Billing Process Guide

Provider User Guide

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Document Revision History

Date	Description of Revision
10/08/2020	Initial version of the document
03/15/2021	Accessibility standards applied
06/21/2022	Non-Silverlight workflow applied
08/23/2022	General updates
04/18/2023	Apply general updates and remove Non-Silverlight references
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Overview

This process guide covers the Billing process and functionality via the HHAeXchange (HHAX) system, consisting of:

- Invoicing Visits
- The **Billing Review** functionality
- Rebilling
- Viewing **Remittances**

Please direct any questions, thoughts, or concerns regarding the content herein to HHAeXchange Customer Support.

HHAX System Key Terms and Definitions

The following provides basic definition of HHAX System key terms applicable throughout the document.

Term	Definition
Patient	Refers to the Member, Consumer, or Recipient. The Patient is the person receiving services.
Caregiver	Refers to the Aide, Homecare Aide, Homecare Worker, or Worker. The Caregiver is the person providing services.
Provider	Refers to the Agency or organization coordinating services.
Payer	Refers to the Managed Care Organization (MCO), Contract, or HHS. The Payer is the organization placing Patients with Providers.
HHAX	Acronym for HHAeXchange

The Billing Process

This section covers the process of invoicing visits and the mechanisms within HHAX that ensures exported invoices contain accurate billing information and follow all compulsory compliance and authorization rules set up by each unique Payer.

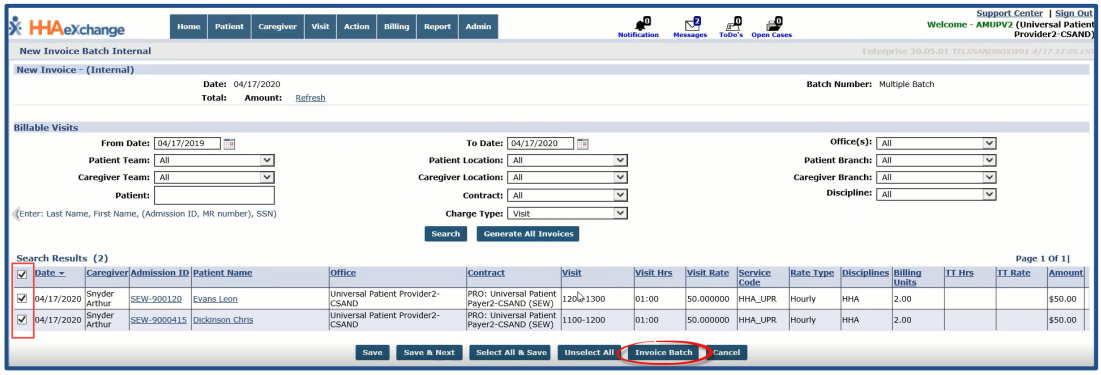
The **Billing Process** is completed in 3 phases, as follows:

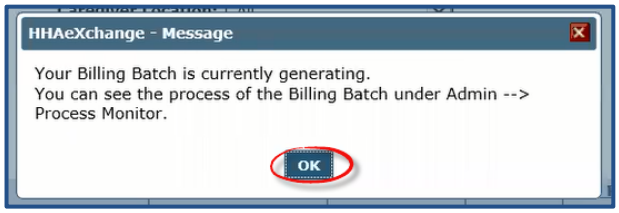
1. Creating a New Invoice Batch
2. Creating a New Claims Batch
3. Reviewing a Claims Batch (Optional)

Each phase is covered in the following sections.

New Invoice Batch (Internal)

Once a confirmed visit clears the *Prebilling Review* exception page (covered in the Prebilling Process Guide) it can be **Invoiced** or processed and packaged to submit to a Payer. When visits are invoiced in HHAX, the system compiles all the selected visits to be invoiced, at the time of processing, in an **Invoice Batch**. Follow the steps below to invoice a visit and compile a **New Invoice Batch**.

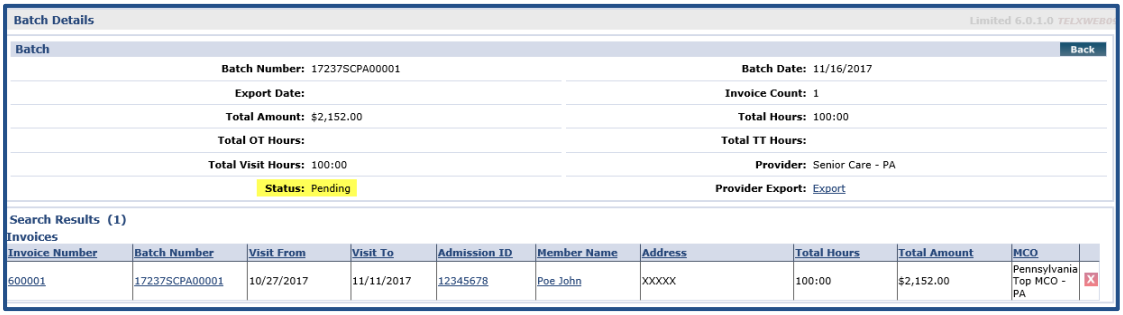
Step	Action
1	Navigate to ***Billing > New Invoice - (Internal)*** to generate a New Invoice Batch. Search for a specific visit using the filters or click on ***Search*** to generate all results. ***Note:*** *To search all prior visits (eligible for invoicing), HHAX recommends that the* ***From Date*** *field is left blank.*
2	Review the results and select the visits to invoice.  **New Invoice Batch (Internal): Invoice Batch**

