DOEA eCIRTS
Module 4
Cheat Sheet Set-up

This cheat sheet is intended to help the billing specialists set up clients for practice purposes. Generally, other users will complete tasks that are required prior to accounting for billing activities. Such tasks, including creating a client record, ensuring the appropriate assessments have been completed, activating program enrollments, and assigning services, should be complete when billing for services that have been provided to the client. The training environment is not currently set up for billing specialists to pick up an existing client and bill for activities. To practice billing activities, the billing specialists will need to properly set up clients following the steps below.

Create a Client

1. Search for existing client to ensure the client you want to create does not exist.
2. File - Add New Client
3. Complete the Demographics page
    a. Complete all required fields
    b. Complete the address according to the PSA
        i. Street address
        ii. City
        iii. State
        iv. Zip Code
        v. County
        vi. PSA
        vii. Agency Name
    c. File – Save & close
4. Complete the Screening page
    a. Primary worker = Screener (keep as self)
    b. Status = Screening Completed
        i. *This should be the status when you receive the client*
    c. Screening Referral Date = Auto populates (Today)
    d. File – Save & Close

The address is a Smart field. The answers will narrow based on locations. When you get down to the County, PSA, and Agency Name, there should only be one choice.

Referrals, Programs, & Service Records

5. Verify the Agency Referral populated on the Referrals to Providers Tab
    a. Create the Referral record for the Provider
    b. *In production, you will verify the Provider Referral exists.*
        i. File – Add Referral Details
            1. Provider/PSA = Provider
            2. Provider = PSA _ Practice; for example, PSA 10 Practice or PSA 2 Practice
            3. Worker = PSA _ Practice, Worker; for example, PSA 10 Practice, Worker
            4. Status = Referral Not Needed
        ii. File – Save & close
6. Verify DOEA Services Program record exists on the Programs tab
    a. Typically, the ADRC would have added waitlist records on this tab
    b. Typically, the provider would have updated the Program records to an active status

    c. Add Program enrollment records
        i. File – Add Program
            1. Referred from = ARC or ADRC
            2. Program = ADI
            3. Status = Active
            4. Enrollment Provider = Self
                a. Normally, these will be tagged to the generic provider but for practice purposes keep it as self
            5. File – Save & close
        ii. Repeat – File – Add Program
            1. Referred from = ARC or ADRC
            2. Program = OA3B
            3. Status = Active
            4. Enrollment Provider = Self
            5. File – Save & close
        iii. Repeat as desired (optional)
            1. Referred from = ARC or ADRC
            2. Program = CCE
            3. Status = Active
            4. Enrollment Provider = Self
            5. File – Save & Close
7. Service Tab
    a. Create a plan for the services
    b. File – Add Plan
    c. *This should be complete prior to attempting billing. These tasks are normally handled before the billing is expected to occur.*
        i. General Information
            1. Program = DOEA Services
            2. Agency = The PSA associated to the Client
            3. Worker = Keep as self for practice purposes, would typically be the case manager or person recording the services on the client record
            4. Start date = Today
            5. End date = 1 year later
            6. Status = Open
            7. File – Save Plan
        ii. Services Subpage
            1. File – Add Planned Service
            2. *These should be listed on this page prior to billing and are normally documented before the billing specialists would be billing for these activities.*
                a. Funding Source = ADI
                b. Program = ADI
                c. Service code = CHO Chore
                d. Unit Per = 48 (how many)

e. Units of Measure = Quarter (how often)
f. Provider ID = PSA _ Practice (dependent on the client's PSA; for example, if client is associated with PSA 2 the Provider will be PSA 2 Practice)
g. Service Status = Accepted

3. File – Save & Add Planned Service to Repeat
    a. Funding Source = ADI
    b. Program = ADI
    c. Service code = RESP Respite
    d. Unit Type = 48 (how many)
    e. Units of Measure = Quarter (how often)
    f. Provider ID = PSA _ Practice (dependent on the client's PSA; for example, if client is associated with PSA 2 the Provider will be PSA 2 Practice)
    g. Service Status = Accepted
4. File – Save & Add Planned Service to Repeat
    a. Funding Source = ADI
    b. Program = ADI
    c. Service code = TRS Transportation
    d. Unit Type = 48 (how many)
    e. Units of Measure = Quarter (how often)
    f. Provider ID = PSA _ Practice (dependent on the client's PSA; for example, if client is associated with PSA 2 the Provider will be PSA 2 Practice)
    g. Service Status = Accepted

iii. Fie - Save & Close to see List view of services subpage
    1. Check the boxes to the right of the services
    2. File – Create Authorization(s)

iv. File – Close Services

Authorizations

8. Authorizations Tab
    a. Verify the authorizations are in the Approved status

You are now ready to complete the process for Module 4, starting on the activities tab.

STOP

You can only bill for today's activities.

Activities cannot be future billed. For example, if today is the 2nd, I can't bill for the 3rd or 4th.

Back billing is dependent on the open date for the client record. Since you just made this client, you can't bill prior to today.

For training, if you want to bill for more than just today, wait a week and return to the client you created. You can then bill for activities for the week.

Example: Create client on Nov. 1st

Return to client record on Nov. 8th

Can bill for activities Nov. 1 through Nov. 8.