



# Rollbacks and Claim Resubmissions

June 24, 2024

**Sandata**

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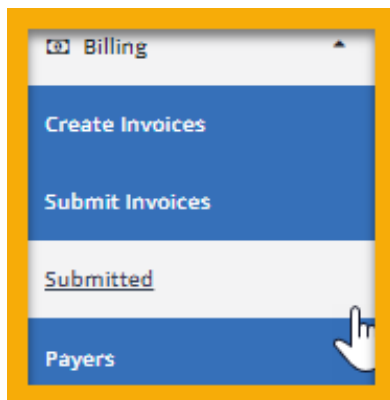
# Rolling Back an Entire Billing File

## Note(s)/Best Practice:



- This should only be completed when the entire or majority of the file has failed/denied
- For claim files where a majority was denied/rejected follow the below steps and then change the status of the individual invoices that were paid back to 06 - Bill Sent
  - Individual invoice steps are listed in the section “Changing an Individual Invoice Status”

1. In Your EVV Instance access the Billing > Submitted tab on the left-hand side of the screen.



2. Locate the file using the search filters provided.
3. Click the file name to open it.

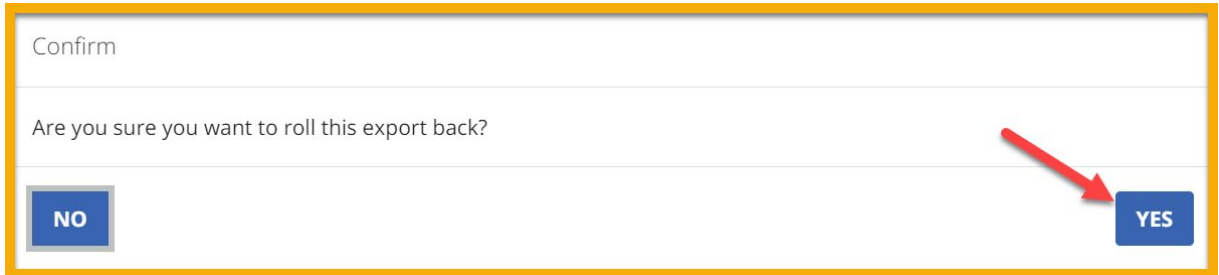
Filename	Date	Payer
<a href="#">NVANT INST20231213170111.TXT</a>	12/13/23	NVANTI
<a href="#">NVANT INST20231213153847.TXT</a>	12/13/23	NVANTI

4. Scroll to the bottom of the file results.

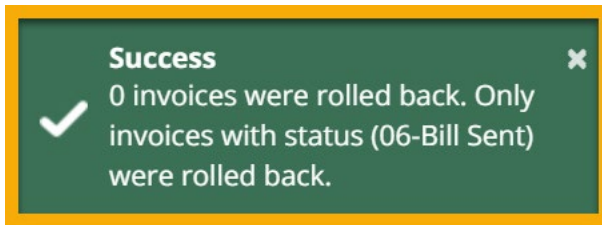
5. Select "Rollback".



6. The system will ask if you wish to confirm this choice.
7. Select "Yes"



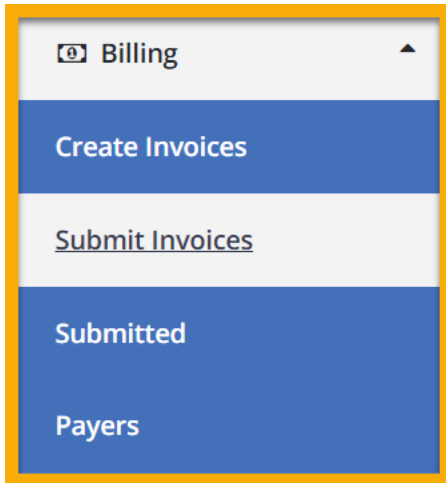
8. You will receive confirmation that the claims were rolled back successfully.



9. This places all invoices from this file back to a Billable status to be resubmitted.

## Changing an Individual Invoice Status

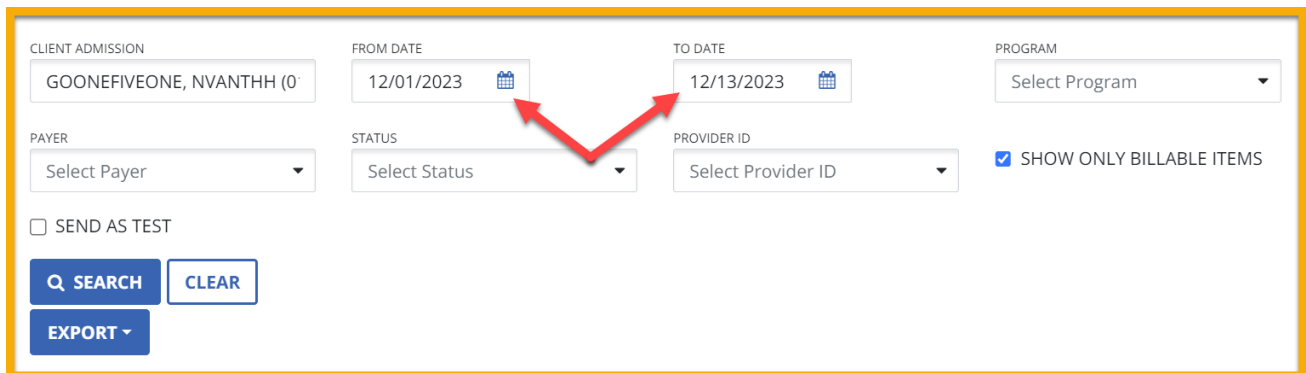
1. Navigate to Billing > Submit Invoices on the left-hand side of the screen.




