



# Prebilling Process Guide

Provider User Guide

# Document Revision History

Date	Description of Revision
09/25/2020	Initial version of the document
03/15/2021	Accessibility standards applied

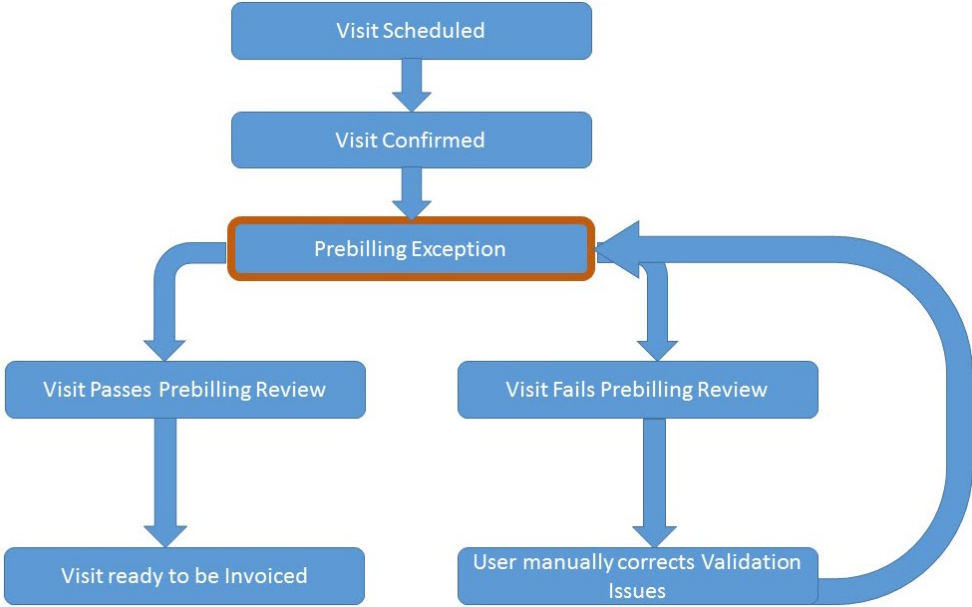
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# Overview

**Prebilling** is one of the *Exception* pages in the HHAExchange (HHAX) system. The *Exception* pages are automated auditing processes which ensure that visits with missing or incorrect information do not get invoiced and billed.

The **Prebilling** page checks visits to ensure that all validation requirements established by the Payer are met. If a visit does not meet all the validation requirements, then it is 'held' on this page until the issue is manually corrected. Visits held on any of the exception pages cannot be processed for billing.



Please direct any questions, comments, or concerns regarding the content herein to [HHAExchange Client Support](#).

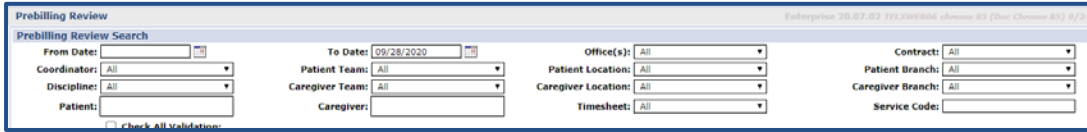
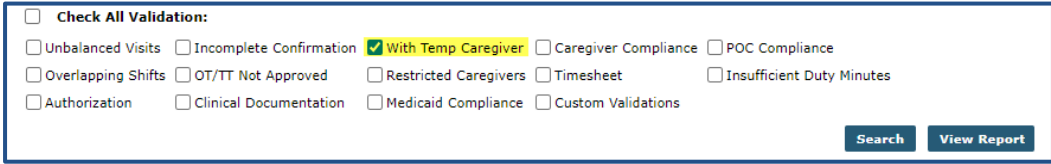
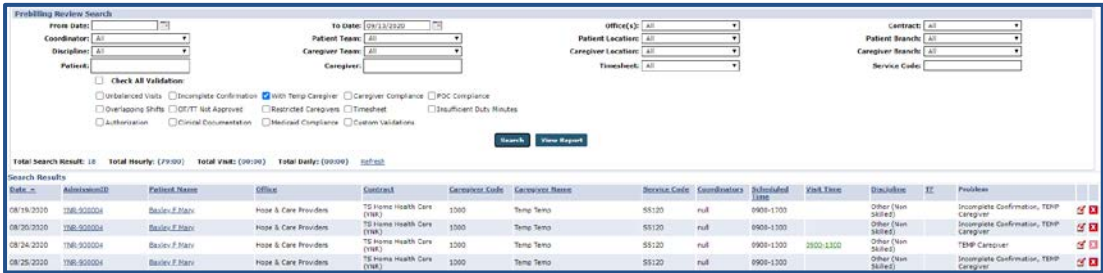
## HHAX System Key Terms and Definitions