Step	Action
3	Once the visits are selected, there are various options at the bottom of the page as described in the bullets below. Select an action button to proceed. To invoice, click on the ***Invoice Batch*** button. • **Save:** Saves all the selected visits without invoicing them. From here, navigate to the next page of search results (if applicable) without losing the selection. • **Save & Next:** Saves all the selected visits and loads the next page of search results (if applicable). • **Select All & Save:** Saves all visits on the current page. From here, navigate to the next page of search results (if applicable) without losing the selection. • **Unselect All:** Unselect any selected/saved visits. • **Invoice Batch:** Invoice all selected visits and generate a new **Invoice Batch.** • **Cancel:** Cancel entire batch
4	The system alerts that the Billing Batch is generating. Click ***OK*** to continue.  ***Note:*** *Once invoiced, visit information cannot be changed.*
5	Perform the Billing Review process to review any exceptions prior to submitting claims to the Payer. Refer to the Billing Review section for details.

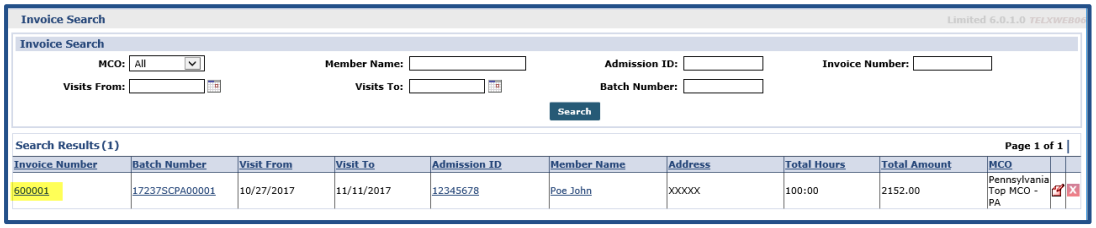
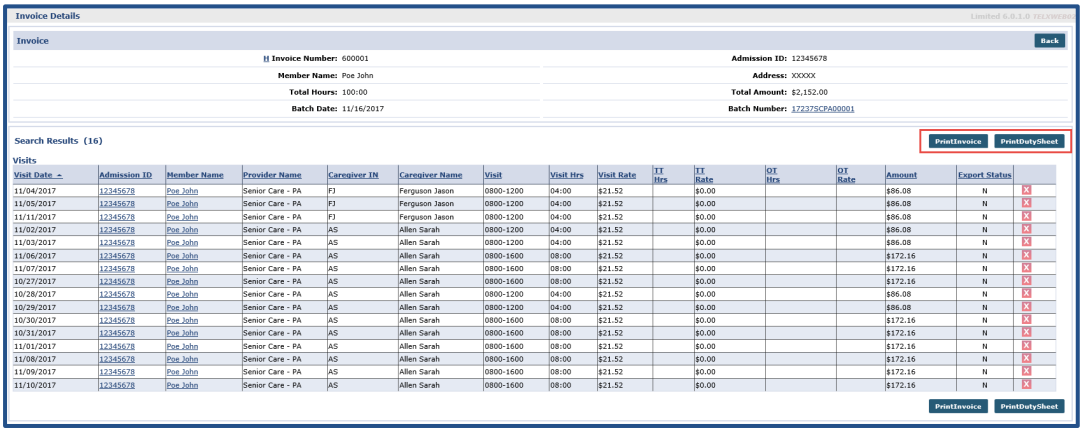
Review Invoice Details

Reviewing processed invoices, specifically those with a *Pending* **Status** (not yet exported from HHAX) allows Providers another opportunity to identify clerical errors that could be missed by the *Prebilling Review* or *Billing Review* exception pages. Complete the following steps to review the details of processed invoices **By Batch**, **By Invoice** and **By Visit** (as described in the following tables per option).

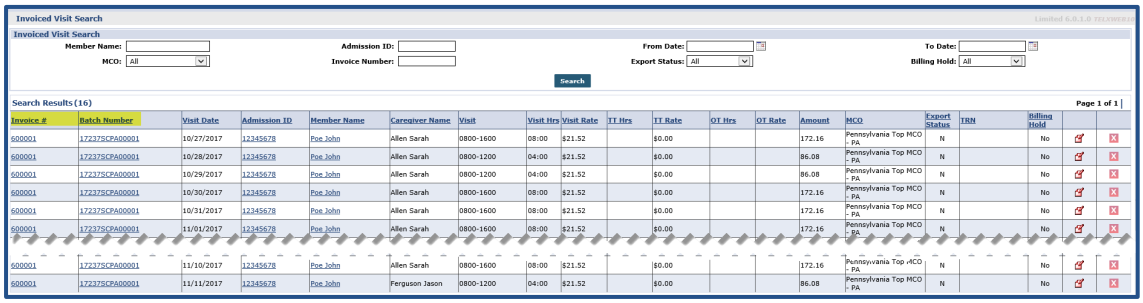
By Batch

Step	Action
1	Navigate to ***Billing > Invoice Search > By Batch***
2	Search for the batch using the available filters. Click the ***Search*** button.
3	The results generate invoice batches accordingly. Locate the batch and click on the **Batch Number** (link) to review the individual invoices within a batch. **Search by Batch**
4	Review the details. If an error is discovered, then a visit (with a *Pending* **Status**) can be removed from an invoice by using the delete "X" icon. Once an invoice has been exported (with a *Billed* **Status**), visit information cannot be edited (or removed).  **Invoices within a Batch**
5	Click the ***Back*** button to navigate back to the search results page.

