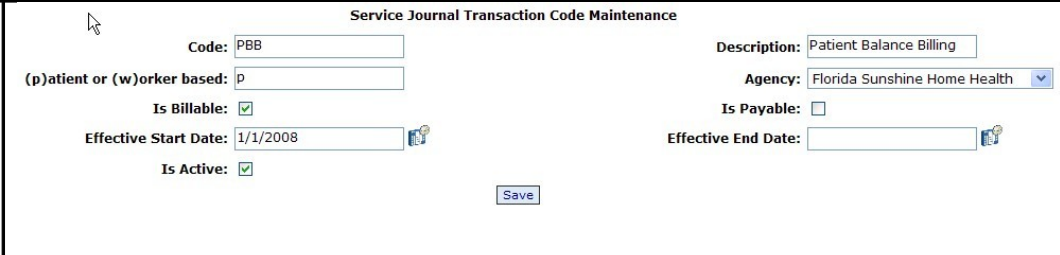
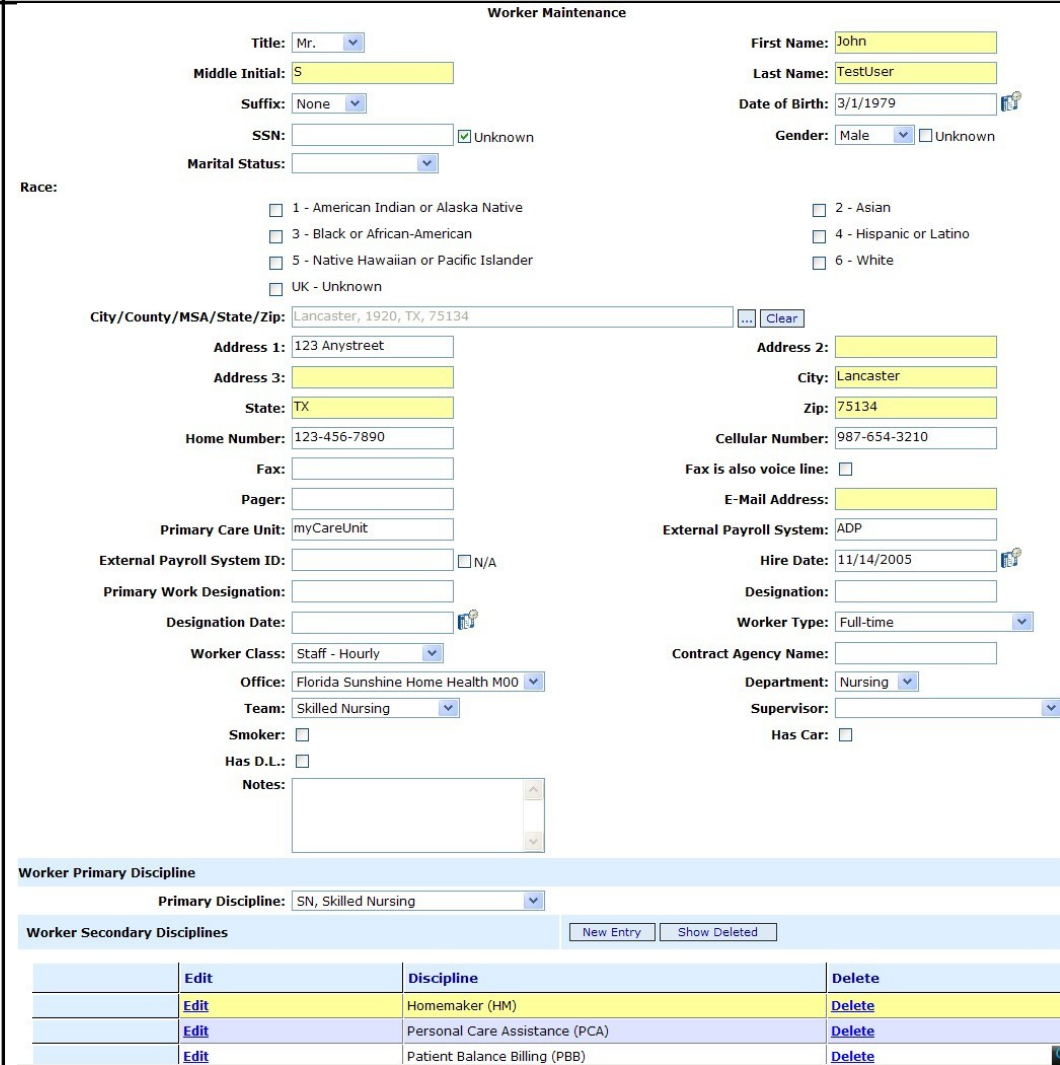
