NEXTSTEP
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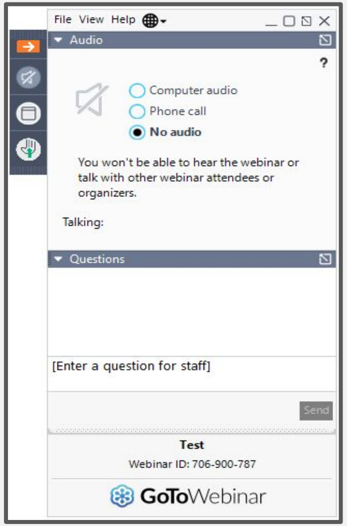
Clean Claims: Preparation Before Submission

Kim Gingras

Behavioral Health Training Supervisor

Housekeeping

- All attendees will be muted.
- Please enter your questions into the Questions box in the Go To Webinar control panel.



Objectives

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During this session we will learn:

- The importance of Clean Claims submission
- Leveraging Eligibility and update Insurance if applicable
- Optimize Revenue with the Billing Services Dynamic
- Scrub and Post Electronic Charges
- Resolve Billing Status Errors
- Successfully Submit Clean Claims

Do you currently have a Clean Claim Submission process in your Agency?

Why prepare for clean claims?

NEXTSTEP
CONTINUING EDUCATION SERIES

1. Avoid rejections and denials
2. Ensure timely filing
3. Reduce days in A/R
4. Receive quick payment adjudications

What is your Agency's Clean Claim Rate?

NEXTSTEP
CONTINUING EDUCATION SERIES

Industry Standard for Clean Claim Rate

Clean Claim Rate

- Recommended Frequency: Daily

Let's Do The Math

Number of Clean Claims / Total Number of Claims Submitted = % Clean Claims

NextStep Tools

Eligibility

NEXTSTEP
CONTINUING EDUCATION SERIES

Importance of Checking Eligibility:

Eligibility inquiries allow agencies to verify a customer's insurance coverage information and receive a real-time response from the payer.

Verification information may include:

1. Copay
2. Coinsurance
3. Deductible
4. Annual limits

Eligibility Caveats

NEXTSTEP
CONTINUING EDUCATION SERIES

- Contracted with Trizetto
- Payer's enrollment must be completed
- NextStep Setup: Eligibility Maintain Users setup
- Eligibility has been set up with agency's preferred methods

Eligibility Methods

NEXTSTEP
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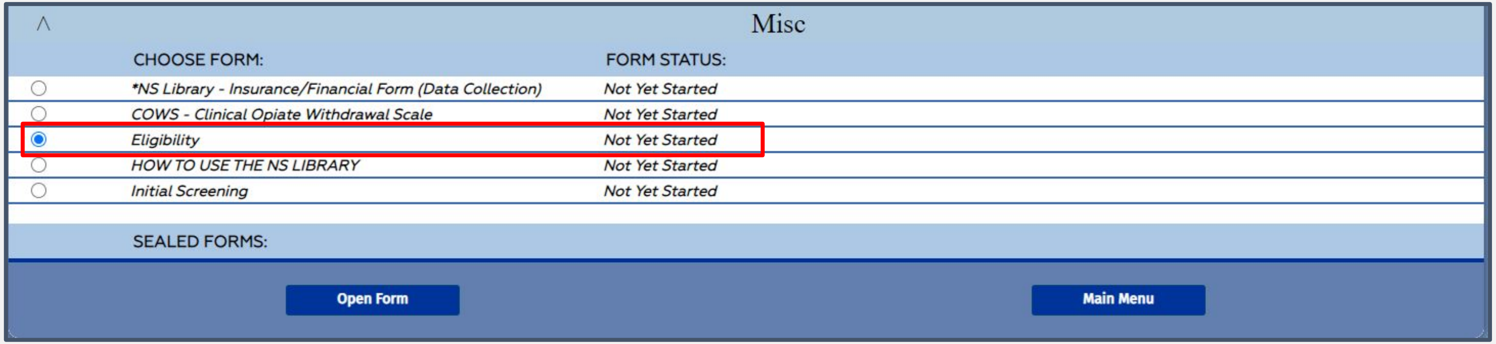
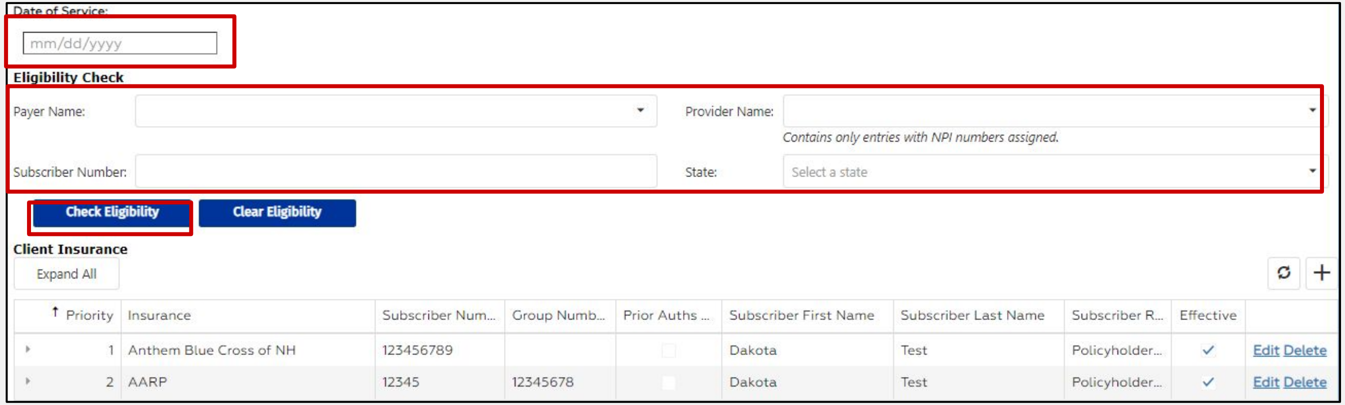