By Invoice

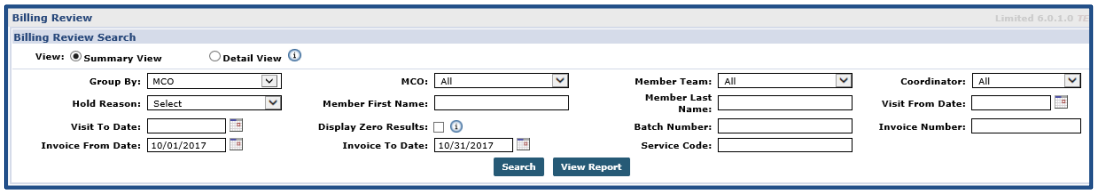
Step	Action
1	Navigate to ***Billing > Invoice Search > By Invoice***
2	Search for the invoice using the available filters. Click the ***Search*** button.
3	The results generate invoices accordingly. Locate the invoice and click on the **Invoice Number** (link) to review the individual invoice details.  **Search by Invoice**
4	Review the details. If an error is discovered, then a visit (with a *Pending* **Status**) can be removed from an invoice by using the delete "X" icon. Once an invoice has been exported (with a *Billed* **Status**), visit information cannot be edited (or removed). Click the ***Print Invoice*** button to print the invoice. Click ***Print Duty Sheet*** button to print the Duty Sheet associated with the invoice (if/as applicable).  **Visits within an Invoice**
5	Click the ***Back*** button to navigate back to the search results page.

By Visit

Step	Action
1	Navigate to ***Billing > Invoice Search > By Visit***
2	Search for the visit using the available filters. Click the ***Search*** button.
3	The results generate invoiced visits accordingly. Locate the visit and click on the **Invoice Number** (link) to review the invoice the visit was included in, or the **Batch Number** link to review the batch the visit was included in.  **Search by Visit**
4	Review the details. If an error is discovered, then a visit (with a *Pending* **Status**) can be removed from an invoice by using the delete "X" icon. Once an invoice has been exported (with a *Billed* **Status**), visit information cannot be edited (or removed).
5	Click the ***Back*** button to navigate back to the search results page.

Billing Review

The *Billing Review* page is used to check invoiced visit information against export requirements specific to each Payer. Invoiced visits that do not meet the export requirements are held on this page until the issue is corrected. Complete the following steps to review invoiced visits held in the *Billing Review* page.

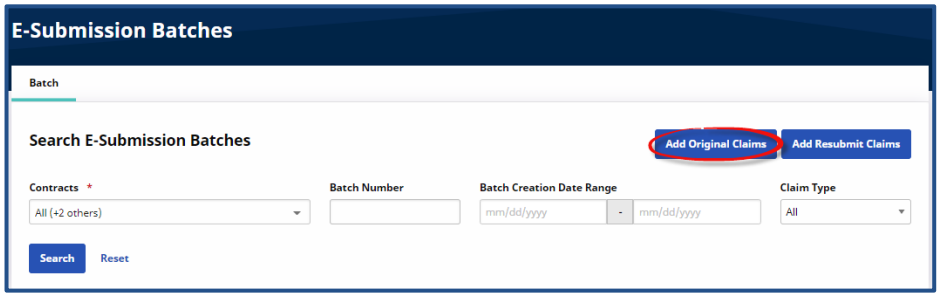
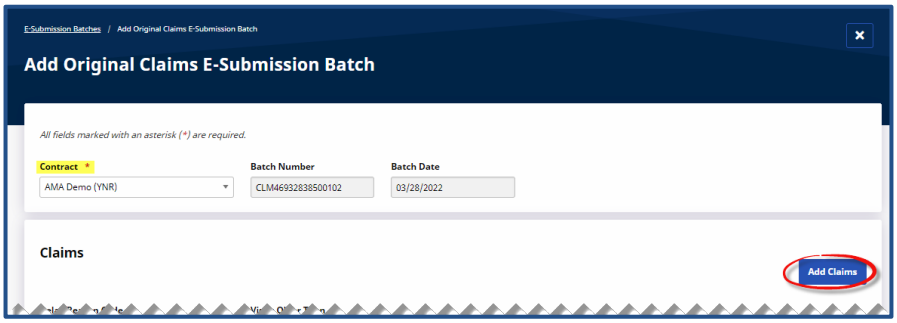
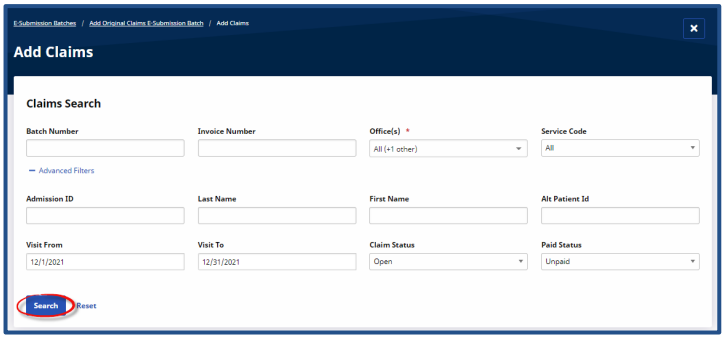
Step	Action
1	Navigate to ***Billing > Billing Review***
2	Search to view all invoiced visits held in Billing Review. Click the ***Search*** button for all held visits or specify search criteria using the available filters (such as **Payer**, **Hold Reason**, and **Invoice To**/**From** date ranges).  **Billing Review Search Filters**
3	The results (summary) are generated beneath the search fields and filters. By default, the system sorts by Payer. As illustrated, this summary provides a breakdown of the number of visits on hold by type (*Hourly*, *Daily*, and *Visit*) as well as the **Total Amount on Hold** (total dollar amount on hold). The value under the **Total Visits** column is a link which loads a new screen displaying the search results in a detailed view. Click the *number* (link) to proceed (in this case, "9"). **Billing Review: Summary View**