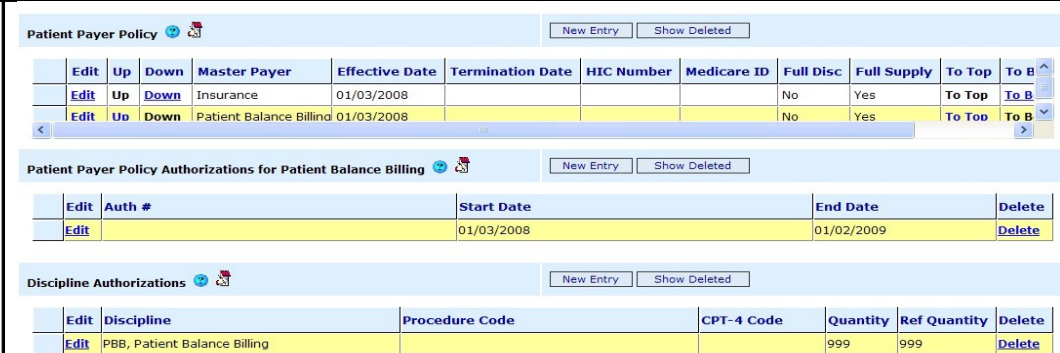
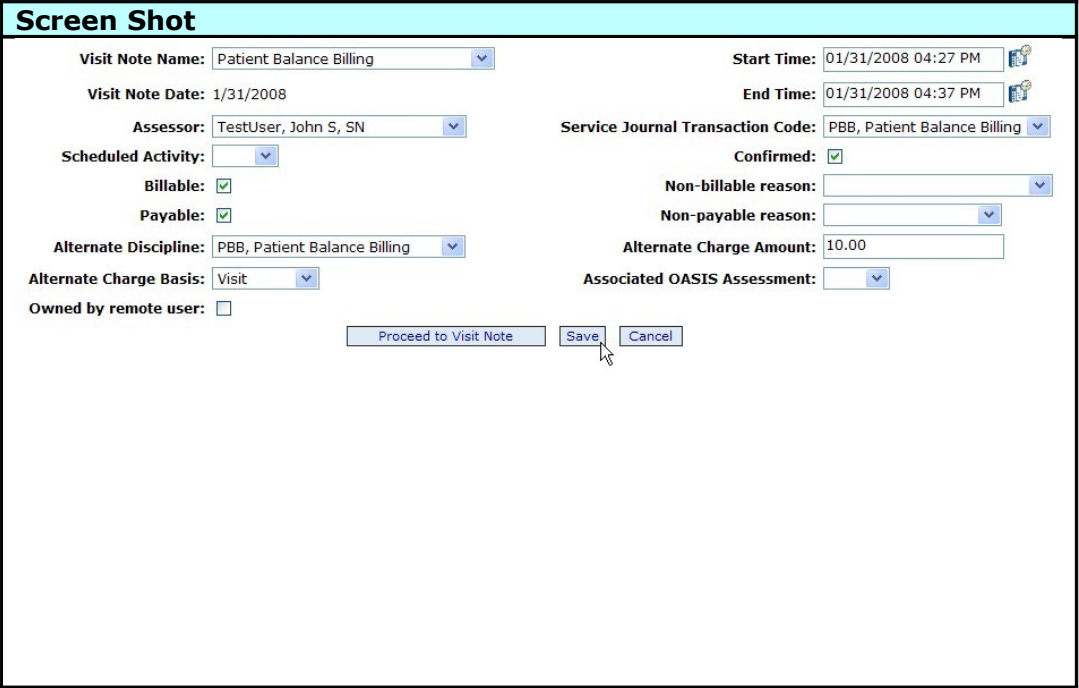