Forms:

- Select the Form
- Enter info for all fields
- Click **Check Eligibility** button



Batch Eligibility

NEXTSTEP
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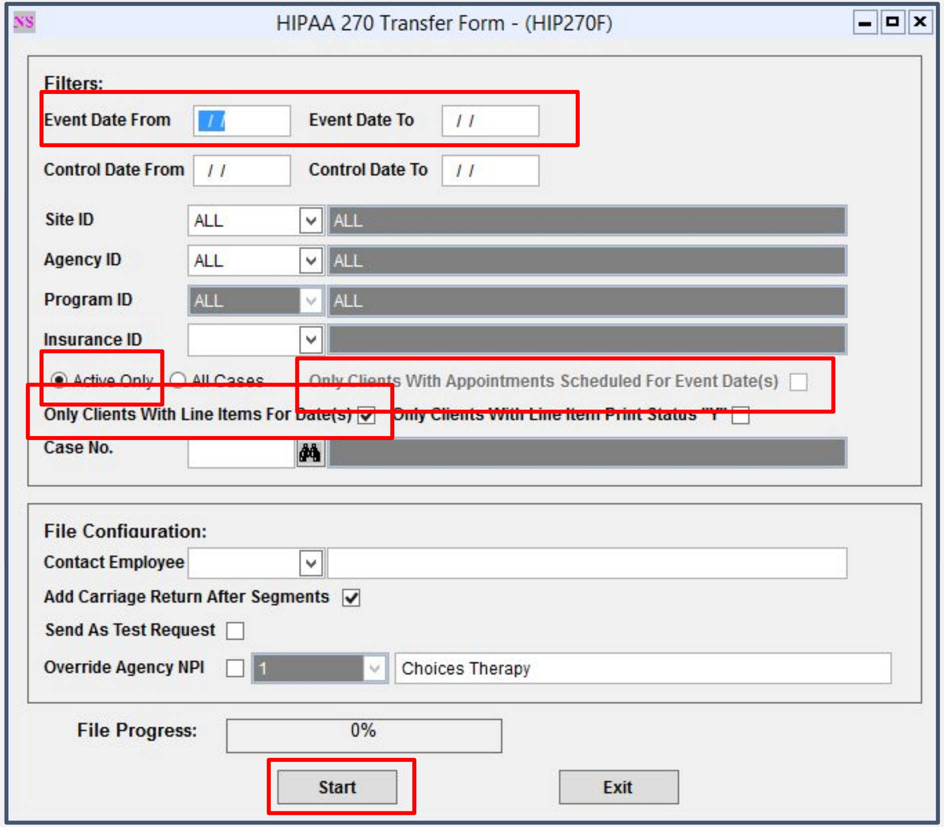
- Event Date: Date of Service
- Active Only
- Deselect “Only Clients with Line Items for Date” checkbox
- “Only Clients with Appointments Scheduled for Event Dates”