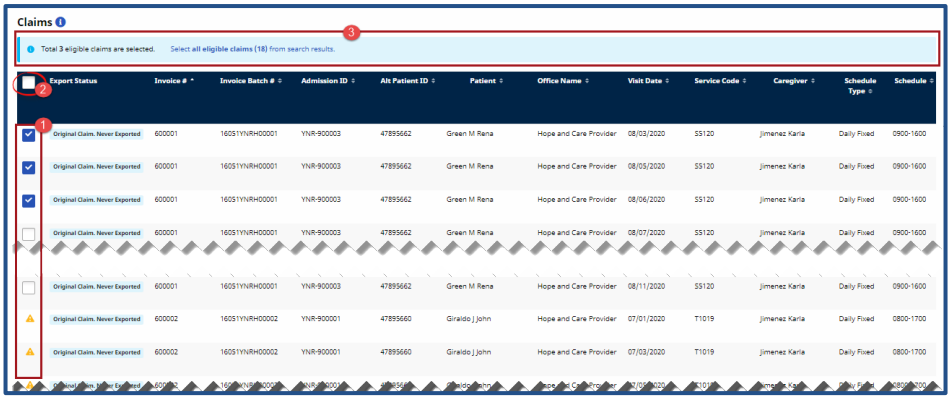
Step	Action
4	The *Detailed View* window displays the **Hold Reasons** per visit. **Billing Review: Detailed View**
5	To resolve **Hold Reasons**, navigate directly to the Patient Profile and the Visit Window by selecting the **Patient Name** and **Visit Date** links for the corresponding visit, respectively. **Patient Name and Visit Date Links**
6	When the **Hold Reason** is resolved, the system automatically releases the visit from the *Billing Review* page.

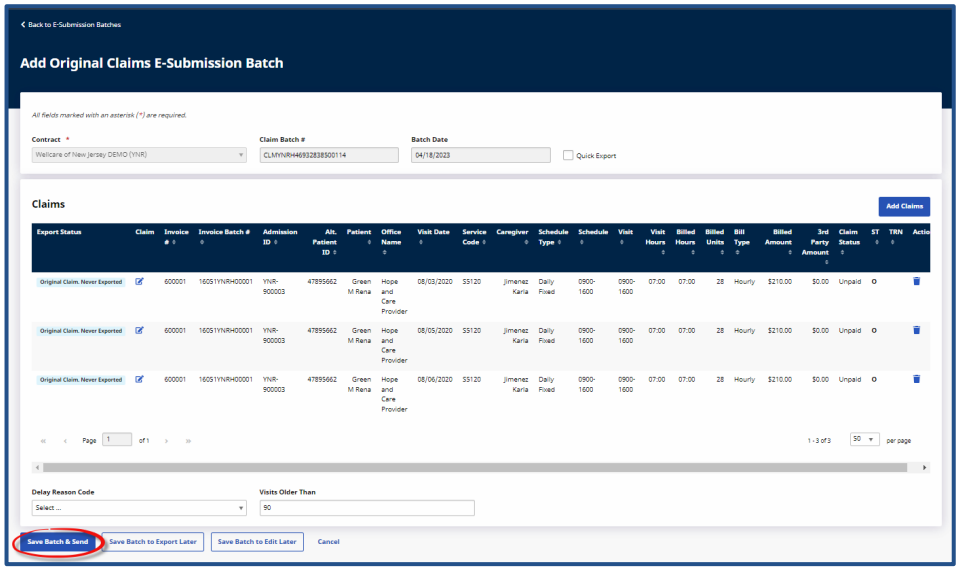
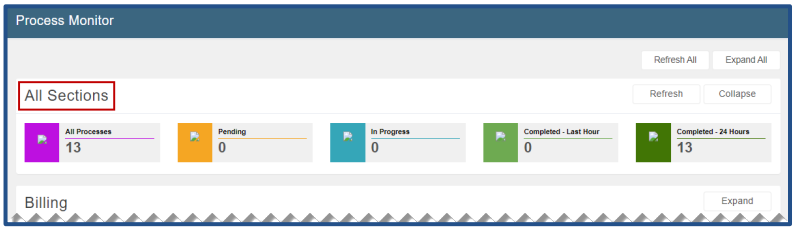
Refer to the Billing Review Resolutions Job Aid for guidance on resolving various types of Hold Reasons.

