the authorization
- ◆ Check-in/Check-out matches schedule or if there was an exception, the encounter was manually confirmed and documented.

Billing Procedures

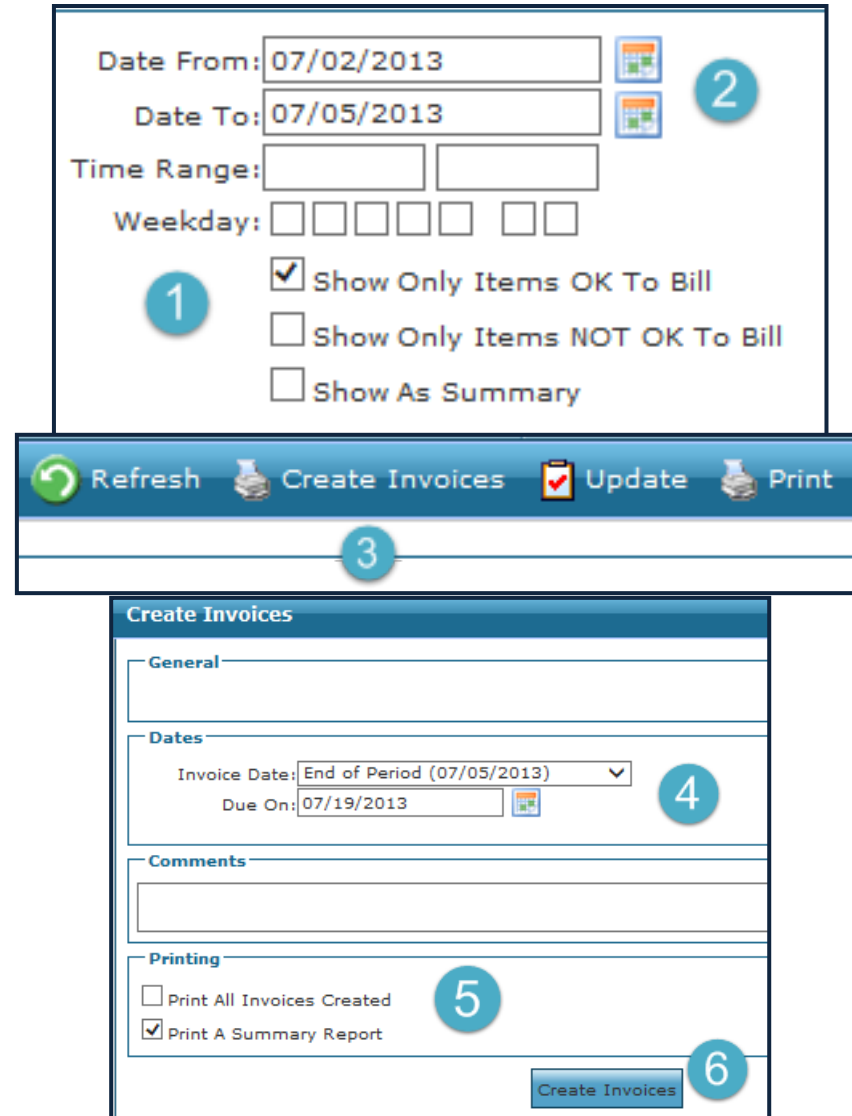
- ◆ Check **Show Only Items NOT OK to Bill**.
- ◆ Displays confirmed visits for which invoices cannot be created.
 - Visits outside authorization parameters.
 - Invoices for a Zero amount will not invoice



The screenshot shows the 'Billing Review' window with a search filter section on the left and a date/calendar section on the right. The search filters include Admission, Company, Location, Admit Type, Team, Payor, Billing Freq, Rate Plan, Service, Type, Event, Status, Not OK To Bill, and Reason. The date section includes Date From (03/01/2016), Date To (03/21/2016), Time Range, Weekday, and three checkboxes: 'Show Only Items OK To Bill', 'Show Only Items NOT OK To Bill' (highlighted with a red box), and 'Show As Summary'. A calendar for March 2016 is also visible on the right.

Billing Procedures

1. Select **Show Only Items OK to Bill**.
2. Select your billing period then click **Refresh**.
3. Click **Update**
4. Click **Create Invoices**.
5. Select age as of date (Invoice Date).
6. Select printing options, if needed.
7. Click **Create Invoices**.