Eligibility Results

NEXTSTEP
NG EDUCATION SERIES

Real-time Eligibility Verification

MATTHEW [redacted] (Substance Abuse) **This is the primary insurance*

In Plan Network

Effective from: 01/01/2017		
Individual Deductible:	$650.00	(met: $0.00 / remaining: $650.00)
Co-Insurance (Insurance/Individual):	85%/15%	
Individual Out of Pocket (Stop Loss):	$2,350.00	(met: $20.00 / remaining: $2,330.00)
Family Out of Pocket (Stop Loss):	$4,700.00	(met: $20.00 / remaining: $4,680.00)

Messages:

Co-Insurance:	ALCOHOL AND SUBSTANCE ABUSE REHAB MENTAL HEALTH SUB ABUSE TREATMENT INPATIENT FACILITY SUB ABUSE

Out of Plan-Network

Effective from: 01/01/2017		
Individual Deductible:	$1,300.00	(met: $1,300.00 / remaining: $0.00)
Co-Insurance (Insurance/Individual):	50%/50%	
Individual Out of Pocket (Stop Loss):	$5,350.00	(met: $5,342.00 / remaining: $8.00)
Family Out of Pocket (Stop Loss):	$10,700.00	(met: $5,342.00 / remaining: $5,358.00)

Messages:

Co-Insurance:	ALCOHOL AND SUBSTANCE ABUSE REHAB MENTAL HEALTH SUB ABUSE TREATMENT INPATIENT FACILITY SUB ABUSE
Limitations:	ALCOHOL AND SUBSTANCE ABUSE REHAB MENTAL HEALTH SUB ABUSE TREATMENT INPATIENT FACILITY SUB ABUSE

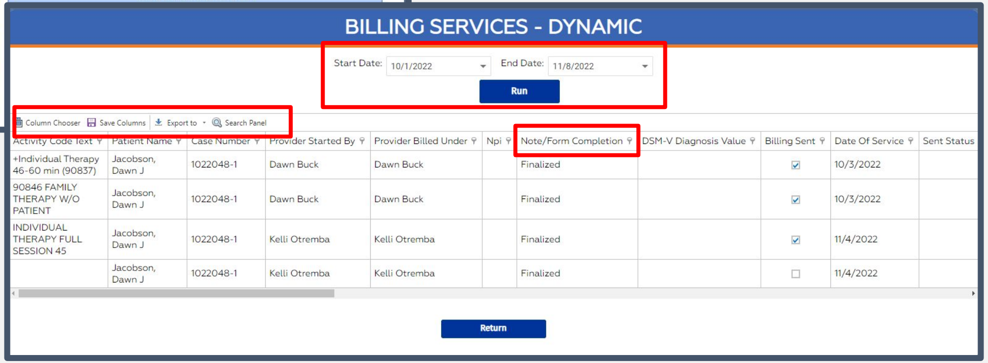
Billing Services Dynamics Purpose

1. Provides a list of services from Forms & Notes
2. Allows users to easily see finalized and unfinalized Forms/Notes
3. Insight into Revenue not captured

Billing Services Dynamic

NEXTSTEP
CONTINUING EDUCATION SERIES

Path: Main Menu > Reports Category > Administrative Reports

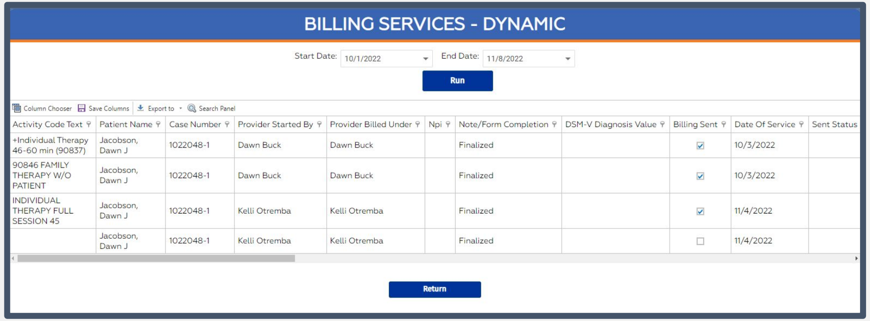


Tips:

