DOEA eCIRTS
Module 4
Billing
Reference Guide

Course Description

This module will demonstrate the various billing methods that can be utilized in eCIRTS. Billing can be conducted in several different ways. Billing can be conducted client-by-client, by service for multiple clients, aggregately, or via an XML uploaded file.

Prerequisites

- Layout and Navigation Video
- Searches Video

Supplemental Resources, Materials, and Credentials

- The Training Manual
- Cliff Notes
- Login credentials for the training environment

Learning Outcomes

1. Add Billable Service for One Client
2. Add Activities for Multiple Clients
3. Add Aggregate Services (Non-Client specific)
4. Import Activities for Multiple Clients

<u>Add Billable Service for One Client</u>

The activity tab on a Client Record is used to bill for individual services for specific clients. The tab can only create one Activity record at a time, for one client at a time.

- Begin on the My Work dashboard
- Utilize the Quick or Advance Search to locate the specific Client
    - Navigate to the Referrals to Providers Tab
        - Ensure the Provider is listed
    - Navigate to the Activities Tab
        - Hover over the File Menu and select Add Activities
            - It is advised to work top down and left to right within the different sections
            - Activity Times Section
                - Record the Start and End Dates
                - Start and End Times are not Required
            - Authorization Section
                - Select Auth ID for the service in which you intend to bill
                - Indicate if it is an exception
            - Activity Details Section
                - Division = Defaults to AG
                - Type = The type of service rendered
                - Agency = Select your Agency
                - Program = Select the Program under which the service is being delivered
                - Service Provider = Auto populates based on the Auth ID that was selected
                - Worker = Defaults to the User (Self)
                - Status = Pending (for now, will need to update when all service details have been entered)
            - Activity Services Section
                - Index/SubObject = Verify the Funding Source and Program combination (Example: GR General Revenue ADI Alzheimer's Disease Initiative)
                - Service = Will auto populate if Auth ID was selected; select service for which you intend to bill
                - Units = Number of units you intend to bill
                - Total Cost = Auto populates when the Service and Units are entered
            - Activity Service Details
                - Unit Cost = Auto Populates
                - Unit Type = Auto Populates
            - Activity Details Sections

- Status = Complete
- Save & Close to finish

<u>Add Activity for Multiple Clients</u>

The Activity Roster is used to bill for the same service, from the same provider, under the same Program for multiple recipients. This feature will save the user time when billing multiple clients for the same Activity.

- Start on My Work dashboard
- Locate the Tasks Queue on the right
    - Expand the My Management Queue
    - Select Activity Roster
        - Begin by Completing the Delivery Grid Filters Section
            - Type of Services = Select the type of service (Example: Authorized)
            - City, County, and Zip Code = Complete only if all fields match for all clients
        - Assign to All Activities Section
            - Worker = Defaults to Self
            - Status = Complete
            - Daily Units = Enter the number of units that will be applied to each client for each day of the month; can be left blank (Example: Daily Units = 2, then 2 units will be applied for each client for Sept. 1, Sept, 2, Sept 3, and so on).
            - Total Units = Enter the total number of units for the month that will be applied to each client; can be left blank (Example: Total units = 20, then 20 units will be applied for each client for the month of Sept.)
            - Batch No. = Auto Populates
        - Filter and Assign to Activities Section
            - Division = Defaults to AG
            - Delivery Month/Year = Defaults to current month, is editable if needed
            - Agency = Select Agency for which you intend to bill
            - Program = Select the Program for which you intend to bill
            - Provider = Select the Provider that rendered the Services
            - Parent Provider = Auto populates once the Service Provider is selected

            - Index/SubObject = Choose the Funding Source and Program combination (Example: GR General Revenue ADI Alzheimer's Disease Initiative)
            - Service = Click ellipsis and select service for which you intend to bill
        - Click “Get Matching Consumers”
            - Add daily units per client
            - Scroll across the screen to view and update daily units
            - Save & Close to finish
- If you frequently use the same filters to create Activity Rosters, then you may want to utilize the Save Search Filter feature at the top of the page. The Save Search Filter feature allows you to execute the same search on subsequent occasions.

<u>Add Aggregate Services</u>

Aggregate Services will be recorded under the Client Groups Chapter. Aggregate Services are activities that are not Client Specific.

- Start on the My Work dashboard
- Navigate to the Client Groups Chapter
    - Search using the filers such as Group Name
    - Select appropriate Client Group (The group in which you intend to bill)
    - Navigate to the Activities Tab
        - Hover over the File button on the Menu bar
        - Select Add Activities
            - Work top down and left to right within the different sections
            - Activity Times
                - Enter Start and end Dates
                - Start and Stop times are not required
            - Activity Details
                - Division = Defaults to AG
                - Type = Defaults to Standard, can be changed if needed
                - PSA = Select the PSA
                - Program = Select the Program being used to bill
                - Service Provider = The Provider that rendered the service
                - Worker = Auto Populates Self, can be changed if needed
                - Status = Pending (for now, will need to be updated once all activity information has been entered)
            - Activity Services
                - Index/SubObject = Choose the Funding Source and Program combination (Example: GR General Revenue ADI Alzheimer's Disease Initiative)

        - Service = The service that was rendered
        - Total Cost = Auto Populates
        - Number of unduplicated clients = Required for LSP
        - Number of Clients Served = The number of clients served
        - Units = The total number of units delivered to the clients within the date range
        - Remaining fields will auto populate
      - Activity Details
        - Update Status
        - Status = Complete
        - Save & Close to finish

<u>Import Activities for Multiple Clients</u>

- Log into eCIRTS
- Begin on the My Work dashboard
- Locate the Tasks Queue on the right
  - Expand the My Files Queue
    - Click Upload
      - The File Upload window displays
      - Provider = Provider that the file is for
      - File Type = Activities Import
      - File = Browse your computer and locate the XML file to upload
      - Click Upload
    - Two potential outcomes
      - A popup will indicate the file successfully imported
        - To view imported activities by client
        - Navigate to the Client's record via a quick or advanced search
          - Navigate to the Activities Tab
          - View the list of Activities
          - Can select specific activity to view more details
      - A popup will indicate the upload failed
        - The popup sometimes will indicate the error. For example, Incorrect File Name or Destination Folder.
        - More in-depth information can be found on the Error Log
        - Accessing the Error Log
          - From My Work Dashboard
            - Locate the Tasks Queue
            - Expand the My Files Queue
              - Click Download

- File Download Window opens
  - Click Plus sign beside Provider to expose subfolders
  - Click the Plus sign for Activity Import Logs to expose subfolders
  - Select the file that failed by clicking the checkbox
  - Expand or Maximize the window to see the Download button
  - Download the error log
  - Review the details
  - Correct the errors
  - Attempt upload again

<u>Corresponding Page numbers of tasks to the Training Manual</u>

Add billable services for one Client...pages 375-377

Add activities for Multiple Clients...pages 377-384

Add Aggregate Services...pages 384-392

Import Activities for Multiple Clients...pages 392-404

Addressing Errors...pages 397-404