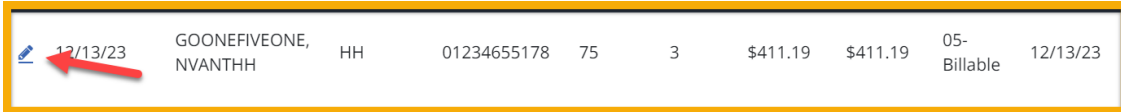
### Note(s)/Best Practice:

- The following process can also be completed by accessing the Invoices Tab within a client's profile.

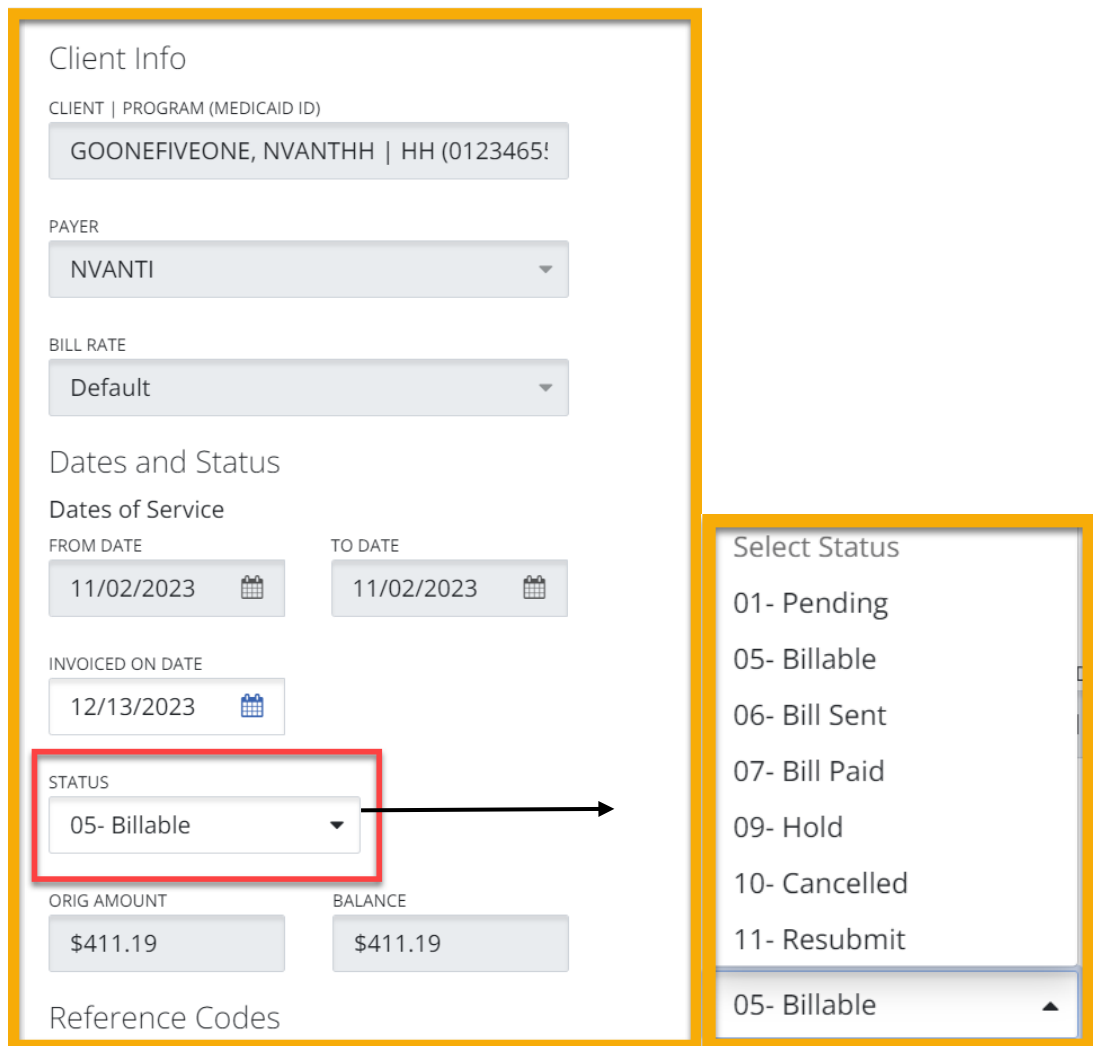
2. Using the Search Filters, search for the desired invoice to rollback/change the status of.
  - a. The date range on this screen refers to the date the invoice was created, NOT the date of service.
3. Make sure to unselect "SHOW ONLY BILLABLE ITEMS" as an invoice that has already been submitted is not currently in a billable status.

