

# CalMHSA

California Mental Health Services Authority



## SmartCare Billing Services User Guide

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# About this User Manual

This user manual is designed to provide a how-to guide of the features and functionality of SmartCare. It will outline how to set up and configure billing SmartCare in a step-by-step guide that will make understanding easy. Through this guide, you will learn about SmartCare's comprehensive suite of tools and advanced technologies to manage billing administration securely and efficiently.

## Audience

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This manual is intended for use by anyone who will be processing claims in the SmartCare EHR.

## Computer Literacy Assumptions for Understanding this User Manual

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- Ability to perform basic word processing such as typing and searching for documents in files
- Understands data entry techniques into electronic forms and documents
- Familiarity with running a windows operating system or other popular programs like Mac OS.
- Basic knowledge of data bases and their structure
- Basic knowledge of how to use internet browsers like Microsoft Edge and Google Chrome

## IT Support Requests:

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Please call our Help Desk at:916-214-8348 or submit a live chat question to <https://2023.calmhsa.org/>

**Note:** Before beginning to use the same system, make sure you have a compatible internet browser like Microsoft Edge and Google Chrome. CalMHSA recommends Google Chrome for best user experience.

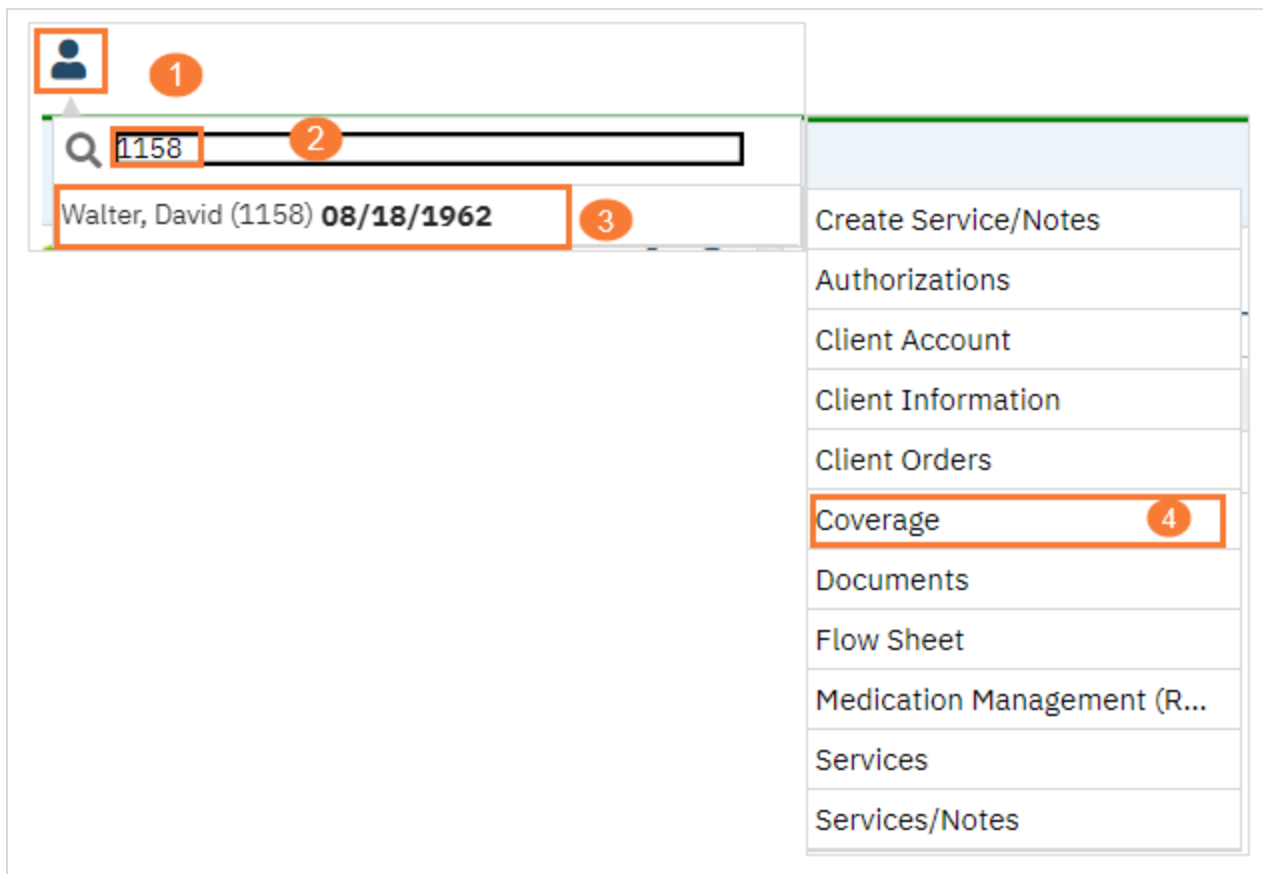
# Coverage/Plan

SmartCare can identify which order the guarantor should be for Clients who have more than one coverage. All predefined Plans COB order is hardcoded which sets the precedence for billing. Therefore, the staff does not have to worry about selecting the coverage order because the system does it automatically when the plans are added to the Plan Time Span.

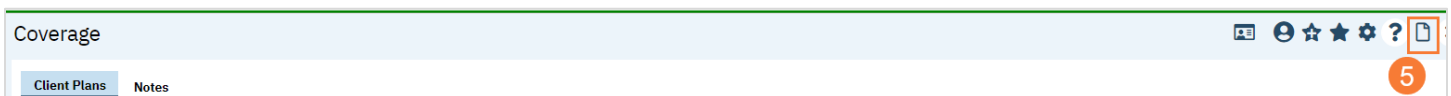
Primary, secondary and or Tertiary

## How to add Plan(s)

1. Search for client by Clicking on the Person icon
2. Type Last Name or record ID#
3. Click on the Client Name
4. Scroll to the right with mouse to Click on Coverage  
The Client Plans screen will open



5. Click on New icon to add a new Plan



6. Select Plan from the drop-down menu
  - a. Type Insured ID
  - b. Click Save

Repeat above steps for additional Plans

**Client Plans** Contract Scanning Save

General Claim Information Copayment Monthly Deductible

**Plan** 6

Plan \* [dropdown] i

Insurance Type Code [dropdown]

Insured ID \* [input] a

7. Plans are under the Client Plans tab
  - a. **Select a date for the Commercial Plan** Every Plan needs a Start Date
  - b. **Click Add** This will add the Plan to the Plan Time Spans
  - c. **Select a date for the Medi-Cal MH Plan** Every Plans needs a Start Date
  - d. **Click Add** This will add the Plan to the Plan Time Spans
  - e. If you need to View/Scan ID Cards

**Coverage** e

Client Plans Notes

**Client Plans** 7

Plan Name	Insured Id	Co-Pay	Start Date	End Date	COB	Service Area	
Commercial	JYP84888222	a	03/01/2022			MH	Add b
Medi-Cal MH	94455773A	c	01/01/2022			MH	Add d

8. Click on Change COB Order
  - a. The system has added the Plans COB automatically

Show Current Plans Only MH Maximize Time Spans

**Plan Time Spans**

03/01/2022 - No End Date 8 Change COB Order...