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

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

# The Prebilling Exception Page

The **Prebilling Review** page is where visits are reviewed once scheduled. Visits that do not meet the validation requirements set forth by the Payer are held in the Prebilling Exception page. Follow the steps below to review visits that are held on the Exception page.

Step	Action
1	Navigate to <b>Billing &gt; Prebilling</b> .
2	<p>Select search parameters using the available filters.</p>  <p><b>Note:</b> Select a date range with no <b>From Date</b>, and a <b>To Date</b> of yesterday. This ensures that in the search results no older held visits are missed and current day visits are skipped (as these may in progress and not fully confirmed until a later time/date).</p>
3	<p>Under the search fields, select the checkboxes to specify which validations the search result returns. For example, to review all visits held due to the <i>With Temp Caregiver</i> validation, select the corresponding checkbox (as illustrated below).</p>  <p style="text-align: center;"><b>Search by Validations</b></p>
4	<p>In the results, each row is a visit with at least one failed validation. Each line item contains visit details, as well as the failed validation reasons in the <b>Problem</b> column.</p> <p>Click the <a href="#">Patient Name</a> (link) to navigate to the Patient Profile.</p>
5	Click the delete “ <b>X</b> ” icon to delete the visit, or the edit “” icon to open the Visit Window.
6	<p>To resolve a Prebilling issue, the failed validation (<b>Problem</b>) must be corrected. For example, if the listed <b>Problem</b> is <i>With Temp Caregiver</i>, then the visit remains in Prebilling until a Caregiver is assigned to the visit.</p>  <p style="text-align: center;"><b>The Prebilling Page</b></p> <p><b>Note:</b> Validation requirements vary from Payer to Payer.</p>

# Prebilling Validations

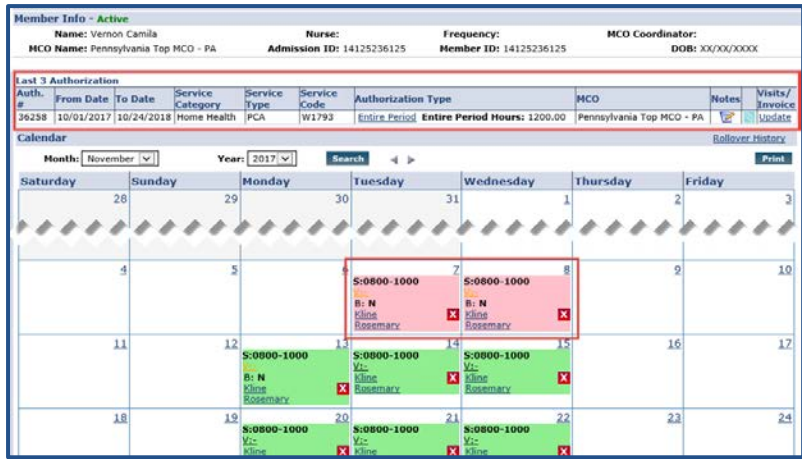
This section provides a step-by-step walkthrough of correcting the various validation errors that hold visits on the Prebilling exception page. The remainder of this process guide focuses on resolving **Prebilling Review** issues in HHAX. This guide does not cover how to resolve these issues in 3<sup>rd</sup> party software.

## Authorization

Any visit that does not adhere to an **Authorization** rule is held on the *Prebilling* page. This is the most common validation infraction, as there are many ways in which a visit may break an **Authorization** rule. A few examples include:

- The visit was scheduled with an unauthorized **Service Code**;
- The visit was scheduled outside the specified date range of the **Authorization**;
- The visit exceeded the units allotted by the **Authorization**.

