Procedure for QA and approving Attendance Billing-Residential IRA

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” (pick Daily Supervised IRA), “Service Description (Code)” (pick Supervised Daily IRA (A100)), “Program (Site)” in this specific order, i.e., top to bottom. Leave “Service Authorization Status” defaulted to “Approved”. 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”, “T”, “R” or a “D”. Compare this attendance data to the paper record. Make any necessary corrections.

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

*When you are ready to approve the attendance, proceed to step 6:*

Step 6: While on the Approve tab, 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 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”, “T”, “R”, or “D,” 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” (pick Daily Supervised IRA), “Service Description (Code)” (pick Supervised Daily IRA (A100)), “Program (Site)” in this specific order, i.e., top to bottom. Leave “Service Authorization Status” defaulted to “Approved”. 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”, “T”, “R”, or “D” 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”.

When finished e-mail to the \_TherapBilling group stating that the attendance data has been generated. The subject line will be “Attendance Data- [Program name]”, e.g., “Attendance Data- (Graves Rd.)”.

Note: The **Weekly Attendance** will be submitted to the business office no later than 10:00 am on Mondays.