1. Run report daily
2. Customize Columns View
3. Analyze Trends

Billing Services Dynamics

NEXTSTEP
CONTINUING EDUCATION SERIES



BILLING SERVICES - DYNAMIC

Start Date: 10/1/2022 End Date: 11/8/2022

Run

Column Chooser Save Columns Export to Search Panel

Activity Code Text	Patient Name	Case Number	Provider Started By	Provider Billed Under	Npi	Note/Form Completion	DSM-V Diagnosis Value	Billing Sent	Date Of Service	Sent Status
+Individual Therapy 46-60 min (90837)	Jacobson, Dawn J	1022048-1	Dawn Buck	Dawn Buck		Finalized		☑	10/3/2022	
90846 FAMILY THERAPY W/O PATIENT	Jacobson, Dawn J	1022048-1	Dawn Buck	Dawn Buck		Finalized		☑	10/3/2022	
INDIVIDUAL THERAPY FULL SESSION 45	Jacobson, Dawn J	1022048-1	Kelli Otremba	Kelli Otremba		Finalized		☑	11/4/2022	
	Jacobson, Dawn J	1022048-1	Kelli Otremba	Kelli Otremba		Finalized		☐	11/4/2022	

Return

Note/Form Status

1. Draft
2. Finalized
3. Finalized

Billing Sent

1. Unchecked
2. Unchecked
3. Checked

Results

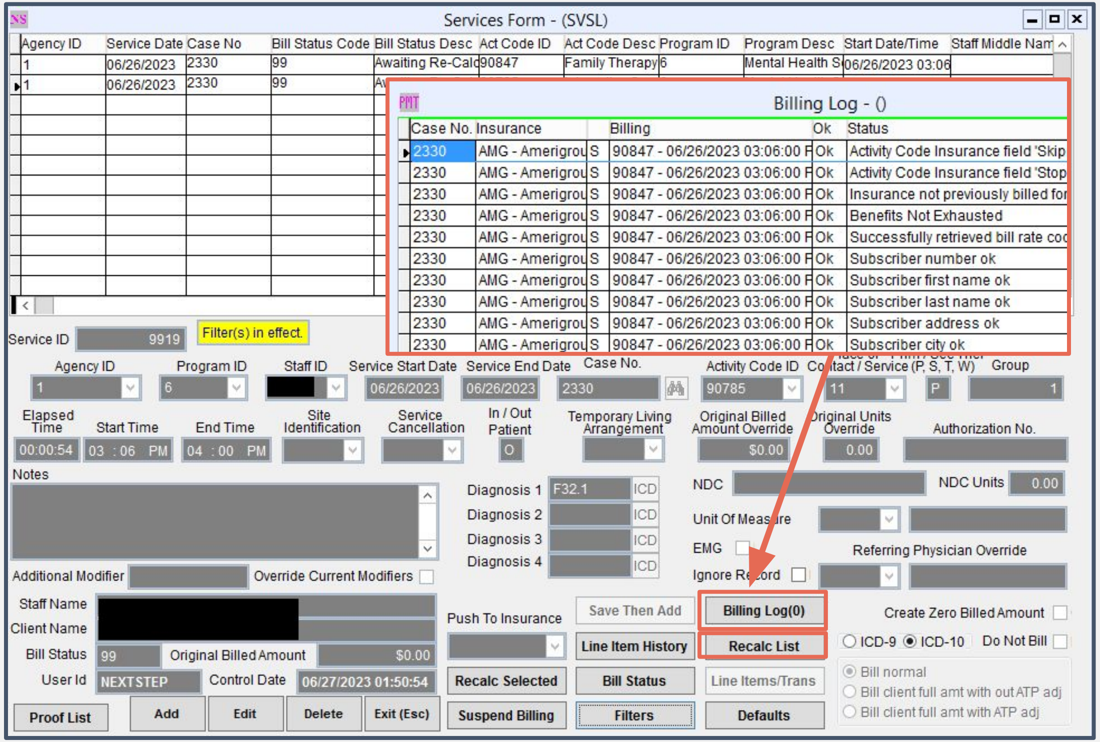
1 No Billing will be processed to Billing Module
2. No Billing will be processed to Billing Module
3. Billing info will process to Billing Module