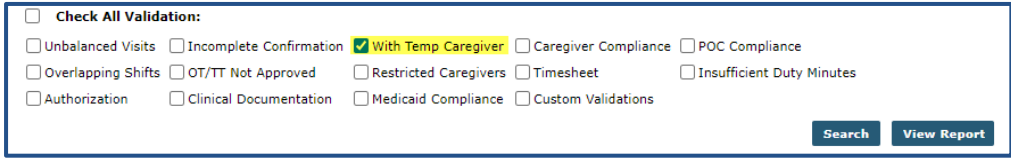

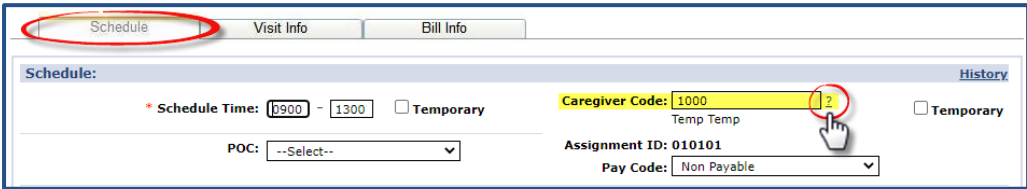
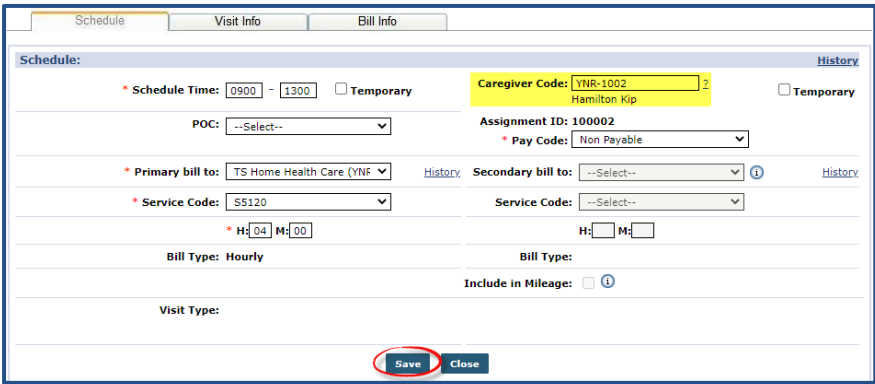
Complete the following steps to correct held visits that break an Authorization rule.

Step	Action
1	Navigate to <b>Billing &gt; Prebilling</b> to search and locate the applicable Patient. Click on the <a href="#">Patient Name</a> (link) to access the Patient's profile.
2	Select the <i>Calendar</i> page from the left nav.
3	Review the <b>Last 3 Authorizations</b> and the open the Visit Window for the visit in question. <div style="text-align: center;">  <p><b>Patient Calendar Page</b></p> </div>
4	Select the golden "V" to correct each visit denoted in pink (as illustrated above). Ensure the visit information matches the <b>Authorization</b> requirements. Once corrected, click <b>Save</b> to finalize. <p><b>Note:</b> In some cases, the <b>Authorization</b> validation error cannot be corrected. This may be because the visit was scheduled outside the effective date range of the <b>Authorization</b>, it was scheduled on an unauthorized day, or the number of allotted units has been exceeded.</p>

## With TEMP Caregiver

The **With Temp Caregiver** validation catches visits that have a TEMP Caregiver assigned to them. Visits with TEMP Caregiver assigned are also applicable to the **Incomplete Confirmation** validation; as there is no way for a Caregiver to place an EVV for the visit. These calls are stored in the **Call Dashboard**, but not synced to the visit.

