Procedure for QA and approving Attendance Billing

Step 1: Click the Billing tab from the dashboard.

Step 2: Click “Search” within the Attendance module. The screen refreshes to the “Attendance Data Search” page.

Step 3: Enter the Start and End dates for the period in which you wish to search.

Step 4: Within the region labeled “Required” identify the “Service Date”, “Attendance Type Name”, “Service Description (Code)”, “Program (Site)” in this specific order, i.e., top to bottom. Leave “Service Authorization Status” defaulted to “Approved”. For individuals living in an ICF, make sure to select “Day Services ICF” from the options provided. Click the “Search” button. The page refreshes to the “Attendance” page showing the list of individuals and dates matching the search criteria you used.

NOTE: The columns in the attendance table are color coded to indicate the status of each individual’s attendance data. For example, a blank light grey cell with no icons in the table means that attendance data has not been entered. A dark grey cell with icons means that there is missing attendance data, i.e., it is incomplete and requires further attention. A blue cell means that the information has been approved. When the “Approve” button on the bottom right of the screen is clicked, those cells that were blue, now turn green to show full/half day and number of services which may be billed.

Step 5: Look in the blue/green box for a “P” or an “A”, hover over the clock icon to reveal a pop-up box showing time in/time out, look for the fork and knife icon to see if lunch was deducted (if the individual was present for lunch). Compare this attendance data to the paper record. Make any necessary corrections.

NOTE: To make corrections, double-click the “P” or the “A”, the “Attendance Data Update” page will appear and you may make the necessary changes. Upon completion, click the “Update” button.

Notify your supervisor that the attendance data is ready to be approved.

The following steps will be taken by your supervisor who will follow Steps 1 through 4 and then proceed to Step 6:

Step 6: Check the “Select All Attendance” box, then click the “Approve” button in the bottom right corner of the screen. Upon completing these previous steps, all cells will turn green and show whether the individuals were present for a full, half, or L2 day and also the number of billable services that were provided. The screen will refresh and all cells will be shaded green.

NOTE: If a green box has a red border, this means there is a problem with the Hab Plan which MUST be fixed before generating billing data. (Troubleshooting Hints: Make sure that all active and discontinued goals are still attached to the Hab Plan. Make sure data has been documented on ISP Programs.)

NOTE: To make corrections, make sure the “Update” tab on the top part of the screen has been selected, then double-click the “P” or the “A”, the “Attendance Data Update” page will appear and you may make the necessary changes. Upon completion, click the “Update” button.

Step 7: Verify that all boxes are shaded green and that none of them are outlined in red. Click the “Generate Billing Data” tab at the top of the page, check the “Select All Attendance” box, then click the “Generate Billing Data” button on the bottom right corner. A box will appear stating that you have successfully submitted for billing, and you should click the “OK” button. All cells will turn orange.

NOTE: {Once the billing policy has been reviewed} If mistakes are made in the billing data do not generate billing data.

How to edit incorrect data BEFORE billing data has been generated

1. Navigate to the Billing tab and locate the Attendance module. Click “Search”.
2. Enter the date you wish to search, inserting the date in the fields provided for Start and End Dates. Note: If you want to search for data specific to one day, both fields should be the same. If you wish to search for a range of dates, make the End date different from the Start date.
3. Within the region labeled “Required” identify the “Service Date”, “Attendance Type Name”, “Service Description (Code)”, “Program (Site)” in this specific order, i.e., top to bottom. Leave “Service Authorization Status” defaulted to “Approved”. For individuals living in an ICF, make sure to select “Day Services ICF” from the options provided. Click the “Search” button. The page refreshes to the “Attendance” page showing the list of individuals and dates matching the search criteria you used.
4. Note that the “Update” tab is highlighted in blue.
5. Click the “P”, “A”, or “NS”, the screen will refresh to the “Attendance Data Update” page.
6. Correct the relevant information.
7. In the comment box explain why you are updating/correcting this information.
8. Click “Update”.

NOTE: Once the “Generate Billing Data” has been clicked, individuals’ attendance data will no longer appear through a search because the data has been finalized and sent to billing.