Instructions to generate a private pay invoice for patient balance due

Action / Instruction	Screen Shot												
Scenario: Primary insurance payer has been billed and subsequently paid the claim but a balance remains for the claim. In this example, 'Insurance' payer was invoiced for \$110.00, payment posted for \$100.00, write-off posted for \$10.00 which is remaining balance to then be billed to patient.													
ADMIN module													
1. Create new master payer in ADMIN – Financial Maint – Master Payer – Add New to be used for the patient balance billing	<div>Master Payer Maintenance</div> <div><div><div>Code: <input type="text" value="PBB"/></div><div>Claim Payer Name: <input type="text" value="Patient Blance Billing"/></div><div>Address: <div><div></div><div></div></div></div><div><div>Billing Calendar Cycle, Start Date of First Cycle: <input type="text" value="Monthly, 7/1/2007"/></div><div>Payer NAIC #: <input type="text"/></div><div>Default Billing Output: <input type="text" value="Paper"/></div><div>Claim Form Template - if paper claim: <input type="text" value="Self Pay - Full Fee"/></div><div>Sender ID: <input type="text"/></div><div>Submitter Identifier: <input type="text"/></div><div>Receiver ID: <input type="text"/></div><div>Receiver Primary Identifier: <input type="text"/></div><div>Monitor Plan Of Treatment Status: <input type="checkbox"/></div><div>Billing Provider Secondary ID: <input type="text"/></div><div>Vendor Number: <input type="text" value="1"/></div><div>Payer is "Self Pay": <input checked="" type="checkbox"/></div><div>Acknowledgement Requested (check for yes): <input type="checkbox"/></div><div>Discount Account Number: <input type="text"/></div><div>Payment Adjustment Account Number: <input type="text"/></div><div>Claim Filing Indicator Code: <input type="text" value="MA, Medicare Part A"/></div><div>Use NPI for Agency in Electronic File: <input checked="" type="checkbox"/></div><div>Use HIC# Entered in Patient Demographics: <input type="checkbox"/></div></div><div><div>Master Payer Description: <input type="text" value="Patient Balance Billing"/></div><div>Show Master Payer Address on Paper Forms: <input type="checkbox"/></div><div>This Payer Starts On: <input type="text" value="1/1/2008"/></div><div>Payer NAIC Sub-Code: <input type="text"/></div><div>ACSx12N 837: <input type="text" value="None"/></div><div>Sender Code: <input type="text"/></div><div>Sender ID Qualifier: <input type="text"/></div><div>Receiver Code: <input type="text"/></div><div>Receiver ID Qualifier: <input type="text"/></div><div>Payer Identifier: <input type="text"/></div><div>Provider Number: <input type="text"/></div><div>BCBS Assigned Facility #: <input type="text" value="1"/></div><div>Monitor Supplemental Order Status: <input type="checkbox"/></div><div>Test Claims Usage Indicator: <input type="checkbox"/></div><div>Cash Account Number: <input type="text"/></div><div>Account Recievable Account Number: <input type="text"/></div><div>Supply Account Number: <input type="text" value="1"/></div><div>Group by date and discipline for UB-92 FL42-47: <input type="checkbox"/></div><div>If available, use Physician NPI for claims instead of UPIN: <input checked="" type="checkbox"/></div><div>Use ZZ in place of default HC in SV2 HIPPS code lines: <input type="checkbox"/></div></div><div><div>Save</div></div></div></div>												
2. Create new discipline in ADMIN – Clinical Maint – Discipline – Add New to be used for the patient balance billing	<div>Discipline Maintenance</div> <div><div><div>Code: <input type="text" value="PBB"/></div><div>Discipline Category: <input type="text" value="OTH, Other"/></div><div>CPT-4: <input type="text"/></div><div>Cost per Visit: <input type="text"/></div><div>Discipline to be paid: <input type="checkbox"/></div></div><div><div>Description: <input type="text" value="Patient Balance Billing"/></div><div>Revenue Code: <input type="text" value="0651, RTN HOME, Routine Home Ca"/></div><div>Agency: <input type="text" value="Florida Sunshine Home Health"/></div><div>Discipline to be billed: <input checked="" type="checkbox"/></div><div>Therapy-related: <input type="checkbox"/></div></div><div><div>Save</div></div></div>												
3. Create new charge rate for PBB discipline in ADMIN – Financial Maint – Charge Rate – Add New to be used for the patient balance billing	<div>Charge Rate Maintenance</div> <div><div><div>Discipline: <input type="text" value="PBB, Patient Balance Billing"/></div><div>Effective End Date: <input type="text"/></div><div>Rate Basis: <input type="text" value="Visit"/></div></div><div><div>Effective Start Date: <input type="text" value="1/1/2008"/></div><div>Charge Rate: <input type="text" value="0.01"/></div><div>Agency: <input type="text" value="Florida Sunshine Home Health"/></div></div><div><div>Save</div></div></div>												
4. Create new assessment visit note definition in ADMIN – Assessment Definition – Add to be used for the patient balance billing	<div>Search Assessments:</div> <div><div>Search For: <input type="text" value="balance"/></div><div>Search</div><div>Show All</div><div><input type="checkbox"/> Show deactivated Assessments also</div></div> <div>Search Result:</div> <table><tr><th>Assessment Name</th><th>Assessment Family</th><th>DateEffective</th><th>History</th><th>Report</th><th>Status</th></tr><tr><td>Patient Balance Billing</td><td>VN</td><td>1/1/2000</td><td>View</td><td>View</td><td>Production</td></tr></table>	Assessment Name	Assessment Family	DateEffective	History	Report	Status	Patient Balance Billing	VN	1/1/2000	View	View	Production
Assessment Name	Assessment Family	DateEffective	History	Report	Status								
Patient Balance Billing	VN	1/1/2000	View	View	Production								


