

Clean Claims: Preparation Before Submission

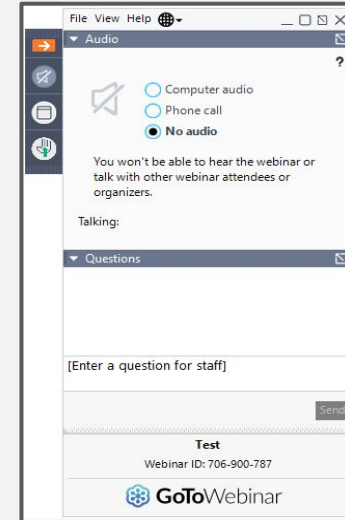
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Housekeeping

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



Objectives

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?

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?

Industry Standard for Clean Claim Rate

95%

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



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



- 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



^ Misc

CHOOSE FORM: FORM STATUS:

<input type="radio"/>	*NS Library - Insurance/Financial Form (Data Collection)	Not Yet Started
<input type="radio"/>	COWS - Clinical Opiate Withdrawal Scale	Not Yet Started
<input checked="" type="radio"/>	Eligibility	Not Yet Started
<input type="radio"/>	HOW TO USE THE NS LIBRARY	Not Yet Started
<input type="radio"/>	Initial Screening	Not Yet Started

SEALED FORMS:

[Open Form](#) [Main Menu](#)

Forms:

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

Date of Service:

Eligibility Check

Payer Name: Provider Name:
Contains only entries with NPI numbers assigned.

Subscriber Number: State:

[Check Eligibility](#) [Clear Eligibility](#)

Client Insurance

Expand All

↑ Priority	Insurance	Subscriber Num...	Group Num...	Prior Auths ...	Subscriber First Name	Subscriber Last Name	Subscriber R...	Effective	
▶ 1	Anthem Blue Cross of NH	123456789		<input type="checkbox"/>	Dakota	Test	Policyholder...	✓	Edit Delete
▶ 2	AARP	12345	12345678	<input type="checkbox"/>	Dakota	Test	Policyholder...	✓	Edit Delete

Batch Eligibility

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

HIPAA 270 Transfer Form - (HIP270F)

Filters:

Event Date From Event Date To

Control Date From Control Date To

Site ID ALL

Agency ID ALL

Program ID ALL

Insurance ID

Active Only All Cases

Only Clients With Appointments Scheduled For Event Date(s)

Only Clients With Line Items For Date(s) Only Clients With Line Item Print Status = "Y"

Case No.

File Configuration:

Contact Employee

Add Carriage Return After Segments

Send As Test Request

Override Agency NPI 1

File Progress:

Eligibility Results

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



Path: Main Menu > Reports Category > Administrative Reports

ADMINISTRATIVE REPORTS

CLINICAL/TREATMENT

- INTERVENTIONS REPORT
- INTERVENTION OVERVIEW
- TRANSFER/DISCHARGE
- KEY INDICATORS DASHBOARD
- LOGITUDINAL CHART REVIEW
- ACTIVE CLIENTS WITHOUT A TREATMENT PLAN

BILLING/FINANCIAL

- BILLING SERVICES
- OPEN BALANCES OWED - SELF PAY
- SENT CLAIMS BY AGENCY IN REAL TIME
- HOURS OF SERVICE PER CLIENT - RESIDENTIAL
- CLIENT HOURS OF SERVICE - NON-RESIDENTIAL
- BILLING SERVICES DYNAMIC**
- SENT CLAIMS BY PAYER
- SENT CLAIMS IN REAL TIME
- PAYMENT DETAILS REPORT
- LINE ITEM AR REPORT
- BILLING CONFLICTS

BILLING SERVICES - DYNAMIC

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

Run

Column Chooser Save Columns Export to Search Panel

Activity Code	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
4-Individual Therapy 46-60 min (90837)	Jacobson, Dawn J	1022048-1	Dawn Buck	Dawn Buck		Finalized		<input checked="" type="checkbox"/>	10/3/2022	
90846 FAMILY THERAPY W/O PATIENT	Jacobson, Dawn J	1022048-1	Dawn Buck	Dawn Buck		Finalized		<input checked="" type="checkbox"/>	10/3/2022	
INDIVIDUAL THERAPY FULL SESSION 45	Jacobson, Dawn J	1022048-1	Kelli Otremba	Kelli Otremba		Finalized		<input checked="" type="checkbox"/>	11/4/2022	
	Jacobson, Dawn J	1022048-1	Kelli Otremba	Kelli Otremba		Finalized		<input type="checkbox"/>	11/4/2022	