X Commercial	JYP84888222-321 Claim AveCity, IL 60623		Set End Date
X Medi-Cal MH	94455773A-1500 Capitol Avenue MS 2704Sacramento, CA 95899-7...		Set End Date

**COB Order** ? x

COB Order Save Close

**COB Order Details**

Plan Name	Insured ID	COB
Commercial	JYP84888222	1
Medi-Cal MH	94455773A	2

**Coverage**

Client Plans Notes

**Client Plans**

Plan Name	Insured Id	Co-Pay	Start Date	End Date	COB	Service Area	
<u>Commercial</u>	JYP84888222		<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	MH	<b>Add</b>
<u>Medi-Cal MH</u>	94455773A		<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	MH	<b>Add</b>

Show Current Plans Only MH  **Maximize Time Spans**

**Plan Time Spans**

03/01/2022 - No End Date **Change COB Order...**

<input checked="" type="checkbox"/>	Commercial	JYP84888222-321 Claim Ave	City, IL 60623	<input type="text"/>	<b>Set End Date</b>
<input checked="" type="checkbox"/>	Medi-Cal MH	94455773A-1500 Capitol Avenue MS 2704	Sacramento, CA 95899-7...	<input type="text"/>	<b>Set End Date</b>

9. Clients with Medicare and Medi-Cal

**Coverage**

Client Plans Notes

**Client Plans** 9

Plan Name	Insured Id	Co-Pay	Start Date	End Date	COB	Service Area	
<u>Medi-Cal MH</u>	CIN632322		05/01/2022	<input type="text"/>	<input type="checkbox"/>	MH	<b>Add</b>
<u>Medicare Part B-...</u>	1EG5-TE4-MK74		05/01/2022	<input type="text"/>	<input type="checkbox"/>	MH	<b>Add</b>

10. Click on Change COB Order

a. The system has added the Plans COB automatically

Show Current Plans Only    MH    Maximize Time Spans

**Plan Time Spans** 10

05/01/2022 - No End Date    Change COB Order...

X	Medicare Part B-Noridian	1EG5-TE4-MK74-PO BOX 6729Fargo, ND 58108	<input type="text"/>	<input type="calendar"/>	<input type="button" value="Set End Date"/>
X	Medi-Cal MH	CIN632322-1500 Capitol Avenue MS 2704Sacramento, CA 95899-7...	<input type="text"/>	<input type="calendar"/>	<input type="button" value="Set End Date"/>

**COB Order** ? x

**COB Order**   

**COB Order Details** a

Plan Name	Insured ID	COB
Medicare Part B-Nori...	1EG5-TE4-MK74	<input type="text" value="1"/>
Medi-Cal MH	CIN632322	<input type="text" value="2"/>

**Coverage**

Client Plans    Notes

**Client Plans**

Plan Name	Insured Id	Co-Pay	Start Date	End Date	COB	Service Area	
Medi-Cal MH	CIN632322		<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	MH	<input type="button" value="Add"/>
Medicare Part B-...	1EG5-TE4-MK74		<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	MH	<input type="button" value="Add"/>

Show Current Plans Only    MH    Maximize Time Spans

**Plan Time Spans**

05/01/2022 - No End Date    Change COB Order...

X	Medicare Part B-Noridian	1EG5-TE4-MK74-PO BOX 6729Fargo, ND 58108	<input type="text"/>	<input type="calendar"/>	<input type="button" value="Set End Date"/>
X	Medi-Cal MH	CIN632322-1500 Capitol Avenue MS 2704Sacramento, CA 95899-7...	<input type="text"/>	<input type="calendar"/>	<input type="button" value="Set End Date"/>

11. Clients who have both coverages for SUD and MH will display as follows:

Coverage

Client Plans Notes

Client Plans 11

Plan Name	Insured Id	Co-Pay	Start Date	End Date	COB	Service Area	
Medi-Cal DMC	8989928		01/01/2022			DMC	Add
Medi-Cal MH	9222222W		01/01/2022			MH	Add

12. From the Show Current Plans Only drop-down menu Select DMC

- Medi-Cal DMC Plan will display with the Effective Date
- Click on Change COB Order
- The system has added the Plan COB automatically

Show Current Plans Only DMC Maximize Time Spans

12

Plan Time Spans

01/01/2022 - No End Date Change COB Order... a b

Medi-Cal DMC 8989928-1500 Capitol Avenue MS 2704Sacramento, CA 95899-7413 Set End Date

COB Order

COB Order Save Close

COB Order Details c

Plan Name	Insured ID	COB
Medi-Cal DMC	8989928	1

13. From the Show Current Plans Only drop-down menu Select MH

- Medi-Cal MH Plan will display with the Effective Date
- Click on Change COB Order
- The system has added the Plan COB automatically

Show Current Plans Only MH Maximize Time Spans

13

Plan Time Spans

01/01/2022 - No End Date Change COB Order... d e

Medi-Cal MH 9222222W-1500 Capitol Avenue MS 2704Sacramento, CA 95899-... Set End Date



**COB Order** ? x

**COB Order** Save Close

**COB Order Details**

Plan Name	Insured ID	COB
Medi-Cal MH	92222222W	1

14. **Note:** Since the Plans for SUD and MH are for 2 different Programs, they will display one at a time under the Plan Time Spans.

**Coverage**

**Client Plans** Notes

**Client Plans**

Plan Name	Insured Id	Co-Pay	Start Date	End Date	COB	Service Area	
Medi-Cal DMC	8989928		01/01/2022			DMC	Add
Medi-Cal MH	92222222W		01/01/2022			MH	Add

Show Current Plans Only DMC Maximize Time Spans

**Plan Time Spans**

01/01/2022 - No End Date Change COB Order...

Medi-Cal DMC 8989928-1500 Capitol Avenue MS 2704 Sacramento, CA 95899-7413 Set End Date

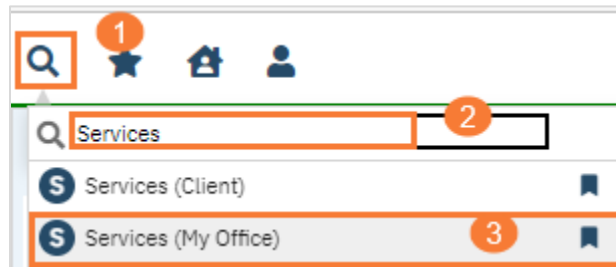
# Charges/Claims

Introduction to the section is to learn how you can manually bypass the overnight process to turn services into charges immediately. Generally, these processes automatically run overnight depending on how your county has it set up.

*Overnight processing* is when services are recorded, the overnight job will look at the service to determine whether that service is complete by checking if there's a signed progress note, billing diagnosis and any other requirements that are configured against those procedures specifically to determine that it's complete, then it will turn the "Status" from "Show" to "Complete". At this point, it must go through the 2<sup>nd</sup> overnight job, which says, based on the billing rules for that plan the system will go through a "liability distribution" that will identify any broken rules if no billing rules are broken then it will mark as "Ready to Bill".

## How to Bypass the Overnight Process to turn Services into Charges

1. Click on the Search icon
2. Type Services
3. Click on Services (My Office) This will show services for all Clients  
Services (Client) will show services only for one Client

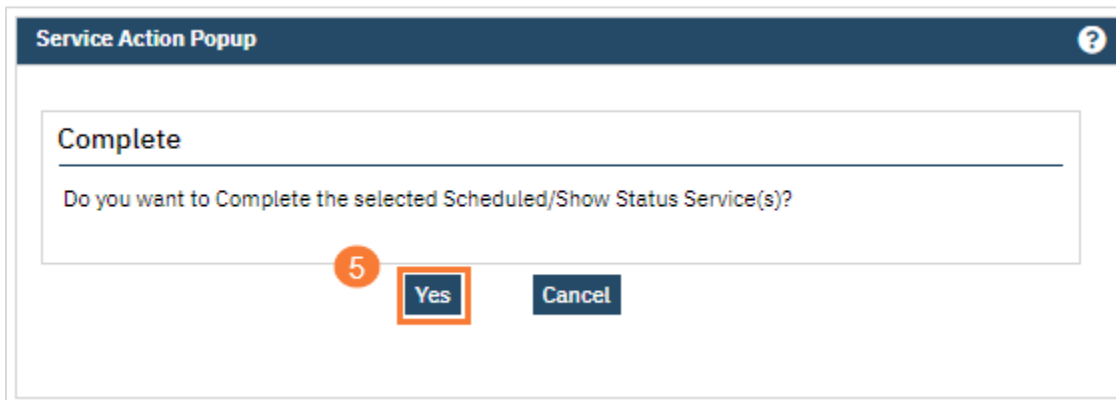


4. Select your parameters
  - a. Select Show from All Service Statuses This will select all Statuses of Show
  - b. Select a Date Range in the DOS From and DOS To field, this will cover the DOSs you're looking for
  - c. Click Apply Filter This will apply all the parameters you selected
  - d. Click on All This will select All the listed services
  - e. Select Action drop down menu
  - f. Click on Complete This will Change all Shows Statuses to Complete

A screenshot of the 'Services (3)' interface. The interface includes various filters and a table of services. A dropdown menu is open, showing the 'Complete' action selected. The table below shows three services with their details.

