Billing Review Problems and Resolutions Job Aid

Resolving Billing Review Issues

Problem	Resolution
• Missing Patient Name • Missing Patient Address • Missing Patient City • Missing Patient State • Missing Patient Zip Code • Missing Patient Date of Birth • Missing Patient Gender • Missing Patient SNN • Medicaid Number must be 8 characters • Missing Patient MR number (appears as Patient ID)	1. Navigate to ***Patient > Patient Search*** to locate and select the Patient. 2. In the Patient Profile, select the Profile from the Index. 3. Click the ***Edit*** button. 4. Enter values for the missing Patient information in the appropriate field(s). 5. Click ***Save***.
• Alt Patient Number should not be blank • Alt Patient ID must be of 11 characters • Missing contract start date	1. Navigate to ***Patient > Patient Search*** to locate and select the Patient. 2. In the Patient Profile, select Contract from the Index. 3. Click the Edit link in either the **Alt Patient ID** or **Service Start Date** column. 4. Enter a value for the **Alt Patient ID** and/or the Contract **Start Date**.
• Missing Primary Diagnosis	1. Navigate to ***Patient > Patient Search*** to locate and select the Patient. 2. In the Patient Profile, select MD Order from in the Index. 3. Click the ***Add*** button to enter a new MD Order, or the MD Order ID link to edit an existing one. 4. In *Section 11* (Primary Dx), click on the ***Add*** button to enter the Patient's diagnosis.
• Missing Authorization Number	1. Navigate to Patient > Patient Search to locates and select the Patient. 2. In the Patient Profile, select Authorization/Orders from the Index. 3. Click the Add button to enter a new Authorization OR click the Edit link to update an existing one.

Problem	Resolution
• Visit Start/End Time cannot be blank • Missing Service Code • Visit cannot have TEMP Authorization • Missing Caregiver Name • Scheduled hours exceed Authorization • Schedule Duration does not match Authorized Hours • Billing by Export Code Greater than 24 hours • Maximum hours should not exceed the limit specified	1. Navigate to ***Visit > Visit Search***. 2. Use the search filters to locate the visit with missing/incorrect information. 3. Click on the Edit "" icon to open the visit window. 4. Navigate to the appropriate tab and fix/enter the required information. 5. Click ***Save***.
• Missing Export Code • Missing Revenue Code • Missing Taxonomy Code	1. Navigate to ***Admin > Reference Table Management***. 2. Select *Contract Service Code* from the **Reference Table** dropdown. 3. Locate and select the appropriate **Service Code**. 4. Enter the respective value for the **Export**, **Revenue, or Taxonomy Code** fields**.** 5. Click ***Save***.
• Invalid CNR Import Reference Number	1. Navigate to ***Patient > Patient Search*** to locate and select the Patient. 2. In the Patient Profile, select <u>Calendar</u> from the Index. 3. Select the appropriate visit on the Calendar and click the <u>V:</u> link to access the visit. 4. On the *Schedule Tab*, enter or correct the value for the **CNR Import Reference Number**.
• Missing Caregiver NPI Number	1. Navigate to ***Caregiver > Caregiver Search*** to locate and select the Caregiver. 2. In the Caregiver Profile, select <u>Compliance</u> from the Index. 3. Enter the Caregiver's **NPI Number**.
• Missing CNR Employee Number	1. Navigate to ***Caregiver > Caregiver Search*** to locate and select the Caregiver. 2. In the Caregiver Profile, select <u>Others</u> from the Index. 3. Enter a value for the Caregiver **CNR Number**.
• Missing Physician NPI Number	1. Navigate to A***dmin > Physician > Physician Setup*** and to locate and select the Physician. 2. Enter the Physician's **NPI Number**.

Problem	Resolution
• Pending Billing of Additional Shifts on Same Day	1. Navigate to ***Action > Confirm Visits***. 2. Use the search filters to locate additional visits on the date in question. 3. Confirm any applicable visits and click the Save link for each one.
• Visits on Same Day/Service Code must be Billed on same Invoice	**Option 1 (Merge Invoice)** 1. Navigate to ***Billing > Invoice Search > By Visit***. 2. Use the search filters to locate the visits in question. 3. Review the visits to verify that they were billed on the same day and have the same **Service Code**. 4. Once you confirm, select the checkbox on the lefthand side and the click on "Merge Invoices" **Option 2 (Delete Invoice)** 1. Navigate to ***Billing > Invoice Search > By Invoice***. 2. Use the search filters to locate the Invoice in question. 3. In the Invoice, review the visits to verify that they were billed on the same day and have the same Service Code. 4. To remove visits from the Invoice, click the delete "" icon. 5. Click the Patient Name link of the visit to edit the Service Code. This routes to the Patient Calendar. Select the appropriate visit and edit the Service Code. ***Note:*** *Additional steps may be required if visits are exported or paid.*
• Visit should NOT be placed on Manual Hold	1. Navigate to ***Billing > Invoice Search > By Visit***. 2. Use the search filters to locate visit date in question. 3. Click the Y link from the **E-billing manual Hold** column. 4. Select *Single Claim* from the menu. 5. Click ***OK***.
• Does NOT meet POC Compliance Requirements	1. Review the Contract's Required Compliance rules. 2. Click on the Edit "" icon to open the visit window. 3. Navigate to the *Visit Info* tab. 4. Manually enter the Duties to satisfy the Required Compliance rule. 5. Click ***Save***.

Problem	Resolution
• Review Contract Start Date and Alt Patient Number • Missing Contract Start Date • Discharge Date Elapsed	1. Navigate to ***Patient > Contract***. 2. Review the Contract's **Alt Patient ID**. Click on the Edit link and enter the **Alt Patient ID** in the text window. (Contact the Payer if the field is unavailable to edit.) 3. Click the Update link. 4. Review the **Service Start Date**. Click on the date link to edit on the pop-up window. 5. Click ***Save***.
• Dx Code May Fail Specificity Guidelines (if configured to validate for Flag 10 ICD Codes)	1. Navigate to ***Patient > Authorizations/Orders***. 2. Click on the Edit link to open the Patient Authorization window. 3. Click on the ***Add*** button in the Billing Diagnosis Code(s) section. 4. On the Authorization Default DX Code pop-up, click the **?** (to the right of the **ICD** field) to search for the diagnosis. 5. Click on the most specific ICD code that applies to the Patient (without a Flag code). 6. Click ***Save*** to apply the ICD Code to the authorization.