You must “Generate Billing Data” **by 1 p.m. Mondays** and follow this up with an e-mail to the \_TherapBilling group stating that the billing data has been generated. The subject line will be “Billing Data Generated- [Program name]”, e.g., “Billing Data Generated- Wilton DH”. If you are not able to submit the billing data by this deadline, send an e-mail to the \_TherapBilling group stating the reason for the delay. The subject line will be “Billing Data Delay- [Program name]”, e.g., “Billing Data Delay- Wilton DH”. When the update has been made, send another e-mail to this group notifying them that the billing data has been generated. The subject line will be “Delayed Billing Data Generated- [Program name]”, e.g., “Delayed Billing Data Generated- Wilton DH”.

NOTE: If you find a mistake AFTER billing data has been generated, here is what you do:

To correct an error:

Step 1: Delete Billing Data

1. Navigate to the Billing tab, select “Search” for Billing Data within the Institutional Claim module.
2. Complete the field for “Program Name (Site)”
3. Complete the “From” field for “Service Date” selecting the date on which the error occurred.
4. Remove the entry for the “Create Date” (use the little “X” or just use the backspace key)
5. Click “Search”
6. Upon page refresh to the “Billing Data Search” page, select the entry corresponding to the name of the individual whose data you wish to correct. The screen will refresh to the “Billing Data” page.
7. Scroll down to the section “Billing Data Input” and make the required change(s). Update total billable units to “0”, or change the date.

Note: Do not change the field for “Unit Rate”.

1. If you are not the service provider, identify who provided the service from the list of names provided in the drop-down.
2. In comment box on the billing data page: Identify that unit of service has changed from one value to another, e.g., from half-day to full-day. Specify the reason for the change, e.g., time out was entered incorrectly, the number of billable services were entered incorrectly.
3. Click “Update”.

Step 2: Add New Billing Data

1. Navigate to the Billing tab, select “New” for “Billing Data within the Institutional Claim module.
2. Complete the field for “Individual Name”.
3. Leave the box for “Service Authorization End Date” the way it is.
4. Click “Search”
5. Select “Group Day Hab Full day” or “Group Day Hab Half Day” depending on what new billing data you want to enter.
6. Insert service date. Change total billing units to “1”.
7. In comment box on the billing data page: Identify that unit of service has changed from one value to another, e.g., from half-day to full-day. Specify the reason for the change, e.g., time out was entered incorrectly, the number of billable services were entered incorrectly, etc.
8. Click “Submit”.

Step 3: Correct Attendance Data

1. Navigate to the Billing tab and locate the Attendance module. Click “Search”.
2. Enter the date you wish to search, inserting the date in the fields provided for Start and End Dates. Note: If you want to search for data specific to one day, both fields should be the same. If you wish to search for a range of dates, make the End date different from the Start date.
3. Within the region labeled “Required” identify the “Service Date”, “Attendance Type Name”, “Service Description (Code)”, “Program (Site)” in this specific order, i.e., top to bottom. Leave “Service Authorization Status” defaulted to “Approved”. For individuals living in an ICF, make sure to select “Day Services ICF” from the options provided. Click the “Search” button. The page refreshes to the “Attendance” page showing the list of individuals and dates matching the search criteria you used.
4. Noting that the “Update” tab is highlighted in blue, complete the check box for “Submitted for Billing”. The screen will refresh showing the data meeting your search criteria in the column next to the individual’s name.
5. Click the “P”, “A”, or “NS”, the screen will refresh to the “Attendance Data Update” page.
6. Correct the information required.
7. In comment box on the billing data page: Identify that unit of service has changed from one value to another, e.g., from half-day to full-day. Specify the reason for the change, e.g., time out was entered incorrectly, the number of billable services were entered incorrectly. Identify who made the error and who made the correction.
8. Click “Update”.

Step 4: Email the \_TherapBilling group

The text of the message will include the name and date of service. The subject line will contain “Billing Error- [Program name]”, e.g., “Billing Error-Clifton Park DH”