Client Name	DOS	Units	Charge (Rate Id)	Procedure	Status	Clinician	Program	Location	Comment
Xavier, Angela (1028)	12/04/2022 1:00 PM		78.16 (5)	Evaluation	Show	Williams, La...	SUD Outpati...	Office	
Owens, Sandra (1088)	12/03/2022 12:00 PM		78.30 (16...	Comprehensive Multi...	Show	Williams, La...	Outpatient M...	Rural Health ...	
Lewis, Monica (1109)	12/03/2022 11:30 AM		78.30 (16...	Comprehensive Multi...	Show	Williams, La...	Outpatient M...	Office	

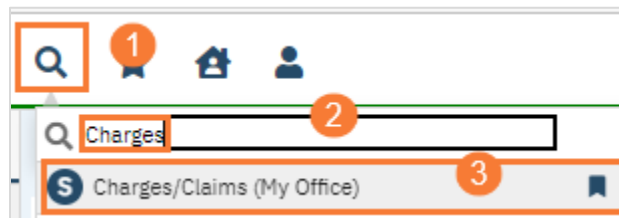
5. Click Yes



## Charges/Claims Electronic

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1. Click on the Search icon
2. Type Charges
3. Click on Charges/Claims (My Office)



4. Select your parameters
  - a. Select All Charges (ready to bill or not) from drop down menu First job of the overnight process to turn services into charges
  - b. Enter a start date in the DOS From field, this will start the date range for the DOS you want to Search
  - c. Enter an end date in the DOS To field, this will add an end date for the services you want to Search
  - d. Click the box next to Show charges with balance This will ensure you're looking at claims with balances
  - e. Click Apply Filter This will apply all the parameters you selected
  - f. Select All or Click only on the services you want to process This will select the services you want to process
  - g. Click on Select Action Drop down menu
  - h. Select Mark Ready to Bill 2<sup>nd</sup> job of the overnight process. This will have the charges ready to bill electronically or paper claims

FYI: You can also search services by Payers, Plans, and Financial Assignment

Charges/Claims (5) 4

Select Action g

All Payer Types a All Payers All Plans Financial Assignment... Apply Filter

All Charges (ready to bill or not) e All Priorities All Programs All Procedure Codes

Show unbilled charges All Service Area Capitated/ Non Capitated All Error Reasons

All Locations # of client statements since charge crea

Charge Creation From Charge Creation To

Service ID Charge ID b Process ID c All Clinicians

Client ID d DOS From 12/03/2022 DOS To 12/04/2022 Processed From Processed To

Show charges with balance  Show charges with credit balance  Included Error Services  Show charges in Internal Collections

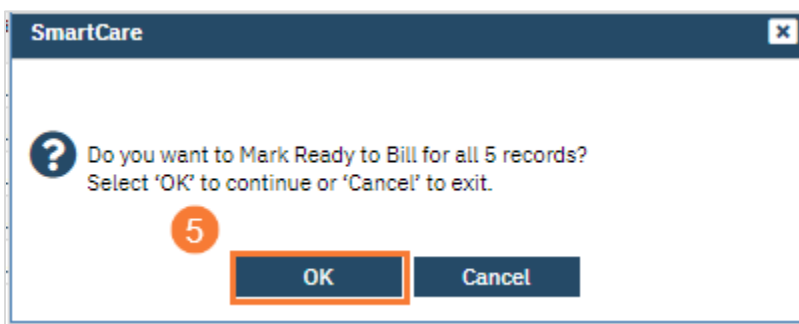
Exclude from Work Queue  Not counted toward Work Queue Productivity  Show charges with balances greater than zero

Show \$0 Balance Paid Charges f

Select: All, All on Page, None Charges Total \$547.96

Charge Id	Plan	Client Name	DOS	Clinician	Procedure Name	Charge	Balance	Unbilled	Paid Amt	Bill Date	Flagged	Process	Batch	ClaimLine ItemId	Program Name
<input checked="" type="checkbox"/>	396	Medi-Cal DMC	Xavier, Angela (10...	12/04/2022 01:...	Williams, LeQuita	Evaluation	\$78.16	\$78.16	78.16						SUD Outpatient
<input checked="" type="checkbox"/>	397	Medi-Cal MH	Owens, Sandra (1...	12/03/2022 12:...	Williams, LeQuita	Comprehensiv...	\$78.30	\$78.30	78.30						Outpatient MH A...
<input checked="" type="checkbox"/>	398	Medi-Cal MH	Lewis, Monica (11...	12/03/2022 11:...	Williams, LeQuita	Comprehensiv...	\$78.30	\$78.30	78.30						Outpatient MH A...
<input checked="" type="checkbox"/>	393	Medi-Cal MH	Lamar, Ravens (10...	12/03/2022 10:...	Williams, LeQuita	Comprehensiv...	\$156.60	\$156.60	156.60						Outpatient MH A...
<input checked="" type="checkbox"/>	392	Medi-Cal MH	Banks, Tara (1078)	12/03/2022 09:...	Williams, LeQuita	Comprehensiv...	\$156.60	\$156.60	156.60						Outpatient MH A...

5. Click OK



6. Select Ready to Bill Only from the drop-down menu

- a. Click Apply Filter
- b. Click on Select All
- c. Click the Electronic Claims Icon

Charges/Claims (5) a

Select Action c

All Payer Types 6 All Payers All Plans Financial Assignment... Apply Filter

Ready To Bill Only e All Priorities All Programs All Procedure Codes

Show unbilled charges All Service Area Capitated/ Non Capitated All Error Reasons

All Locations # of client statements since charge crea

Charge Creation From Charge Creation To

Service ID Charge ID b Process ID c All Clinicians

Client ID d DOS From 12/03/2022 DOS To 12/04/2022 Processed From Processed To

Show charges with balance  Show charges with credit balance  Included Error Services  Show charges in Internal Collections

Exclude from Work Queue  Not counted toward Work Queue Productivity  Show charges with balances greater than zero

\$0 Balance Paid Charges f

Select: All, All on Page, None Charges Total \$547.96

Charge Id	Plan	Client Name	DOS	Clinician	Procedure Name	Charge	Balance	Unbilled	Paid Amt	Bill Date	Flagged	Process	Batch	ClaimLine ItemId	Program Name
<input checked="" type="checkbox"/>	396	Medi-Cal DMC	Xavier, Angela (10...	12/04/2022 01:...	Williams, LeQuita	Evaluation	\$78.16	\$78.16	78.16						SUD Outpatient
<input checked="" type="checkbox"/>	397	Medi-Cal MH	Owens, Sandra (1...	12/03/2022 12:...	Williams, LeQuita	Comprehensiv...	\$78.30	\$78.30	78.30						Outpatient MH A...
<input checked="" type="checkbox"/>	398	Medi-Cal MH	Lewis, Monica (11...	12/03/2022 11:...	Williams, LeQuita	Comprehensiv...	\$78.30	\$78.30	78.30						Outpatient MH A...
<input checked="" type="checkbox"/>	393	Medi-Cal MH	Lamar, Ravens (10...	12/03/2022 10:...	Williams, LeQuita	Comprehensiv...	\$156.60	\$156.60	156.60						Outpatient MH A...
<input checked="" type="checkbox"/>	392	Medi-Cal MH	Banks, Tara (1078)	12/03/2022 09:...	Williams, LeQuita	Comprehensiv...	\$156.60	\$156.60	156.60						Outpatient MH A...