Scrub Services for Internal Errors

NEXTSTEP
CONTINUING EDUCATION SERIES

Helpful Tips:

1. Organize Visible Columns on Service Form
2. Process Clinical Services daily
3. Scrub with Recalc Button
4. Leverage [Bill Status Code and Resolutions]() resource



Action Items:

1. Assess top bill status errors to identify areas for improvements
2. Develop a communication plan to resolve issues

Scrub Claims for Coding

Path: File > Billing > Line Items

Service Lines

- vs -

Line Items

Service lines Info

- Service providers, Activity codes, DSM-5, Place of Service
- Does **not** contain Activity Code Billing Info
  - Billing Rates
  - Overrides created for Activity Codes
  - Insurance information
- No linked CPT Procedure codes info

Line Items Info

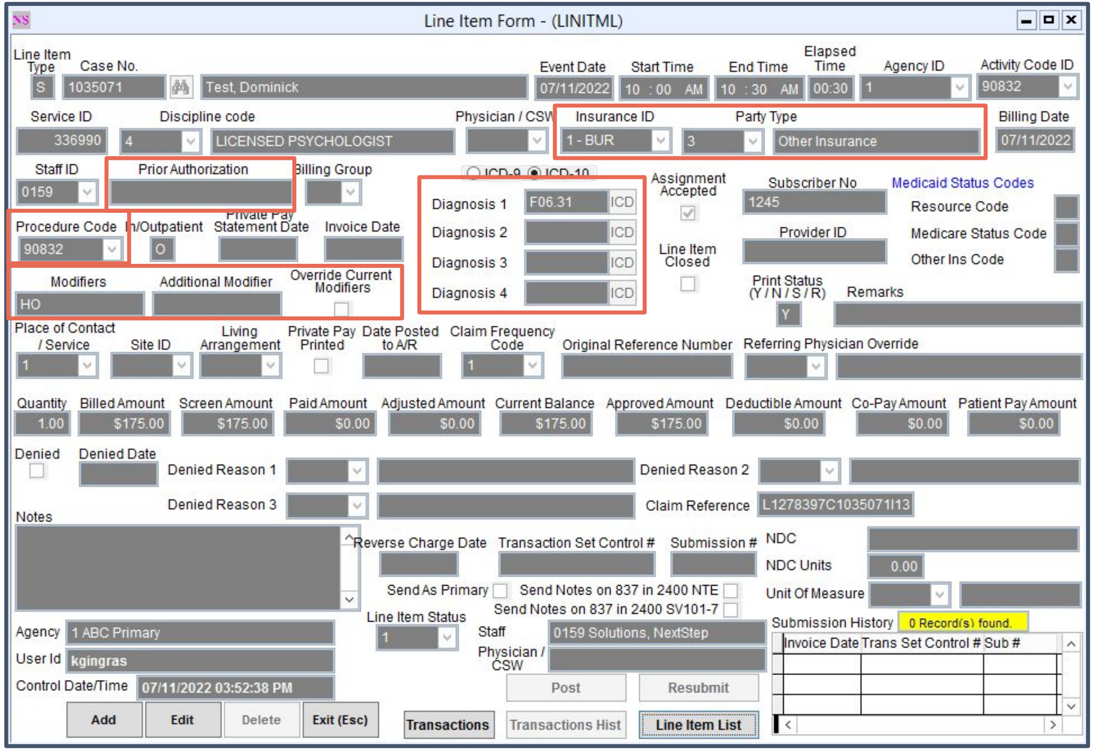
- Contains billing information
  - Insurance info, Activity codes, Linked Procedure codes, DSM-5, Modifiers, Billing rate
- Able to see payments info from payers & patient
- Able to review claim rejections/denials.
- Able to modify/perform corrected claims

Scrub Claims for Coding

NEXTSTEP
CONTINUING EDUCATION SERIES

What do I Review?