Create a New Claims Batch

The next step is to generate a New Claims Batch. Complete the following steps to create a New Claims Batch.

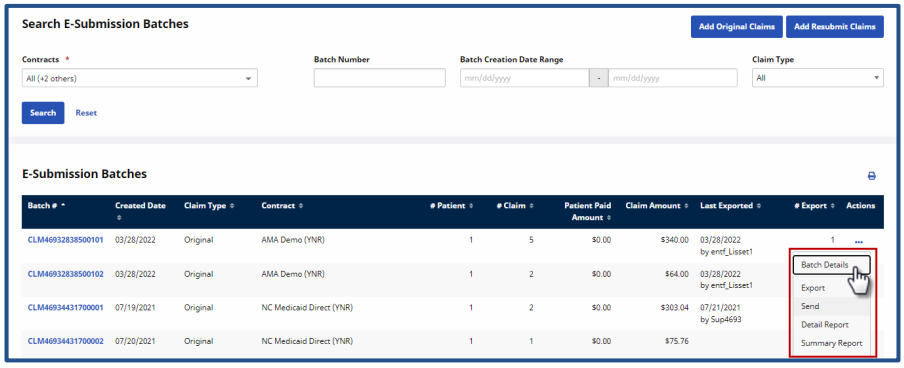
Step	Action
1	Navigate to ***Billing > Electronic Billing > E-Submission Batches*** to generate a New Batch Claim.
2	On the *E-Submission Batches* page, click on the ***Add Original Claims*** button.  **Add Original Claims**
3	On the *Add Original Claims E-Submission* page, select the **Contract**. The **Batch Number** and **Batch Date** populate. Click on the ***Add Claims*** button.  **Add Claims**
4	On the *Add Claims, Claims Search* page, use the search filter fields or click on the ***Search*** button to find claims.  **Claims Search**

Step	Action
5	On the Search Results in the *Claims* section, select the claims to be added. There are 3 selection options, as follows: 1. Click on a specific row checkbox to select individual claim(s). 2. Select the header checkbox to select all the claims on the current page (only). Note that selecting this box does not select all claims in the search results. 3. Click on the Select all eligible claims (count) link in the light blue banner to select all eligible claims in the entire set of search results (across all pages).  **Claims Search: Select Claim(s)** ***Note:*** *Visits with a yellow warning icon (with no active checkbox) are held in Billing Review with an On Hold Status and must be resolved prior to billing. The* ***Export Status*** *column indicates the hold reason.*
6	Once the claims are selected, click on the ***Add*** button at the bottom of the page.

Step	Action
7	The claims appear on the *Add Original Claims E-submission Batch* page. Click on the ***Save Batch & Send*** button to send the claims to the SFTP to be picked up by the Payer system via the overnight process.  **Claims E-Submission: Save Batch & Send** ***Note:*** *Using the* ***Save for Later*** *button only creates the claims batch but does not send to the SFTP. Refer to Reviewing a Claims Batch for further instructions.*
8	The system alerts that the export file is generating. Click ***Close*** to continue.
9	(Optional) Navigate to ***Admin >Process Monitor*** to view the progress of the submission. Expand the **All Sections** category to view. The file can either be in *Pending* or *Completed* status.  **Process Monitor: All Sections**

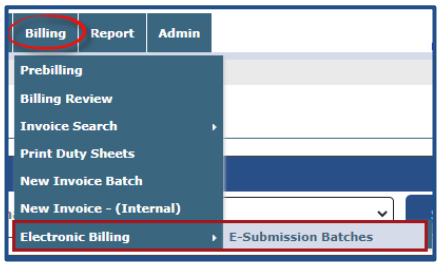
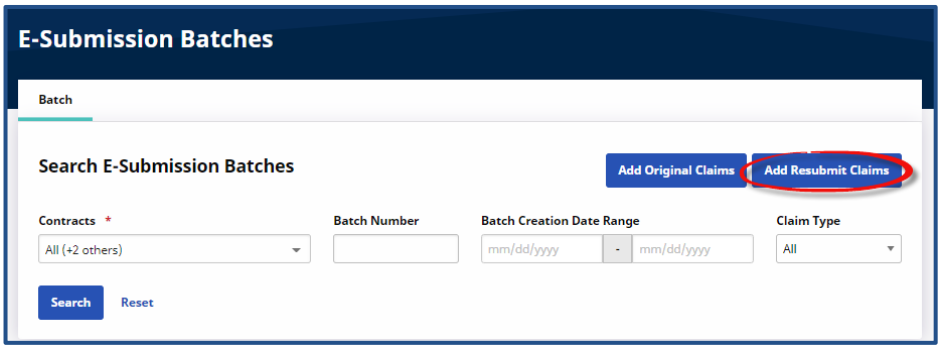
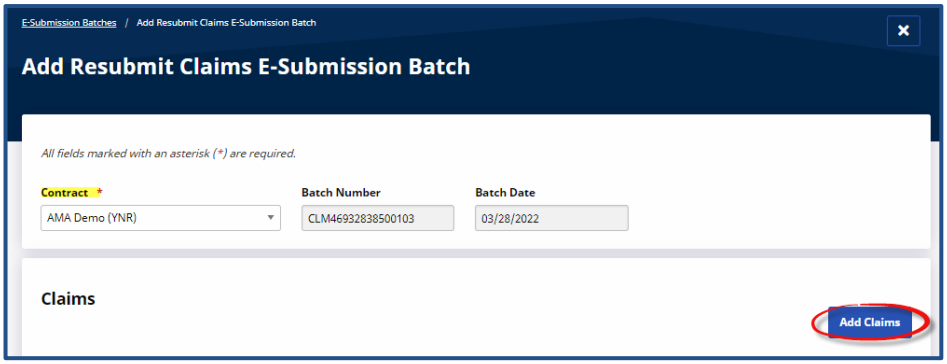
Reviewing a Claims Batch (Optional)