Every Payer will have their own Batch number. You can choose to Select the Batch you want to process by Clicking on the drop-down menu for “Select Batch” or keep the default setting “All Batches” which will process all Batches listed.

7. Choose a Batch or keep default setting to “All Batches”
  - a. Click Process Now

**Claims Processing**

Save As... Create Claim File **Process Now** Close

You have selected 5 charges to be processed with a total amount of \$547.96

Electronic  Process Later  
 Paper  Process Now

Select Batch: All Batches Delete Batch

**Remove Selected Charges From Batch**

Select: All, All on Page, None

Batch #	Claim Line #	Service ID	Plan	Client ID	Client Name	Procedure	DOS	Status	Staff Name
<input type="checkbox"/> 123	Medi-Cal DMC-DM...	983	Medi-...	1028	Xavier, Angela	Evaluation	12/04/2022 01:00...	Selected	William
<input type="checkbox"/> 122	Medi-Cal MH-MH ...	982	Medi-...	1088	Owens, Sandra	Comprehensive M...	12/03/2022 12:00...	Selected	William
<input type="checkbox"/> 122	Medi-Cal MH-MH ...	981	Medi-...	1109	Lewis, Monica	Comprehensive M...	12/03/2022 11:30...	Selected	William
<input type="checkbox"/> 122	Medi-Cal MH-MH ...	980	Medi-...	1069	Lamar, Ravens	Comprehensive M...	12/03/2022 10:00...	Selected	William
<input type="checkbox"/> 122	Medi-Cal MH-MH ...	979	Medi-...	1078	Banks, Tara	Comprehensive M...	12/03/2022 09:00...	Selected	William

8. Processed Successfully message
  - a. Click Create Claim File

**Claims Processing**

✔ Processed Successfully Save As... **Create Claim File** Process Now Close

You have selected 5 charges to be processed with a total amount of \$547.96

Electronic  Process Later  
 Paper  Process Now

Select Batch: All Batches Delete Batch

**Remove Selected Charges From Batch**

Select: All, All on Page, None

Batch #	Claim Line #	Service ID	Plan	Client ID	Client Name	Procedure	DOS	Status	Staff Name
<input type="checkbox"/> 122-Medi-Cal MH-MH ...	193	979	Medi-...	1078	Banks, Tara	Comprehensive M...	12/03/2022 09:00...	Process...	Williams,
<input type="checkbox"/> 122-Medi-Cal MH-MH ...	192	980	Medi-...	1069	Lamar, Ravens	Comprehensive M...	12/03/2022 10:00...	Process...	Williams,
<input type="checkbox"/> 122-Medi-Cal MH-MH ...	194	982	Medi-...	1088	Owens, Sandra	Comprehensive M...	12/03/2022 12:00...	Process...	Williams,
<input type="checkbox"/> 122-Medi-Cal MH-MH ...	195	981	Medi-...	1109	Lewis, Monica	Comprehensive M...	12/03/2022 11:30...	Process...	Williams,
<input type="checkbox"/> 123-Medi-Cal DMC-DM...		983	Medi-...	1028	Xavier, Angela	Evaluation	12/04/2022 01:00...	Selected	Williams,