- Applicable Insurance Info
- Prior Authorization Info
- Verify Procedure code
- Diagnosis
- Add/Remove Modifiers



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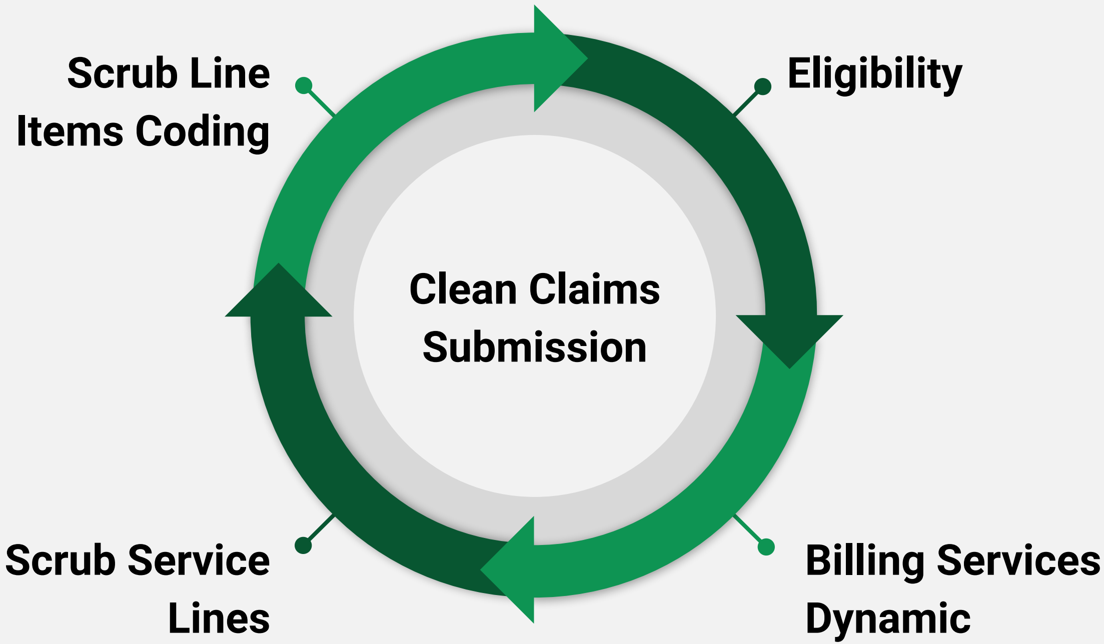
Process

NEXTSTEP
CONTINUING EDUCATION SERIES



NEXTSTEP
CONTINUING EDUCATION SERIES

Claims Submission Best Practice

Transmission

Batch file for each Format Type daily

Invoice Date

Update Print Status after each transmission

CH Collaboration

Work in conjunction with your Clearinghouse to identify rejected claims quickly

NEXTSTEP
CONTINUING EDUCATION SERIES

Action Plan

Action

Leverage the Billing Services Dynamic Report to identify uncaptured/unsent billing service activities.

Solution

Review with rendering clinicians/providers to complete and finalize.

Action

Utilize the Resolution Resource to work through Bill Status Code Errors

Solution

Identify Trends - setup errors, staff entry, missing information

Action

Review Line Items for proper coding.

Solution

Prevents rejections or reduced adjudication reimbursements

Conclusion

NEXTSTEP
CONTINUING EDUCATION SERIES

1. By utilizing Eligibility we are informed if client has active coverage w/ a policy.
2. Processing the Billing Services Dynamics on a regular schedule will allow your practice to recognize and take actions on Forms/Notes that have not been finalized, therefore, not leaving revenue on the table.
3. Working Bill Status codes and reviewing line items will ensure accurate codings are on claim lines prior to submission.
4. Acquired workflow tools to improve clean claims submission to reduce rejections, denials, timely filing, and continued cash flow in your practice.

NEXTSTEP
CONTINUING EDUCATION SERIES

THANK YOU

Questions

NEXTSTEP
CONTINUING EDUCATION SERIES

NEXTSTEP
CONTINUING EDUCATION SERIES

Resources

- **Billing Services Dynamics Report**
- **Bill Status Codes and Resolution Help Article**
- **Insurance Eligibility Verification QRG**
- **NextStep Continuing Education Series Help Center Page**

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