Return

Tips:

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

Billing Services Dynamics

BILLING SERVICES - DYNAMIC

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

Run

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		<input checked="" type="checkbox"/>	10/3/2022	
90846 FAMILY THERAPY W/O PATIENT	Jacobson, Dawn J	1022048-1	Dawn Buck	Dawn Buck		Finalized		<input checked="" type="checkbox"/>	10/3/2022	
INDIVIDUAL THERAPY FULL SESSION 45	Jacobson, Dawn J	1022048-1	Kelli Otremba	Kelli Otremba		Finalized		<input checked="" type="checkbox"/>	11/4/2022	
	Jacobson, Dawn J	1022048-1	Kelli Otremba	Kelli Otremba		Finalized		<input type="checkbox"/>	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



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

Services Form - (SVSL)

Agency ID	Service Date	Case No	Bill Status Code	Bill Status Desc	Act Code ID	Act Code Desc	Program ID	Program Desc	Start Date/Time	Staff Middle Name
1	06/26/2023	2330	99	Awaiting Re-Calc	90847	Family Therapy	6	Mental Health S	06/26/2023 03:06	

Billing Log - (0)						
Case No.	Insurance	Billing	Ok	Status		
2330	AMG - Amerigrou	S	90847 - 06/26/2023 03:06:00	F	Ok	Activity Code Insurance field 'Skip
2330	AMG - Amerigrou	S	90847 - 06/26/2023 03:06:00	F	Ok	Activity Code Insurance field 'Stop
2330	AMG - Amerigrou	S	90847 - 06/26/2023 03:06:00	F	Ok	Insurance not previously billed for
2330	AMG - Amerigrou	S	90847 - 06/26/2023 03:06:00	F	Ok	Benefits Not Exhausted
2330	AMG - Amerigrou	S	90847 - 06/26/2023 03:06:00	F	Ok	Successfully retrieved bill rate cod
2330	AMG - Amerigrou	S	90847 - 06/26/2023 03:06:00	F	Ok	Subscriber number ok
2330	AMG - Amerigrou	S	90847 - 06/26/2023 03:06:00	F	Ok	Subscriber first name ok
2330	AMG - Amerigrou	S	90847 - 06/26/2023 03:06:00	F	Ok	Subscriber last name ok
2330	AMG - Amerigrou	S	90847 - 06/26/2023 03:06:00	F	Ok	Subscriber address ok
2330	AMG - Amerigrou	S	90847 - 06/26/2023 03:06:00	F	Ok	Subscriber city ok

Service ID: 9919 Filter(s) in effect.

Agency ID: 1, Program ID: 6, Staff ID: [Redacted], Service Start Date: 06/26/2023, Service End Date: 06/26/2023, Case No.: 2330, Activity Code ID: 90785, Contact / Service (P, S, T, W): 11, P, Group: 1

Elapsed Time: 00:00:54, Start Time: 03:06 PM, End Time: 04:00 PM, Site Identification: [Redacted], Service Cancellation: [Redacted], In / Out Patient: O, Temporary Living Arrangement: [Redacted], Original Billed Amount Override: \$0.00, Original Units Override: 0.00, Authorization No.: [Redacted]

Notes: [Redacted]

Diagnosis 1: F32.1 ICD, Diagnosis 2: [Redacted] ICD, Diagnosis 3: [Redacted] ICD, Diagnosis 4: [Redacted] ICD

Additional Modifier: [Redacted], Override Current Modifiers:

Staff Name: [Redacted], Client Name: [Redacted], Bill Status: 99, Original Billed Amount: \$0.00, User Id: NEXTSTEP, Control Date: 06/27/2023 01:50:54

Buttons: Proof List, Add, Edit, Delete, Exit (Esc), Suspend Billing, Filters, Defaults, Recalc Selected, Bill Status, Line Items/Trans, Recalc List, Billing Log(0), Push To Insurance, Save Then Add, Line Item History, Ignore Record, Referring Physician Override, Create Zero Billed Amount, ICD-9, ICD-10, Do Not Bill, Bill normal, Bill client full amt with out ATP adj, Bill client full amt with ATP adj

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

What do I Review?