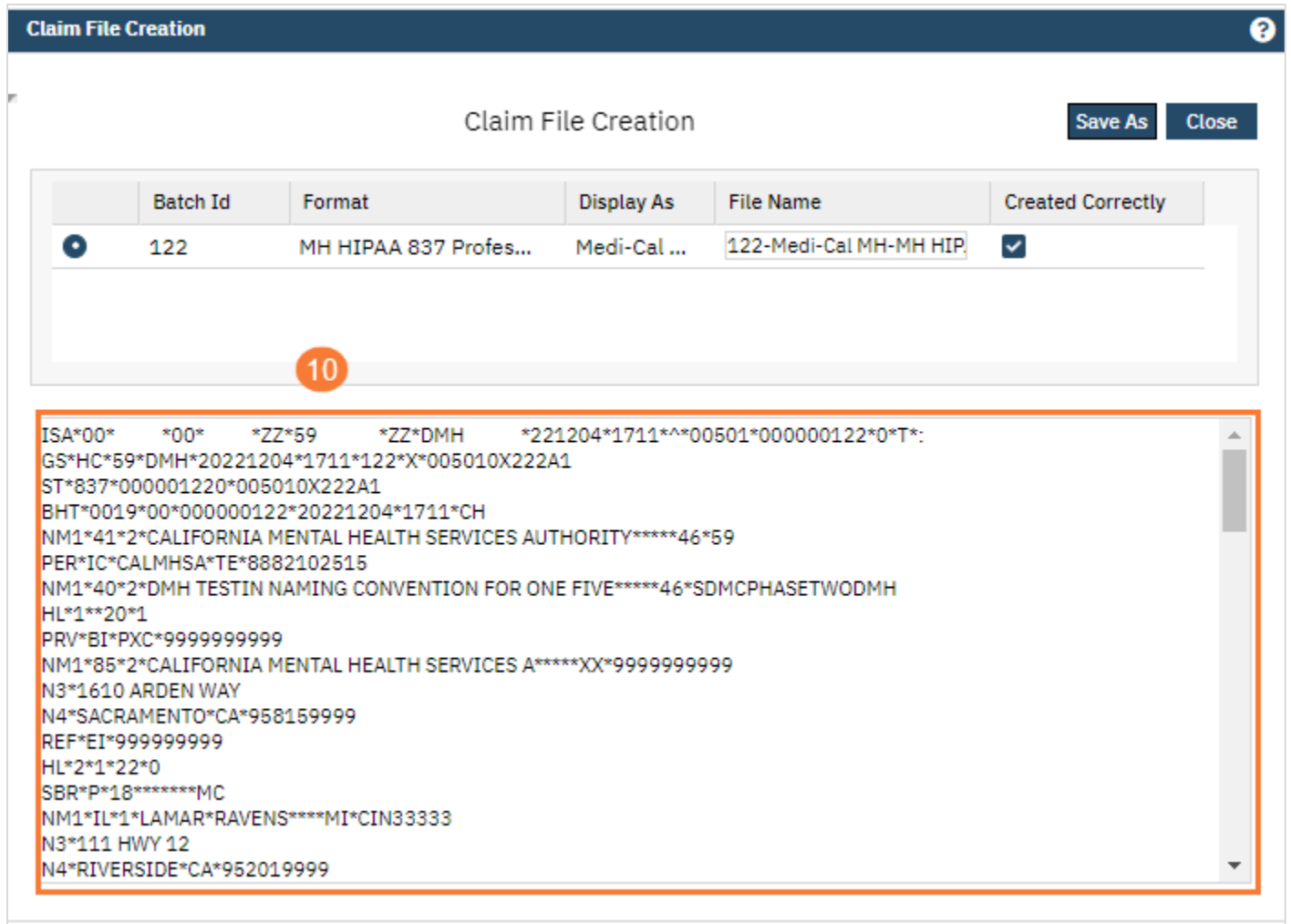
9. Optional: File Name can be changed

a. Click Save As

Check your download folder on your local Desktop for the Claims folder

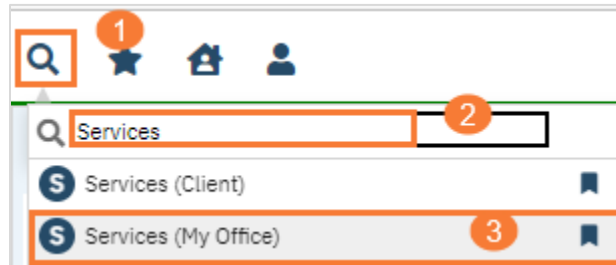


10. Image of the 837 File Displayed



## How to Process Paper Claims

1. Click on the Search icon
2. Type Services
3. Click on Services (My Office)

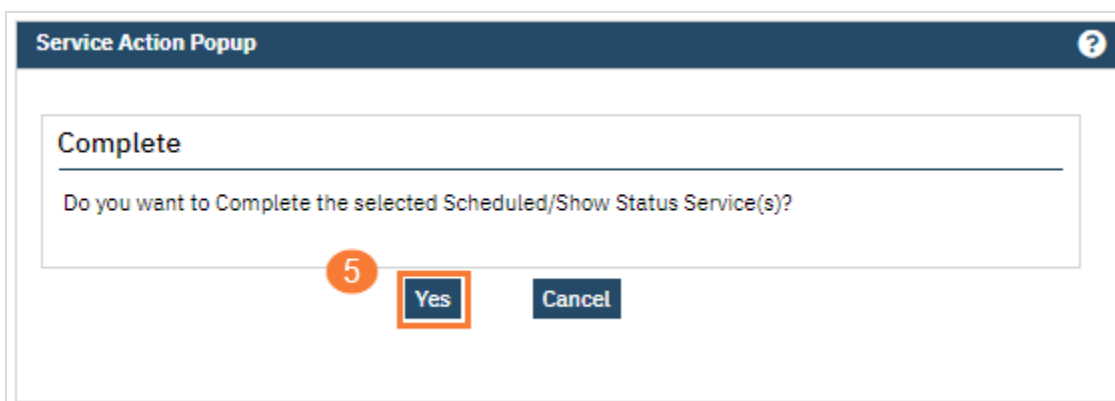


4. Select your parameters
  - a. Select Show from All Service Statuses drop-down menu This will select Statuses with Show
  - b. Select a Date Range in the DOS From and DOS To field, this will search all DOSs in this range
  - c. Click on Apply Filter This will apply the parameters you selected
  - d. Click on All This will select all services that's listed
  - e. Click on the Select Action drop down menu
  - f. Click on Complete This will change all status to Complete

A screenshot of the "Services (3)" page. The page has a header "Services (3)" (4). Below the header, there are several filter sections. The "Show" dropdown menu is set to "Show" (a). The "DOS From" and "DOS To" fields are set to "12/03/2022" and "12/04/2022" respectively (b). The "Apply Filter" button is highlighted (c). Below the filters, there is a "Select:" dropdown menu set to "All" (d). A table of services is displayed below the filters. The table has columns for Client Name, DOS, Units, Charge (Rate Id), Procedure, Status, Clinician, Program, Location, and Comment. Three rows are visible, each with a checked checkbox in the first column: "Xavier, Angela (1028)", "Owens, Sandra (1088)", and "Lewis, Monica (1109)". A "Select Action" dropdown menu is open on the right side of the page, showing options: "Select Action", "Error", "Error, Copy and Move Note", "Generate Bundled Service", "Regenerate Charge", "Complete" (f), "Cancel", and "No Show".

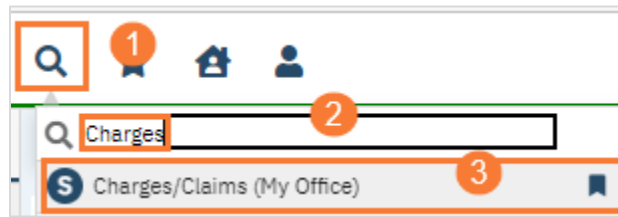
Client Name	DOS	Units	Charge (Rate Id)	Procedure	Status	Clinician	Program	Location	Comment
<input checked="" type="checkbox"/> Xavier, Angela (1028)	12/04/2022 1:00 PM		78.16 ( 5 )	Evaluation	Show	Williams, La...	SUD Outpati...	Office	
<input checked="" type="checkbox"/> Owens, Sandra (1088)	12/03/2022 12:00 PM		78.30 ( 16...	Comprehensive Multi...	Show	Williams, La...	Outpatient M...	Rural Health ...	
<input checked="" type="checkbox"/> Lewis, Monica (1109)	12/03/2022 11:30 AM		78.30 ( 16...	Comprehensive Multi...	Show	Williams, La...	Outpatient M...	Office	

5. Click Yes



## Charges/Claims Paper

1. Click on the Search icon
2. Type Charges
3. Click on Charges/Claims (My Office)



4. Select Parameters
  - a. Select All Charges (ready to bill or not) from drop-down menu
  - b. Select a Date Range in the DOS From and DOS To field, this will search for Services in that Date range
  - c. Click the box next to Show charges with balance
  - d. Click on Apply Filter
  - e. Select Service by clicking Select All or Click only the Services you wish to process
  - f. Click Select Action to get the drop-down menu to display
  - g. Select Mark Ready to Bill

Charges/Claims (3) f

**a** All Payer Type: MH Medi-Cal **d** Financial Assignment: All Plans **Apply Filter**

**a** All Charges (ready to bill or not) **d** All Priorities All Programs All Procedure Codes

Show unbilled charges: All Service Area **d** All Error Reasons

All Locations: # of client statements since charge cre...

Charge Creation From: Charge Creation To:

Service ID: Charge ID: **b** Process: Batch: All Clinicians

**c** ID: **b** DOS From: 12/03/2022 **b** DOS To: 12/04/2022 **b** Processed From: Processed To:

Show charges with balance  Show charges with credit balance  Included Error Services  Show charges in Internal Collections

Exclude from Work Queue  Not counted toward Work Queue Productivity  Show charges with balances greater than zero

Show \$0 Balance Paid Charges

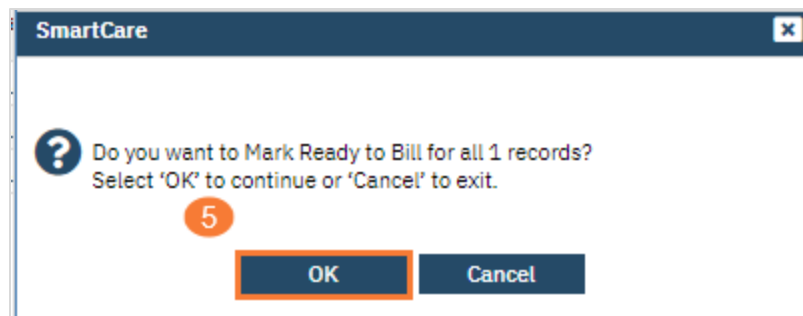
Select: All, All on Page, None Charges Total: \$156.60

Charge Id	Plan	Client Name	DOS	Clinician	Procedure Name	Charge	Balance	Unbilled	Paid Amt	Bill Date	Flagged	Process	Batch	ClaimLine ItemId	Program Name
<input checked="" type="checkbox"/> 395	Medi-Cal MH	Wilson, Kevin (103...	12/03/2022 08:...	Williams, LaQuita	Comprehensiv...	\$156.60	\$156.60	156.60							Outpatient MH A
<input type="checkbox"/> 393	Medi-Cal MH	Lamar, Ravens (10...	12/03/2022 10:...	Williams, LaQuita	Comprehensiv...	\$156.60	\$156.60	156.60							Outpatient MH A
<input type="checkbox"/> 392	Medi-Cal MH	Banks, Tera (1078)	12/03/2022 09:...	Williams, LaQuita	Comprehensiv...	\$156.60	\$156.60	156.60							Outpatient MH A