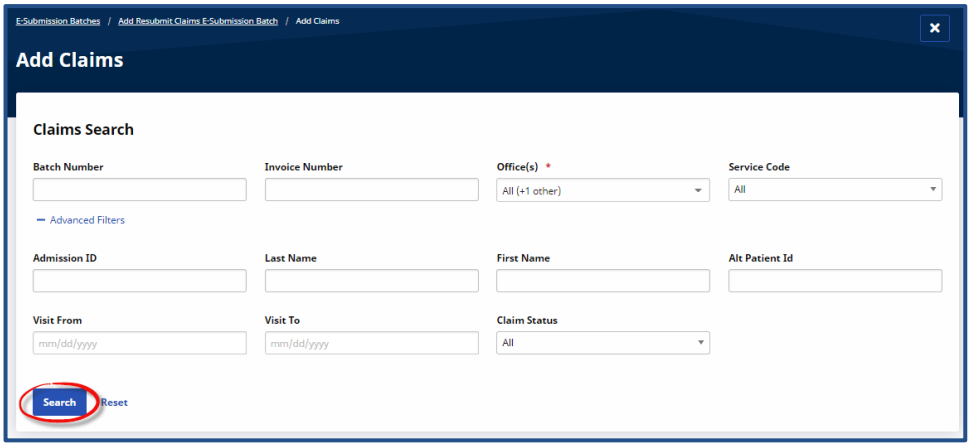
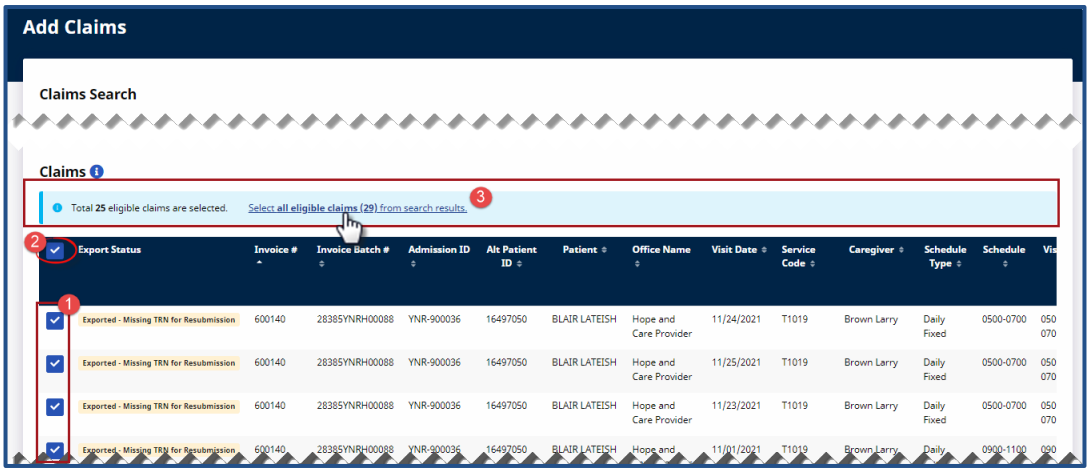
The final step (optional) in the billing process is to review the claims batch. Follow the steps below to review claims batches. If claims are saved but not sent, follow the instructions below to *Send* the claims batch.