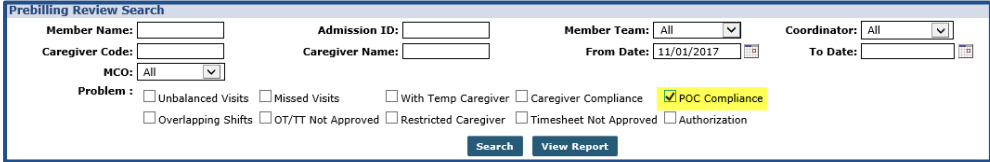

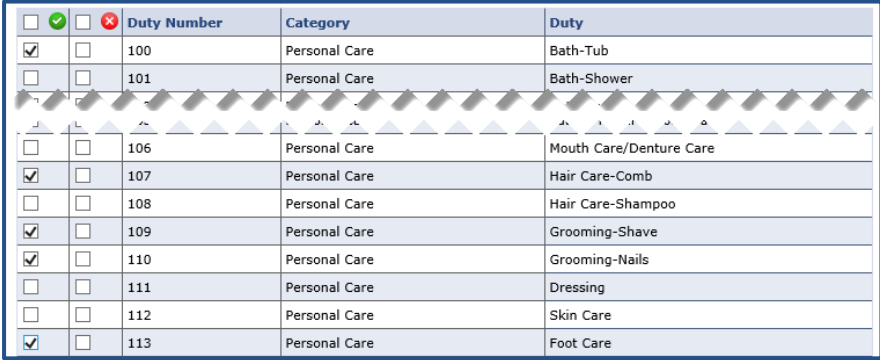
Complete the following steps to assign a Caregiver from the Prebilling Review page.

Step	Action
1	<p>Navigate to <b>Billing &gt; Prebilling</b>. Select the “With Temp Caregiver” checkbox and search for the visit.</p>  <p style="text-align: center;"><b>Prebilling Review Search: With Temp Caregiver</b></p>
2	<p>Locate the visit and click on edit icon as shown.</p>  <p style="text-align: center;"><b>Visit held at Prebilling: Temp Caregiver</b></p>
3	<p>Go to the <i>Schedule</i> tab. Click the <a href="#">?</a> (hyperlink) to search for the applicable Caregiver.</p>  <p style="text-align: center;"><b>TEMP Caregiver Assigned</b></p>
4	<p>Select the applicable Caregiver and click <b>Save</b>.</p>  <p style="text-align: center;"><b>Caregiver Assigned</b></p>
5	<p>Confirm the visit. Using the <b>Call Dashboard</b>, locate the Caregiver who worked the visit and placed EVV calls, and link to the visit.</p>

## POC Compliance

The **POC Compliance** validation checks to ensure the required compliance rules, specific to each Payer, have been fulfilled.

Complete the following steps to resolve POC Compliance issues from the Prebilling Review page.

Step	Action
1	<p>Navigate to <b>Billing &gt; Prebilling</b>. Select the “POC Compliance” checkbox and search for the visit.</p>  <p style="text-align: center;"><b>Prebilling Review Search: POC Compliance</b></p>
2	<p>Locate the visit and click on edit icon as shown.</p>  <p style="text-align: center;"><b>Visit held at Prebilling: POC Compliance</b></p>
3	<p>The <i>Visit Info</i> tab populates. Complete any required fields and scroll to the Duty Sheet section. Select the duties performed by the Caregiver on this visit.</p>  <p style="text-align: center;"><b>POC Duties</b></p>
4	<p>Click <b>Save</b> to finalize.</p>
5	<p>Confirm the visit, if/as needed.</p>



## Overlapping Shifts

The **Overlapping Shifts** validation flags visits with overlapping confirmations. This issue may be caused by either **Shift Overlapping** or **Caregiver Overlapping** as defined in the following examples.

A **Shift Overlapping** occurs when a single Patient has shifts with different Caregivers who have overlapping confirmations; typically happens during the Caregiver transition in “split shift” cases.

For example, Patient Benjamin Franklin is scheduled from 0800-1000 for shift 1, and 1000-1200 for shift 2. The Caregiver on shift 2 places her call ten minutes before the Caregiver on shift 1 places her call, creating the overlap.

Member Name	Caregiver Name	Scheduled Time	Visit Time	Discipline	Problem		
Franklin Benjamin	Cox Sandra	0800-1000	0800-1005	HHA	Shift Overlapping		
Franklin Benjamin	Taylor Jan	1000-1200	0955-1200	HHA	Shift Overlapping		

Visit held at Prebilling: Shift Overlapping

In the case of a **Caregiver Overlapping**, a **single Caregiver** has shifts that overlap, usually occurring with “linked cases” where the Caregiver is working for multiple individuals in the same location (scheduled back-to-back).

For example, Caregiver Jan Taylor is scheduled for Patient 1 at 1500-1700, then at Patient 2 from 1700-2000. Her confirmations overlap by ten minutes.