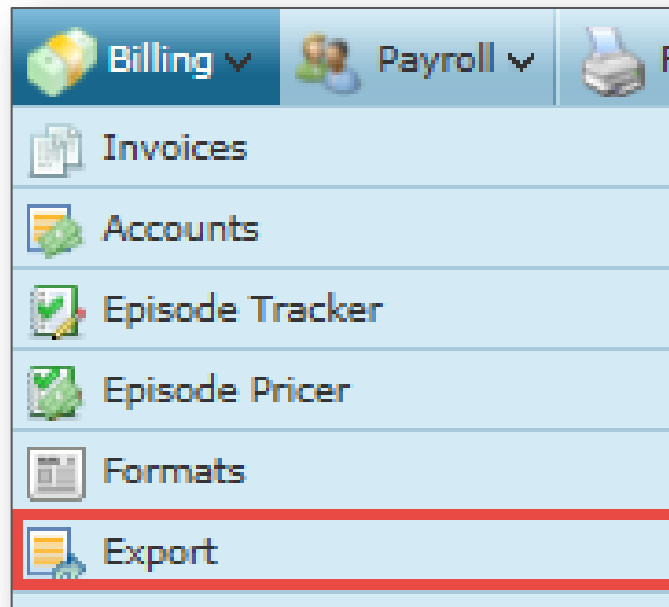
The screenshot displays a web-based billing interface. At the top, there are date selection fields: 'Date From: 07/02/2013' and 'Date To: 07/05/2013', each with a calendar icon. Below these is a 'Time Range' field and a 'Weekday' selection area with checkboxes. A blue circle with the number '1' points to the 'Show Only Items OK To Bill' checkbox, which is checked. Other options include 'Show Only Items NOT OK To Bill' and 'Show As Summary'. A blue circle with the number '2' points to the calendar icon next to the 'Date To' field. Below the selection area is a toolbar with buttons: 'Refresh' (with a circular arrow icon), 'Create Invoices' (with a printer icon), 'Update' (with a checkmark icon), and 'Print' (with a printer icon). A blue circle with the number '3' points to the 'Update' button. Below the toolbar is a 'Create Invoices' form. The form has sections for 'General', 'Dates', 'Comments', and 'Printing'. In the 'Dates' section, 'Invoice Date' is set to 'End of Period (07/05/2013)' and 'Due On' is '07/19/2013'. A blue circle with the number '4' points to the 'Invoice Date' dropdown. In the 'Printing' section, there are checkboxes for 'Print All Invoices Created' and 'Print A Summary Report'. A blue circle with the number '5' points to the 'Print A Summary Report' checkbox. At the bottom right of the form is a 'Create Invoices' button. A blue circle with the number '6' points to this button.



GENERATING & VIEWING EXPORTS

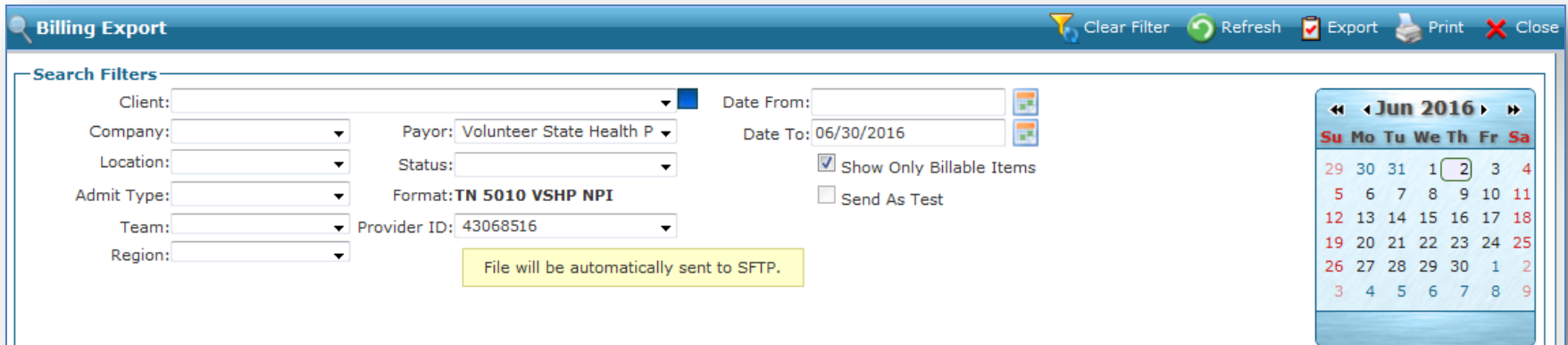
Generating & Viewing Exports

- ◆ The Billing Export screen is where invoices will be exported for electronic claims submission.
- ◆ Hover your mouse over the Billing icon and select Export from the drop-down.



Generating & Viewing Exports

1. Select the date range to be exported (recommendation is to keep the "Date From" field blank to ensure old invoices are also exported).
2. Check the 'Show Only Billable Items' box.
3. Select the Payor and click Refresh as that determines the format.
4. Select the Provider ID
5. Click **Export** button, when ready.



The screenshot shows the 'Billing Export' application window. The title bar includes 'Billing Export' and buttons for 'Clear Filter', 'Refresh', 'Export', 'Print', and 'Close'. The main area is titled 'Search Filters' and contains several input fields and checkboxes:

- Client:** (dropdown menu)
- Company:** (dropdown menu)
- Location:** (dropdown menu)
- Admit Type:** (dropdown menu)
- Team:** (dropdown menu)
- Region:** (dropdown menu)
- Payor:** Volunteer State Health P (dropdown menu)
- Status:** (dropdown menu)
- Format:** TN 5010 VSHP NPI (dropdown menu)
- Provider ID:** 43068516 (dropdown menu)
- Date From:** (empty text field)
- Date To:** 06/30/2016 (text field)
- ☒ Show Only Billable Items
- ☐ Send As Test

A yellow tooltip at the bottom center states: 'File will be automatically sent to SFTP.'

On the right side, there is a calendar for June 2016. The calendar shows the days of the week (Su, Mo, Tu, We, Th, Fr, Sa) and the dates. The date 2 is highlighted in the calendar.

Once claims have been exported, you can review the exports from the Billing History screen.

1. Hover over the Billing icon and click **History**.
2. Click the (+) icon next to the folder to display or hide contents.
3. Click to select an Export.
 - ◆ **Claims** tab shows invoices that are part of the claim.
 - ◆ **Raw File** tab shows the actual formatted text file that was exported.

Generating & Viewing Exports