A screenshot of a search filters interface for invoices. The interface includes several input fields and buttons. At the top, there are four main sections: "CLIENT ADMISSION" with a text field containing "GOONEFIVEONE, NVANTHH (0)", "FROM DATE" with a date field set to "12/01/2023" and a calendar icon, "TO DATE" with a date field set to "12/13/2023" and a calendar icon, and "PROGRAM" with a dropdown menu set to "Select Program". Below these are "PAYER" (dropdown "Select Payer"), "STATUS" (dropdown "Select Status"), and "PROVIDER ID" (dropdown "Select Provider ID"). There is a checkbox for "SHOW ONLY BILLABLE ITEMS" which is currently checked. At the bottom left, there is a checkbox for "SEND AS TEST". At the bottom, there are three buttons: "SEARCH" (with a magnifying glass icon), "CLEAR", and "EXPORT" (with a dropdown arrow). Two red arrows point from the "STATUS" dropdown to the "FROM DATE" and "TO DATE" date fields.

4. Select the Pencil Edit Icon (  ) on the invoice you wish to change the status of.



5. In the Invoice Details, change the Status of the invoice to the appropriate selection
- 05-Billable:** change to this status when you simply need to resubmit the invoice.
  - 06-Bill Sent:** change to this status when you rolled back a whole file but this invoice in the file was paid and does NOT need to be resubmitted.
  - 10-Cancelled:** change to this status when you need to edit the visit in any way that would alter the monetary value of the visit.



The image shows the 'Client Info' and 'Dates and Status' sections of an invoice details page. The 'Client Info' section includes fields for 'CLIENT | PROGRAM (MEDICAID ID)' (GOONEFIVEONE, NVANTHH | HH (0123465!)), 'PAYER' (NVANTI), and 'BILL RATE' (Default). The 'Dates and Status' section includes 'Dates of Service' (FROM DATE: 11/02/2023, TO DATE: 11/02/2023) and 'INVOICED ON DATE' (12/13/2023). The 'STATUS' dropdown menu is currently set to '05- Billable' and is highlighted with a red box. An arrow points from this dropdown to a 'Select Status' dropdown menu on the right, which lists the following options: 01- Pending, 05- Billable, 06- Bill Sent, 07- Bill Paid, 09- Hold, 10- Cancelled, 11- Resubmit, and 05- Billable (selected).

6. Make any necessary changes and resubmit your claims

## Resubmitting

1. Navigate to the Billing>Submit Invoices screen on the left-hand side.
2. Filter for your desired invoices.
  - a. The date range on this screen refers to the date the invoice was created, NOT the date of service.
3. Ensure “SHOW ONLY BILLABLE ITEMS” is selected.

Select an Invoice

CLIENT ADMISSION: Type 3 letters of the Client's na

FROM DATE: 06/01/2024

TO DATE: 06/30/2024

PROGRAM: Select Program

PAYER: Select Payer

STATUS: Select Status 2

PROVIDER ID: Select Provider ID

SHOW ONLY BILLABLE ITEMS

SEND AS TEST

SEARCH CLEAR

No search performed yet

1 2 3

4. Select the “Payer” field and refresh the screen by selecting “Search”.
  - a. If search is not selected, you will see the following message “Any displayed results reflect a previous search”.

SEND AS TEST

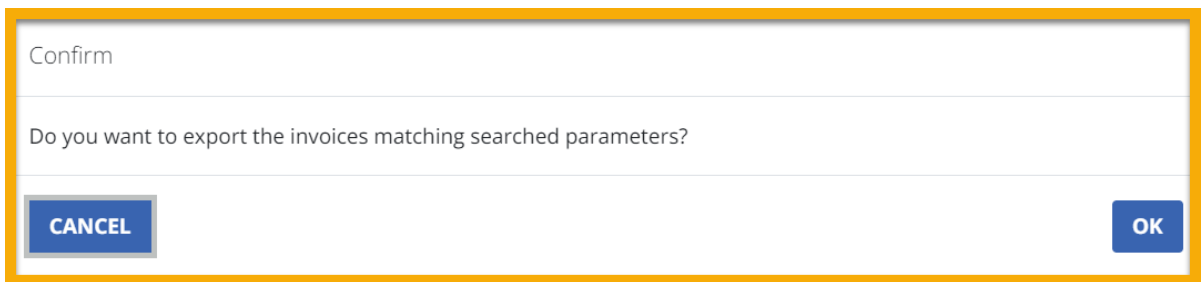
SEARCH CLEAR

Any displayed results reflect a previous search

5. Select "Submit Invoices"



6. A pop up will appear asking you to confirm if you want to export the invoices matching the searched parameters
7. Select "OK"



8. You should see a green Success box display indicating that your invoice data was submitted successfully

