

DOEA eCIRTS
Module 4
Billing
Handout

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
- Reference Guide
- 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

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Billing specialists refers to anyone who is responsible for recording and documenting billable activity records.

Scenario 1: Add billable service for one client

Billable services can be recorded client-by-client and service-by-service. To document singular services for individual clients, the billing specialist will locate the client's record, verify the client has an active program record and a referral to their provider. The billing specialist would then add activity records to that client record on the Activity tab. Billing for SCAS Screening and Assessment units is a common example of a billing activity that would occur on the Activity tab of a client record.

Scenario 2: Add billable service for multiple clients

A single service, CHO Chore for example, provided by a single Provider, PSA 5 Practice provider for example, can be billed to multiple clients at once time. The specialist, in this case, would access the Activity Roster from their My Work dashboard. The specialists would complete the required field and obtain a list of clients who match the parameters for billing. The specialist can then assign a specific number of units to each client on the Activity Roster. The roster will create an activity record for each client on the clients' record.

Scenario 3: Billing for aggregate units

Aggregate units are not linked to specified client records and must be billed aggregately. Services, such as legal assistance, are not commonly tied to specific clients and are billed through a client group. The specialist will identify the appropriate client group to bill against and add an activity record. The record will indicate how many clients were served, the total units delivered, and how many units per client.

Scenario 4: Import Activities for multiple clients

Another way to create activity records that are directly tied to specific client records is to import a file. This is commonly known as the EDI Upload of an XML file. Only the users who have been granted permission to upload and download files for the provider will be able to execute this task. The user will access the queue on their My Work dashboard and upload the file.