**f** Select Action

- Select Action
- Add Delay Reason
- Add to External Collections
- Add to Internal Collections
- Batch Update Billing Code and Revenue Code
- Mark as Do Not Bill
- Mark as Flagged
- Mark as Rebill
- Mark claim line To Be Replaced
- Mark claim line To Be Voided
- g** Mark Ready to Bill
- Remove Flagged
- Remove from Do Not Bill
- Remove from Internal Collections
- Remove from Ready to Bill
- Remove from Rebill
- Remove from To Be Replaced
- Remove from To Be Voided

5. Click OK





6. Select Ready To Bill Only
  - a. Click Apply Filter
  - b. Select the service by clicking on the box next to the service you want to process
  - c. Click on the Paper Claim Icon

Charges/Claims (1)

Select Action

6

All Payer Types: Ready To Bill Only

MH Medi-Cal

All Plans

Financial Assignment...

Apply Filter

Show unbilled charges: All Service Area

All Locations: # of client statements since charge crei

Charge Creation From: Charge Creation To:

Service ID: Charge ID: Process ID: Batch: All Clinicians

Client ID: DOS From: 12/03/2022: DOS To: 12/04/2022: Processed From: Processed To:

Show charges with balance  Show charges with credit balance  Included Error Services  Show charges in Internal Collections

Exclude from Work Queue  Not counted toward Work Queue Productivity  Show charges with balances greater than zero

Show \$0 Balance Paid Charges

Select: All, All on Page, None

Charges Total \$156.60

Charge Id	Plan	Client Name	DOS	Clinician	Procedure Name	Charge	Balance	Unbilled	Paid Amt	Bill Date	Flagged	Process	Batch	ClaimLine I
<input checked="" type="checkbox"/> 395	Medi-Cal MH	Wilson, Kevin (103...	12/03/2022 08:...	Williams, LaQuita	Comprehensiv...	\$156.60	\$156.60	156.60						

7. Click Process Now

Claims Processing

Save As... Print Claims... Process Now Close

You have selected 1 charges to be processed with a total amount of \$156.60

Electronic  Process Later

Paper  Process Now

Select Batch: All Batches Delete Batch

Remove Selected Charges From Batch

Select: All, All on Page, None

Batch #	Claim Line #	Service ID	Plan	Client ID	Client Name	Procedure	DOS	Status	Staff N
<input type="checkbox"/> 121-Medi-Cal MH-HCF...		978	Medi-...	1031	Wilson, Kevin	Comprehensive M...	12/03/2022 08:00...	Selected	William

8. Processed Successfully message
  - a. Click Print Claims

Processed Successfully

Claims Processing

Save As... Print Claims... Process Now Close

You have selected 1 charges to be processed with a total amount of \$156.60

Electronic  Process Later

Paper  Process Now

Select Batch: All Batches Delete Batch

Remove Selected Charges From Batch

Select: All, All on Page, None

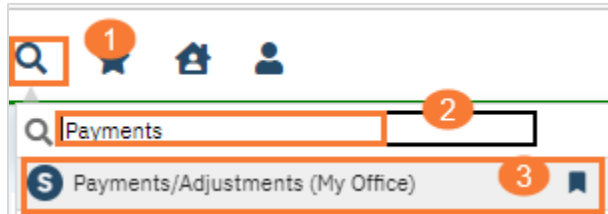
Batch #	Claim Line #	Service ID	Plan	Client ID	Client Name	Procedure	DOS	Status	Staff N
<input type="checkbox"/> 121-Medi-Cal MH-HCF...	191	978	Medi-...	1031	Wilson, Kevin	Comprehensive M...	12/03/2022 08:00...	Process...	Williams,

# Payment/Adjustments

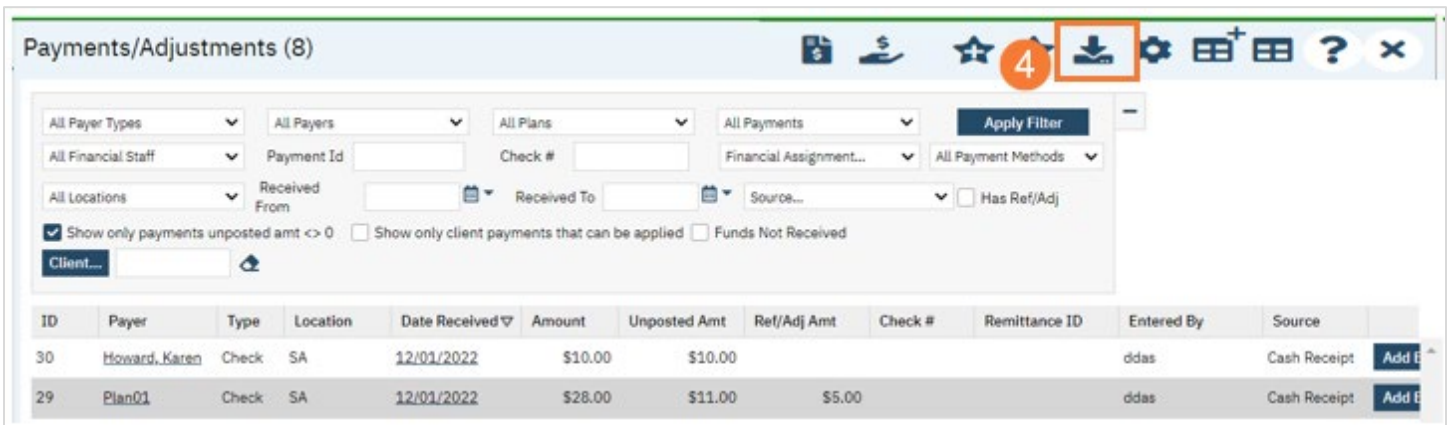
Generally, the 835 have payments and benefits information of what's paid and what's not covered, etc. However, there are different forms of Remittance such as: Electronic, Paper and some Client payments. The below steps will show you how to upload 835 files and process EOB's and Client payments manually.