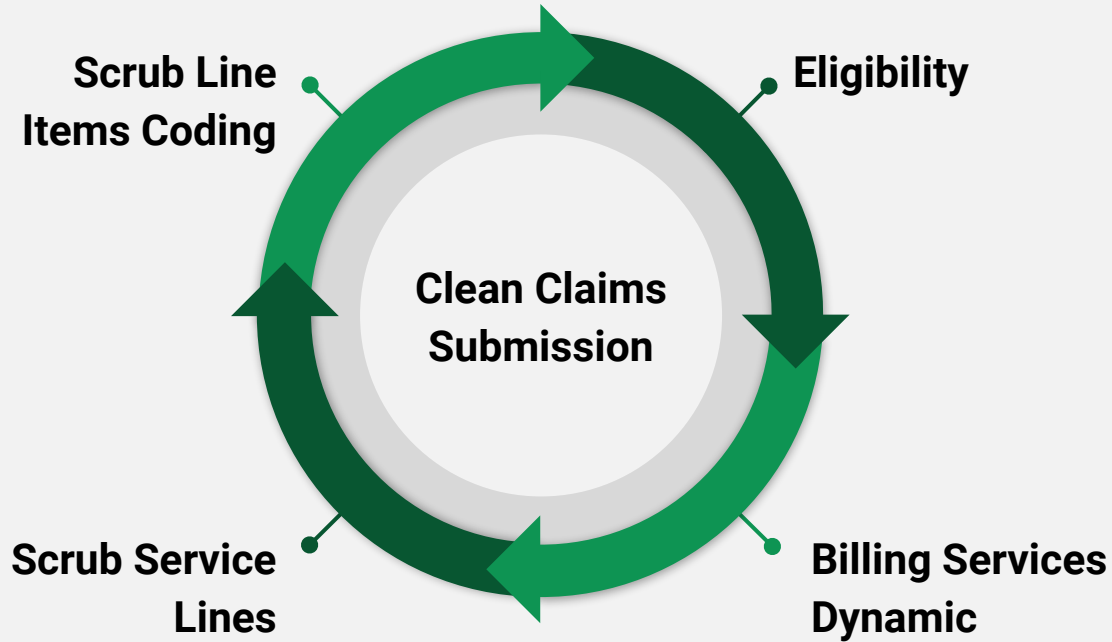
- Applicable Insurance Info
- Prior Authorization Info
- Verify Procedure code
- Diagnosis
- Add/Remove Modifiers



Line Item Form - (LINITML)

Line Item Type	Case No.	Event Date	Start Time	End Time	Elapsed Time	Agency ID	Activity Code ID		
S	1035071	07/11/2022	10 :00 AM	10 :30 AM	00:30	1	90832		
Service ID	Discipline code	Physician / CSW	Insurance ID	Party Type	Billing Date				
336990	4	LICENSED PSYCHOLOGIST	1 - BUR	3	Other Insurance	07/11/2022			
Staff ID	Prior Authorization	Billing Group			Assignment Accepted	Subscriber No	Medicaid Status Codes		
0159					<input checked="" type="checkbox"/>	1245	Resource Code		
Procedure Code	In/Outpatient	Statement Date	Invoice Date	Diagnosis 1	Diagnosis 2	Diagnosis 3	Diagnosis 4		
90832	O			F06.31	ICD	ICD	ICD		
Modifiers	Additional Modifier	Override Current Modifiers			Line Item Closed	Provider ID	Medicare Status Code		
HO					<input type="checkbox"/>	Other Ins Code			
Place of Contact / Service	Site ID	Living Arrangement	Private Pay Printed	Date Posted to A/R	Claim Frequency Code	Original Reference Number	Referring Physician Override		
1					1				
Quantity	Billed Amount	Screen Amount	Paid Amount	Adjusted Amount	Current Balance	Approved Amount	Deductible Amount	Co-Pay Amount	Patient Pay Amount
1.00	\$175.00	\$175.00	\$0.00	\$0.00	\$175.00	\$175.00	\$0.00	\$0.00	\$0.00
Denied	Denied Date	Denied Reason 1	Denied Reason 2	Denied Reason 3	Claim Reference				
<input type="checkbox"/>					L1278397C1035071113				
Notes	Reverse Charge Date	Transaction Set Control #	Submission #	NDC	NDC Units	Unit Of Measure			
					0.00				
Agency	User Id	Control Date/Time	Line Item Status	Staff	Physician / CSW	Submission History			
1 ABC Primary	kgingras	07/11/2022 03:52:38 PM	1	0159 Solutions, NextStep		0 Record(s) found.			
Add		Edit	Delete	Exit (Esc)	Post	Resubmit			
Transactions		Transactions Hist		Line Item List					

Process



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

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

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



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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