Member Name	Caregiver Name	Scheduled Time	Visit Time	Discipline	Problem		
Rooney Michael	Taylor Jan	1500-1700	1500-1705	HHA	Caregiver Overlapping		
Franklin Benjamin	Taylor Jan	1700-2000	1655-2000	HHA	Caregiver Overlapping		

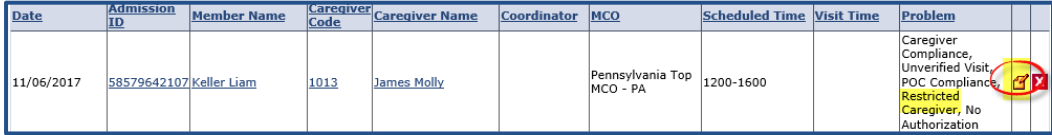
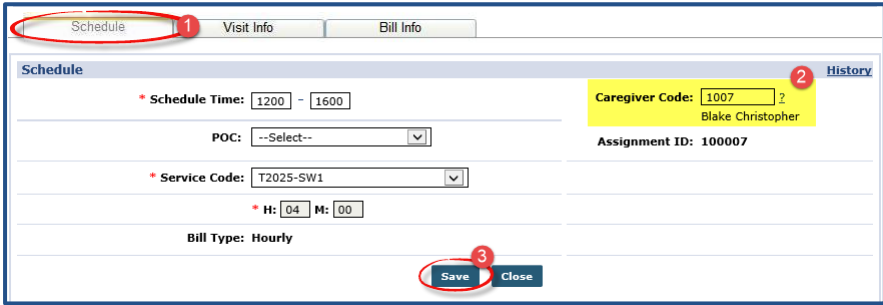
Visit held at Prebilling: Caregiver Overlapping

Both validation issues may be corrected by completing the following steps.

Step	Action
1	On the <i>Prebilling</i> page, click the edit icon to open the visit details.
2	On the <i>Visit Info</i> tab, manually adjust the Confirmed Times to eliminate the overlap. <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid black; margin-bottom: 5px;"> <span>Schedule</span> <span style="border-bottom: 2px solid orange;">Visit Info</span> <span>Bill Info</span> </div> <div style="border-bottom: 1px solid black; margin-bottom: 5px;"> <p><b>Visit Information</b></p> <p>Scheduled Time: 0800-1000</p> </div> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p>Visit Start Time: <input type="text" value="0800"/> <input type="text" value="07/02/2017"/></p> </div> <div style="width: 45%;"> <p>Visit End Time: <input type="text" value="1000"/> <input type="text" value="07/02/2017"/></p> </div> </div> </div> <p style="text-align: center; margin-top: 5px;">Visit Info Tab</p>













## Restricted Caregiver

The **Restricted Caregiver** validation holds visits worked by Caregivers who have been marked as Restricted for a date prior to that of the Confirmed visit. Complete the following steps to correct this issue.

Step	Action
1	Navigate to <b>Billing &gt; Prebilling</b> . Select the “Restricted Caregiver” checkbox and search for the visit.
2	Once located, click the edit icon as indicated on the image.  <p style="text-align: center;"><b>Visit held at Prebilling: Restricted Caregiver</b></p>
3	Select the <i>Schedule</i> tab. On the <i>Schedule</i> tab of the visit window, change the <b>Caregiver</b> assigned to the visit.  <p style="text-align: center;"><b>Select new Caregiver</b></p>
4	Click <b>Save</b> to finalize.
5	Confirm the visit, if/as needed.

## Timesheet

The **Timesheet** validation indicates that a “Timesheet Required” condition is required for a visit, but the **Timesheet Approved** checkbox is not selected. Complete the following steps to correct this issue.