## Export Payments/Adjustments Report to Excel

1. Click on the Search icon
2. Type Payments
3. Click on Payments/Adjustments (My Office)

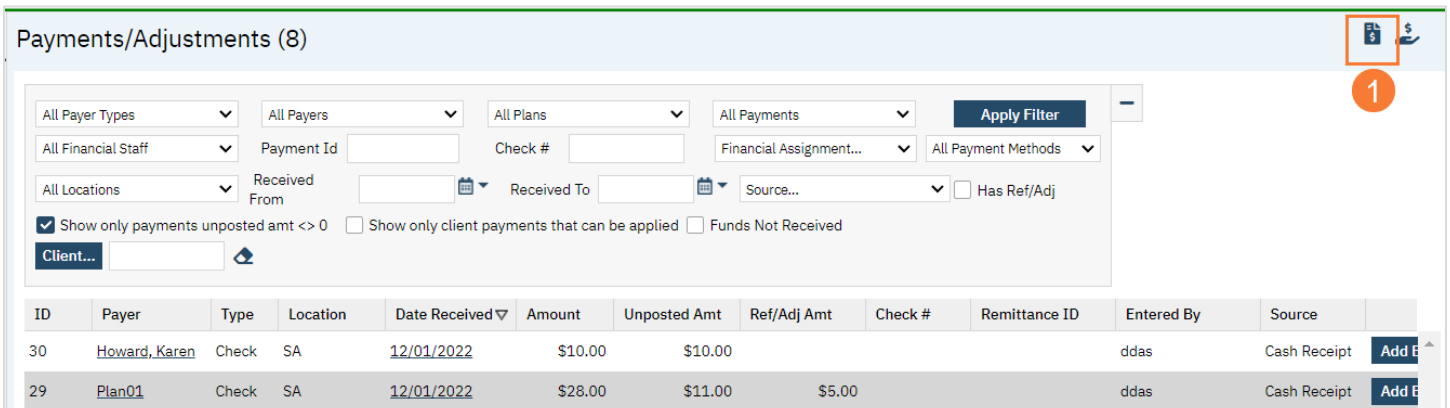


4. Click on the Export icon
  - a. The Excel File will be in your download folder located on your computer

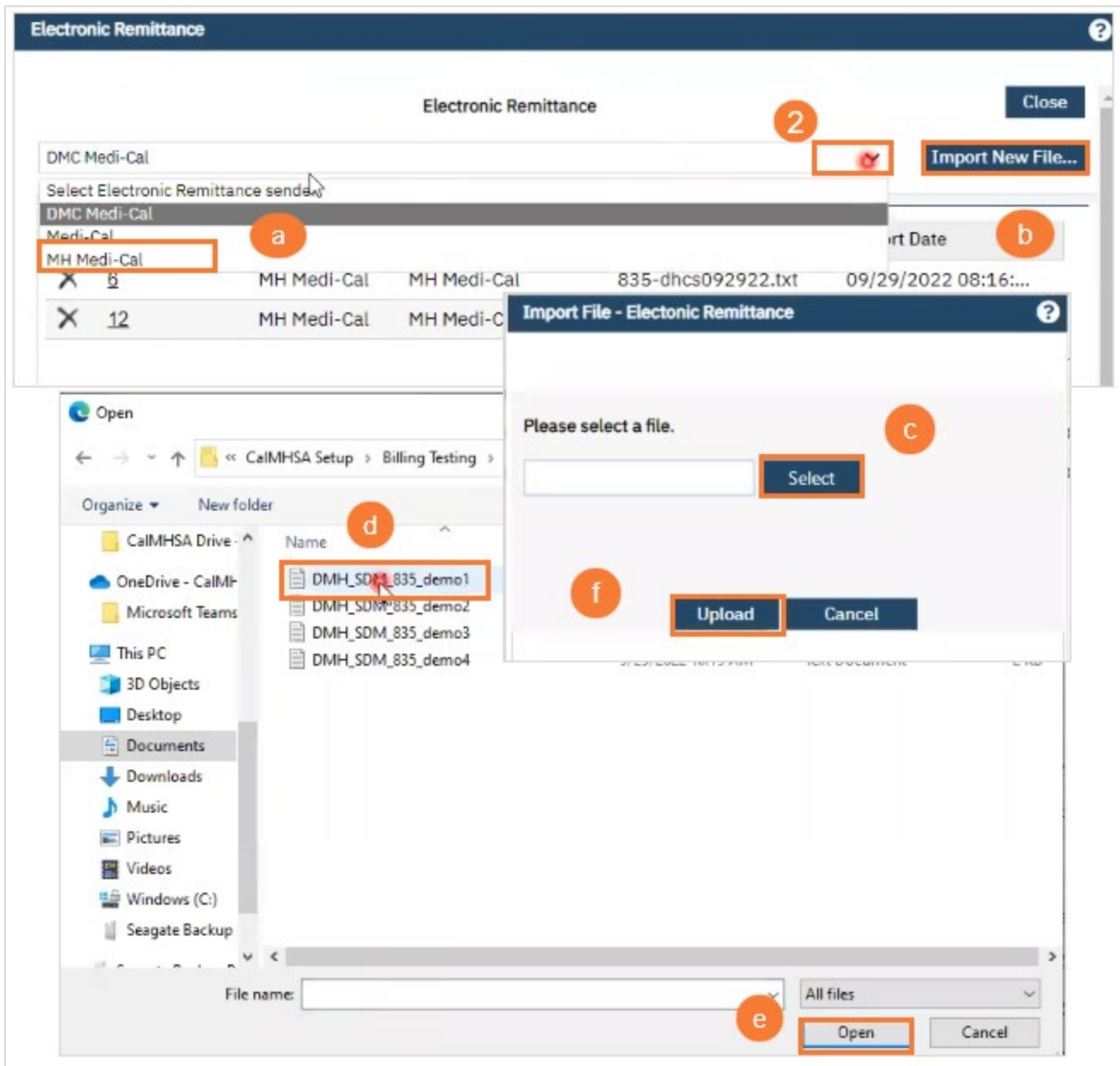


## How to Import an 835 Remittance File

1. Click on the Electronic Remittance icon



2. Click on Select Electronic Remittance Sender drop down menu
  - a. Select a Payer from the list
  - b. Click Import New File
  - c. Click Select
  - d. A folder will open on your local PC where the file is located, click on the 835 Remittance you want to import
  - e. Click Open
  - f. Click Upload



The ERA will display the Dump File on screen

3. Option: Add a Payment Date or the system will automatically use what's in the File
  - a. Click Process File

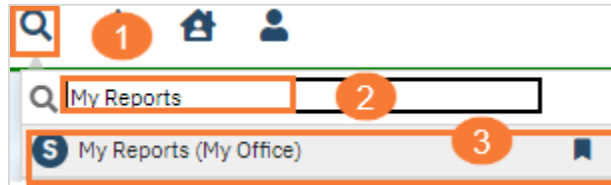
4. **Processed Successfully message**, means File processed successfully, this does not mean all services were paid
  - a. Click Save
  - b. Click Close
  - c. FYI: ER File ID

## How to View the 835 File after Imported

It's several Electronic Reports you can view and or download to an excel spreadsheet to work.

Follow the below steps:

1. Click on the Search icon
2. Type My Reports
3. Click on My Reports (My Office)

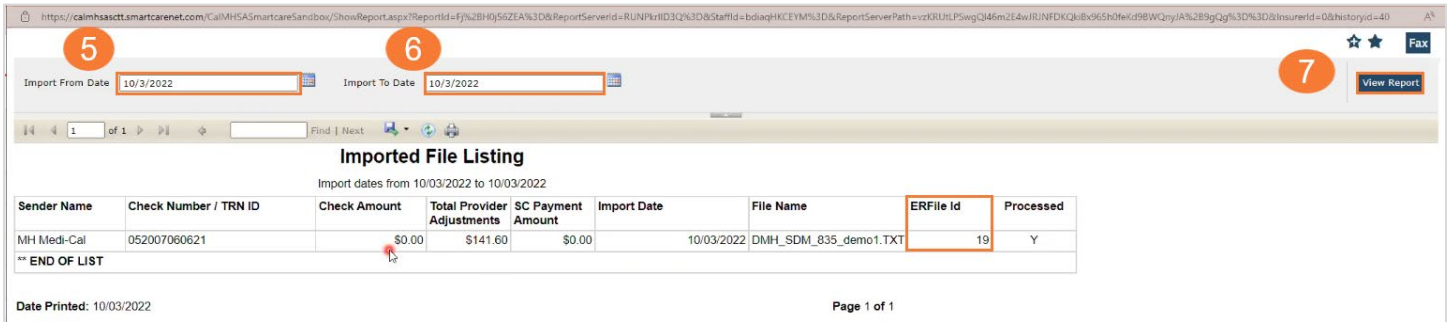


FYI: ER Denials, ER Claim Line Errors, and ER Claim Lines Unposted Reports live in My Reports too