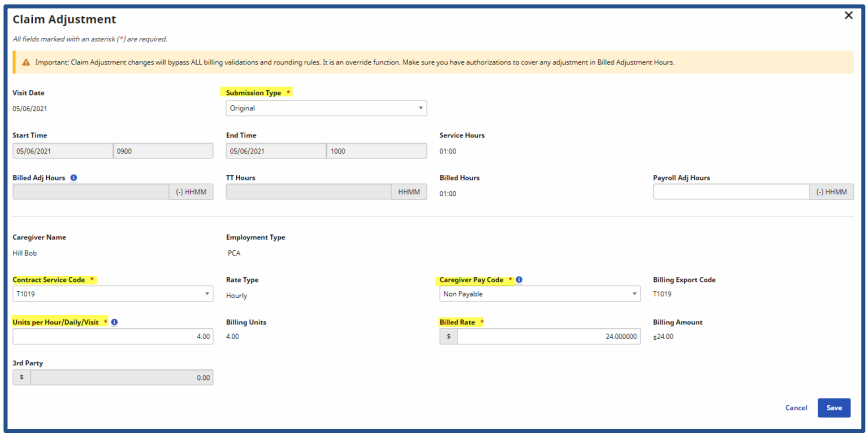
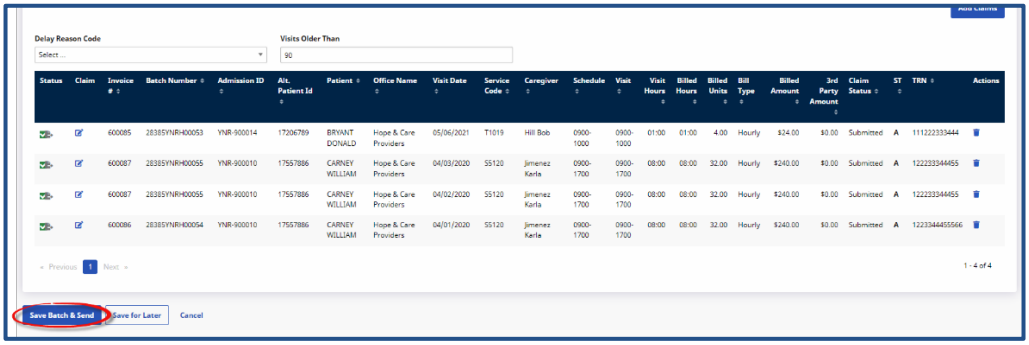
Step	Action
1	Navigate to the Batch Search window (***Billing >Electronic Billing > E-Submission Batches***) to review the claims.
2	On the *E-Submission Batches* page, select a contract from the **Contracts** field and click on the ***Search*** button to search for batches. On the Search Results, locate the batch and click on the ellipsis (**…**) under the **Actions** column for a list of menu options to include *Batch Details*, *Export*, *Send*, *Detail Report*, and *Summary Report* (as seen in the following image).  **Review a Claims Batch** ***Note:*** *If the batch has been submitted to the SFTP, then the Send option appears unavailable to select. If the Send option appears available, then the claim has not been sent.*
3	Select the *Send* option to manually send a claims batch to the SFTP.

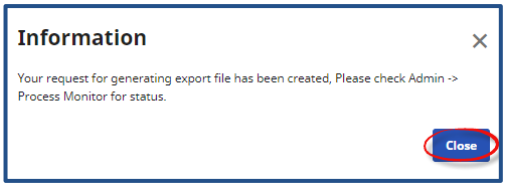
Rebilling (Resubmit Claims)

Providers can rebill a claim directly in the system to address any claims issues when initially submitting the claim.

Step	Action
1	Navigate to ***Billing > Electronic Billing > E-Submission Batches.***  **Path to E-Submission Batches**
2	On the *E-Submission Batches* page click on the ***Add Resubmit Claims*** button.  **Add Resubmit Claims**
3	On the *Add Resubmit Claims E-submission Batch* page, select the **Contract**. The system automatically generates a **Batch Number** and the **Batch Date** for the claims resubmission. Click on the ***Add Claims*** button.  **Add Claims**

Step	Action
4	On the *Add Claims, Claim Search* page, select applicable filter fields and click ***Search***.  **Add Claims: Claims Search**
5	From the Search Results, select the claims to add to the batch. There are 3 selection options, as follows: 1. Click on a specific row checkbox to select individual claim(s). 2. Select the header checkbox to select all the claims on the current page (only). Note that selecting this box does not select all claims in the search results. 3. Click on the Select all eligible claims (count) link in the light blue banner to select all eligible claims in the entire set of search results (across all pages).  **Select Claims** ***Note:*** *The* ***Export Status*** *column provides a high-level indication of the state of the claim and possible missing information.*
6	Once all desired claims are selected, click on the ***Add*** button at the bottoms of the page.

Step	Action
7	On the *Add Resubmit Claims E-submission Batch* page, click on the edit icon ( ) to open the Claims Adjustment window. ***Note:*** *To delete a record from the claim to be resubmitted click on the icon under the* ***Actions*** *column.* **Select Claim to Adjust**
8	The *Claim Adjustment* window opens. Select the **Submission Type** (refer to the Rebilling Adjustment Type section below for guidance). Correct any applicable fields ensuring that required fields (denoted with a red asterisk) are completed. ***Note:*** *The* ***Billed Adjusted Hours, TT Hours****, and* ***3rd Party*** *fields cannot be edited when resubmitting a claim.*  **Claim Adjustment Window**
9	Once saved and ready to resubmit, click on the ***Save Batch & Send*** button on the *Resubmit Claims E-submission Batch* page.  **Resubmit Claim**

Step	Action
10	The system alerts that the export file is generating. Click ***Close*** to continue. 