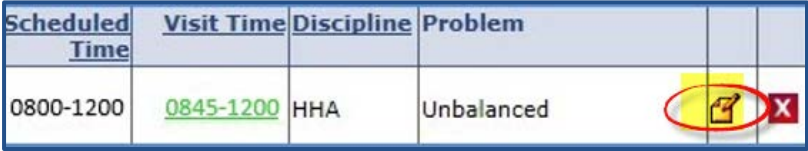
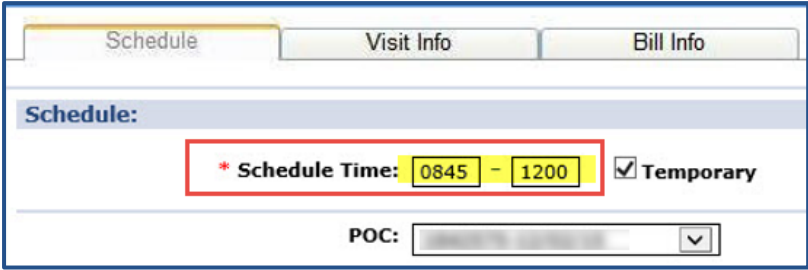
Step	Action														
1	Navigate to <b>Visit &gt; Visit Search</b> . Select the held visit on the Prebilling page.														
2	<p>Once located, click the edit icon as indicated on the image.</p> <table border="1"> <thead> <tr> <th>Caregiver Name</th> <th>Service Code</th> <th>Coordinators</th> <th>Scheduled Time</th> <th>Visit Time</th> <th>Discipline</th> <th>Problem</th> </tr> </thead> <tbody> <tr> <td>Anderson Rebecca</td> <td>HHA</td> <td>Jon Franqui</td> <td>1000-1400</td> <td>1000-1400</td> <td>HHA</td> <td>Timesheet Not Approved  </td> </tr> </tbody> </table> <p style="text-align: center;"><b>Visit held at Prebilling: Timesheet Not Approved</b></p>	Caregiver Name	Service Code	Coordinators	Scheduled Time	Visit Time	Discipline	Problem	Anderson Rebecca	HHA	Jon Franqui	1000-1400	1000-1400	HHA	Timesheet Not Approved  
Caregiver Name	Service Code	Coordinators	Scheduled Time	Visit Time	Discipline	Problem									
Anderson Rebecca	HHA	Jon Franqui	1000-1400	1000-1400	HHA	Timesheet Not Approved  									
3	<p>On the <i>Visit Info</i> tab of the visit window, select the <b>Timesheet Approved</b> checkbox.</p> <table border="1"> <tr> <td>Duty Sheet POC: 0(00:00)</td> <td>Others: 7(00:00)</td> <td>Total: 7(00:00)</td> <td>Visit Duration:</td> </tr> <tr> <td><input checked="" type="checkbox"/> Timesheet Required</td> <td><input checked="" type="checkbox"/> Timesheet Approved</td> <td colspan="2">Upload Scanned Timesheet:  </td> </tr> </table> <p style="text-align: center;"><b>Timesheet Approved</b></p>	Duty Sheet POC: 0(00:00)	Others: 7(00:00)	Total: 7(00:00)	Visit Duration:	<input checked="" type="checkbox"/> Timesheet Required	<input checked="" type="checkbox"/> Timesheet Approved	Upload Scanned Timesheet:  							
Duty Sheet POC: 0(00:00)	Others: 7(00:00)	Total: 7(00:00)	Visit Duration:												
<input checked="" type="checkbox"/> Timesheet Required	<input checked="" type="checkbox"/> Timesheet Approved	Upload Scanned Timesheet:  													
4	<p>The system provides a link to upload a scanned copy of the Timesheet. This is optional to validate the visit and remove the hold.</p> <p><b>Note:</b> <i>Ensure to follow all internal policies when marking visits as Timesheet Approved.</i></p>														
4	Click <b>Save</b> to finalize.														
5	Confirm the visit, if/as needed.														

## Unbalanced Visit

An **Unbalanced Visit** occurs when an EVV confirmation for a visit falls outside the specified tolerance range. The following provides steps on how to set and fix this validation.

For example, a Caregiver clocks in for a visit scheduled for 0800-1200 at 0845. The **Unbalanced Tolerance** is set for 30 minutes (configured by the Payer).

With an **Unbalanced Tolerance** of 30 minutes, EVV confirmations must be made *within 30 minutes* of the scheduled Start and End Time. In this case, the Clock-In time (0845) breaches this validation.

Step	Action
1	Navigate to <b>Visit &gt; Visit Search</b> to locate and select the visit held on the Prebilling page.
2	Once located, click the edit icon as indicated on the image. <div style="text-align: center;">  </div> <p style="text-align: center;">Visit held at Prebilling: Unbalanced</p>
3	Adjust the <b>Schedule Time</b> to match the <b>Visit Confirmed Time</b> . <div style="text-align: center;">  </div> <p style="text-align: center;">Adjusted Schedule Time</p>