Action / Instruction	Screen Shot																																																																			
5. Create new service journal transaction code in ADMIN – Financial Maint – SJ Transaction Code – Add New to be used for the patient balance billing																																																																				
6. Assign the PBB discipline as a supplemental discipline to an office-based worker in ADMIN – Worker Maint - Worker	 <table><tr><th></th><th>Edit</th><th>Discipline</th><th>Delete</th></tr><tr><td></td><td>Edit</td><td>Homemaker (HM)</td><td>Delete</td></tr><tr><td></td><td>Edit</td><td>Personal Care Assistance (PCA)</td><td>Delete</td></tr><tr><td></td><td>Edit</td><td>Patient Balance Billing (PBB)</td><td>Delete</td></tr></table>		Edit	Discipline	Delete		Edit	Homemaker (HM)	Delete		Edit	Personal Care Assistance (PCA)	Delete		Edit	Patient Balance Billing (PBB)	Delete																																																			
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CLINICAL module																																																																				
1. Assign the PPB payer to the patient in CLINICAL – Patient Profile – Demographics – Payer Policy Assignment and the PBB payer should be set to have limited coverage for the PBB discipline only	 <table><tr><th></th><th>Edit</th><th>Up</th><th>Down</th><th>Master Payer</th><th>Effective Date</th><th>Termination Date</th><th>HIC Number</th><th>Medicare ID</th><th>Full Disc</th><th>Full Supply</th><th>To Top</th><th>To B</th></tr><tr><td></td><td>Edit</td><td>Up</td><td>Down</td><td>Insurance</td><td>01/03/2008</td><td></td><td></td><td></td><td>No</td><td>Yes</td><td>To Top</td><td>To B</td></tr><tr><td></td><td>Edit</td><td>Up</td><td>Down</td><td>Patient Balance Billing</td><td>01/03/2008</td><td></td><td></td><td></td><td>No</td><td>Yes</td><td>To Top</td><td>To B</td></tr></table> <table><tr><th></th><th>Edit</th><th>Auth #</th><th>Start Date</th><th>End Date</th><th>Delete</th></tr><tr><td></td><td>Edit</td><td></td><td>01/03/2008</td><td>01/02/2009</td><td>Delete</td></tr></table> <table><tr><th></th><th>Edit</th><th>Discipline</th><th>Procedure Code</th><th>CPT-4 Code</th><th>Quantity</th><th>Ref Quantity</th><th>Delete</th></tr><tr><td></td><td>Edit</td><td>PBB, Patient Balance Billing</td><td></td><td></td><td>999</td><td>999</td><td>Delete</td></tr></table>		Edit	Up	Down	Master Payer	Effective Date	Termination Date	HIC Number	Medicare ID	Full Disc	Full Supply	To Top	To B		Edit	Up	Down	Insurance	01/03/2008				No	Yes	To Top	To B		Edit	Up	Down	Patient Balance Billing	01/03/2008				No	Yes	To Top	To B		Edit	Auth #	Start Date	End Date	Delete		Edit		01/03/2008	01/02/2009	Delete		Edit	Discipline	Procedure Code	CPT-4 Code	Quantity	Ref Quantity	Delete		Edit	PBB, Patient Balance Billing			999	999	Delete
	Edit	Up	Down	Master Payer	Effective Date	Termination Date	HIC Number	Medicare ID	Full Disc	Full Supply	To Top	To B																																																								
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Action / Instruction	Screen Shot
<p>2. Create a visit note in CLINICAL – Patient Profile – Visit Note on last day of claim month with remaining balance</p> <p>Use note name created in ADMIN Step 4; SJ Transaction Code created in ADMIN Step 5; Assessor updated in ADMIN Step 6; select alternate discipline created in ADMIN Step 2; enter patient balance due in Alternate Charge Amount and select 'visit' for alternate charge basis.</p>	
FINANCIAL Module	
<p>1. Run Invoice Processing monthly cycle for PBB payer</p>	