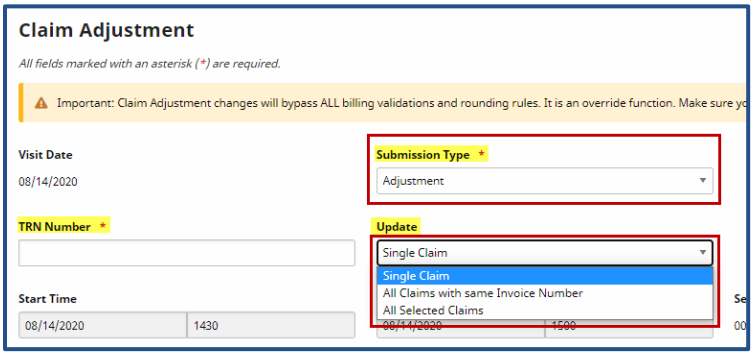
Rebilling Adjustment Types

Original

Original is the default setting used if the Provider does not edit the Submission Type.

Adjustment

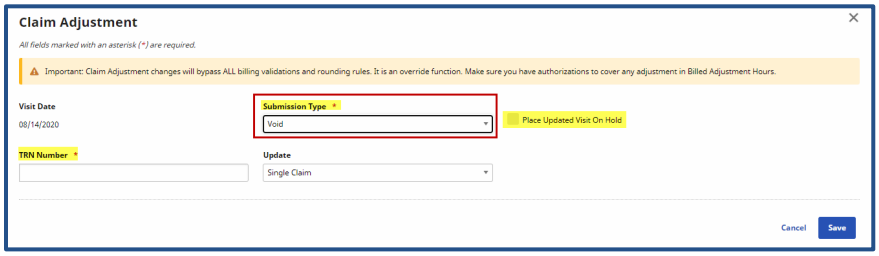
The **TRN Number*** and **Update** fields are required if *Adjustment* is selected. For the **TRN Number**, indicate if this adjustment is for a *Single Claim*, *All Claims with same Invoice Number*, or *All Selected Claims*. Refer to the bullets below this table for guidance.



***TRN** refers to Transaction Reference Number, unique claim identifier number to be adjusted. The **TRN** can also be referred to as the *Form Number*, *Claim ID*, or *Claim Number*. The **TRN** is also located on the Electronic Remittance Advice (ERA).

Void

When selecting *Void*, the **TRN Number** is required and the **Place Updated Visit on Hold** checkbox is automatically selected and un-editable. Select the applicable **Update** option (*Single Claim*, *All Claims with same Invoice Number*, or *All Selected Claims*).



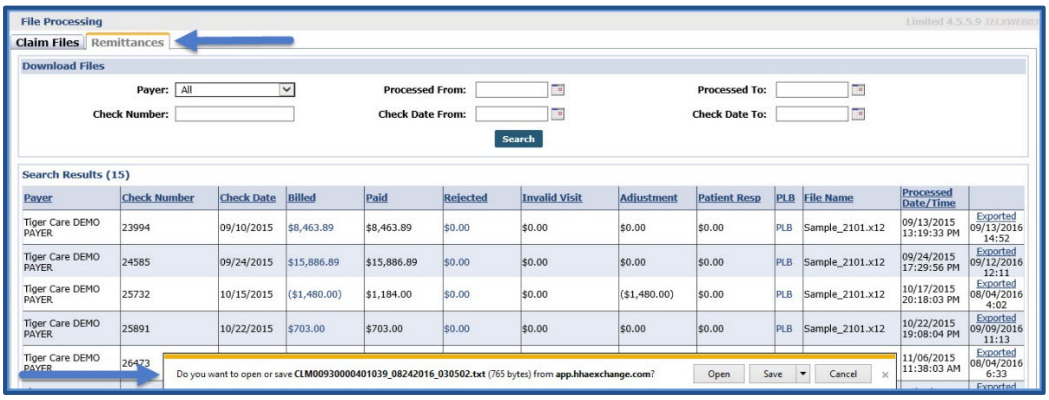
***Note:** Selecting Void hides other adjustment information fields on the window.*

Once adjusted, click ***Save*** to update the selected record(s). Based on the selected **Submission Type**, respective **TRN Number**, and **Update** option, the selected records are updated accordingly.

- If *Single Claim* is selected (from the **Update** field), then only the current record for the selected **Submission Type** and **TRN Number** is updated.
- If the *All Claims with same invoice number* is selected (from the **Update** field), then all matching records with the same Invoice Number are updated according to the chosen **Submission Type** and **TRN Number**.
- If *All Selected Claims* is selected, then all records are updated with chosen **Submission Type** and **TRN Number**.

Remittances Tab

The *Remittances* tab (***Admin > File Processing***) maintains a record of all **835 Remittance Files** that have been sent back from clearinghouses. The files can be exported from the *Remittances* tab and processed in an external application. Complete the following steps to download **835 Remittance Files**.

Step	Action
1	Navigate to ***Admin > File Processing > Remittances***
2	Click the ***Search*** button to review all remittance files or select search filters to narrow the search results.
3	In the results, click the **Export** link in the right most column.
4	A notification appears in-browser, prompting the user to open or save the 835 Remittance File.  **Remittances Tab**
5	Save the file to the desired location.