Action / Instruction

2. Click [Print Required Claims] button to view and print the plain paper invoice to send to the patient.

Screen Shot



REMIT TO:

Florida Sunshine Home Health
1415 Orange Grove Lane
Parkland Corporate Complex
Suite 123
Parkland, FL 33067 (567) 756-7567

INVOICE DATE:

04/09/2008

INVOICE #:

641021

PATIENT ACCOUNT #:

20080409124015

PAGE:

1 of 1

PAYMENT DUE DATE:

02/10/2008

AMOUNT DUE:

10.00

BILL TO / RESPONSIBLE PARTY:

PATIENT:

Charles PBBTest
15 Apple Way
North Scituate, RI 02857

Charles PBBTest
15 Apple Way
North Scituate, RI 02857

PLEASE MAKE CHECKS PAYABLE TO "FLORIDA SUNSHINE HOME HEALTH". WRITE INVOICE AND ACCOUNT NUMBER ON CHECKS.
DETACH AND RETURN THIS PORTION WITH YOUR PAYMENT

Date	Item	Description	Quantity	Basis	Unit Rate	Discount	Total
01/31/2008	PBB, VST	Patient Balance Billing (G0156)	1.0	Visit	10.00		10.00

Service Period / Comments:

01/03/2008 - 01/31/2008 : Admission: 1/3/2008 : Diagnosis: 333.3, TICS OF ORGANIC ORIGIN

Previous Balance	- Payments	- Credits	+ Current Activity	+ / - Adjustments	= New Balance
0.00	0.00	0.00	10.00	0.00	10.00