4. Click on ER File List

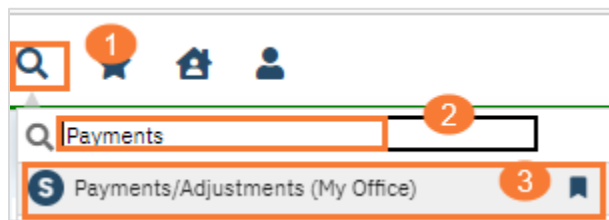
My Reports (53)	
CoreStandardReports	Search
Report Name	Description
<a href="#">Discharge Report</a>	
<a href="#">Discharged Clients With Active...</a>	
<a href="#">Documentation Due Dates by Cas...</a>	
<a href="#">DSM IV To ICD9 Map</a>	
<a href="#">EOB For Paper Claims</a>	
<a href="#">ER Claim Line Denials</a>	835 Claim Lines where payment was deni...
<a href="#">ER Claim Line Denials CSV</a>	835 Claim Lines where payment was deni...
<a href="#">ER Claim Line Details</a>	Full details on claims included in a g...
<a href="#">ER Claim Line Details CSV</a>	Full details on claims included in a g...
<a href="#">ER Claim Line Errors</a>	835 Claim Lines where there were issue...
<a href="#">ER Claim Line Errors CSV</a>	835 Claim Lines where there were issue...
<a href="#">ER Claim Lines Unposted</a>	835 Claim Lines where the payment amou...
<a href="#">ER Claim Lines Unposted CSV</a>	835 Claim Lines where the payment amou...
<a href="#">ER File Detail</a>	Detail (including errors) for an 835 f...
<a href="#">ER File List</a>	List of 835 files filtered by Date imp...

5. Select Import From Date
6. Select To Date
7. Click View Report



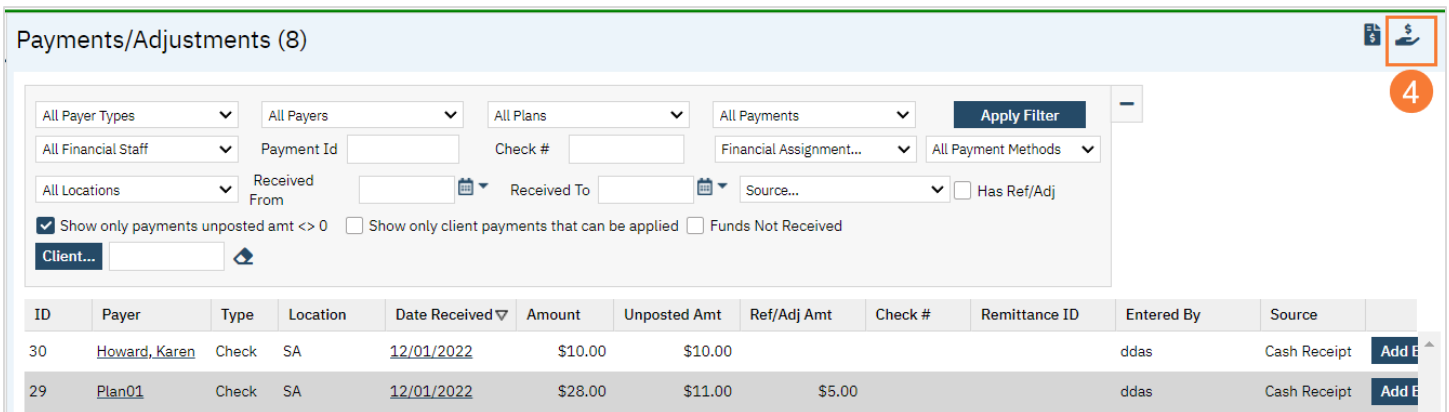
## How to Enter a Check & Post an EOB

1. Click on the Search icon
2. Type Payments
3. Click on Payments/Adjustments (My Office)



## Entering a Check

4. Click on the New EOB/Payment/Adjustment icon



5. Select Date of Check
  - a. Select Type from drop-down menu This would be Client Payment, EOB/Payer Payment, or Adjustment
  - b. Type the check Amount This is the dollar amount of the check you're posting
  - c. Select Payer or Select Plan from the drop-down menu This is who the check is coming from
  - d. Select Payment (pmt) Method from the drop-down menu. This is the form of payment, cash, check, etc.

- e. Type in the Ref # This would be the check number
- f. Select the Location from drop-down menu This would cover Mental Health, SUD or Patient Portal
- g. Select the Source from drop-down menu This is where you received the payment from
- h. Click on Update Now your check has been entered

The screenshot shows the 'Payment/Adjustment Posting' form. Callouts are as follows:
 

- 5**: Date field (12/09/2022)
- a**: Type dropdown menu (EOB/Payer Payment)
- b**: Amount field (\$75.00)
- c**: Payer dropdown menu (Medi-Cal MH)
- d**: Payment Information section header
- e**: Ref # field (4345)
- f**: Location dropdown menu (MH)
- g**: Source dropdown menu (Mail)
- h**: Update button

## Posting an EOB or Client Payments

1. Click on Service Search tab
  - a. Select your Parameters
  - b. Make sure a check mark is on Find Only Services Where the Balance >0
  - c. Select the service(s) you want to post this payment towards
  - d. Click Select

The screenshot shows the 'Service Search' form. Callouts are as follows:
 

- 1**: Service Search tab
- a**: Select Services section header
- b**: Find Only Services Where the Balance >0 checkbox
- c**: Service selection checkbox (789)
- d**: Select button

Service Id	Name	Date Of Service	Billing Code	CPT Code	Claim Line #	Charge	Payment	Adjustment	Balance	Program	Clinician	Procedure Code
<input type="checkbox"/> 201	Xavier, Angela (1...	02/01/2022 1:...	Family Therapy 60.00 Minutes	90847	101	\$60.00	\$0.00	\$0.00	\$60.00	Outpatient ...	Williams, L...	Family Therapy
<input type="checkbox"/> 101	Billing, June (101...	03/08/2022 10:...	EM New Pt. Lvl 2 (99202) 60.00 ...	99202	72	\$40.00	\$0.00	\$0.00	\$40.00	Main St - Ps...	Brydon, Je...	EM New Pt. Lvl...
<input checked="" type="checkbox"/> 789	Lewis, Monica (1...	04/11/2022 11:...	Office or Other Outpatient Visit of...	H2010	122	\$156.60	\$0.00	\$0.00	\$156.60	Outpatient ...	Williams, L...	Office or Other...
<input type="checkbox"/> 790	Lewis, Monica (1...	04/18/2022 9:...	Office or Other Outpatient Visit of...	H2010	123	\$156.60	\$0.00	\$0.00	\$156.60	Outpatient ...	Williams, L...	Office or Other...
<input type="checkbox"/> 30	Timmerly, Teresa ...	06/01/2022 12:...	Psychiatric Diagnostic Evaluation...	H2015	64	\$130.50	\$0.00	\$0.00	\$261.00	Outpatient ...	Stephan, K...	Psychiatric Dia...

2. Type the amount of how much was paid toward the charge
  - a. Type an adjustment amount Only apply if there is an adjustment
  - b. Select Adjustment Code from the drop-down menu
  - c. Select who the balance will be transferred to from the Trf To Field drop-down menu
  - d. Select Trf Code from the drop-down menu
  - e. Click Add
  - f. Click Update
  - g. Pop-up box: Are you sure you wish to apply these payments/adjustments to the selected services? Click Yes

Payment/Adjustment Posting

Activity | Service Search

Activity: Date: 12/09/2022, By: williams, Type: EOB/Payer Payment, ID: 31, Amount: \$75.00, Comment: [Empty], Acct. Period: December-2022

Payer: Payer: [Empty], Plan: Medi-Cal MH

Payment Information: Electronic: [Checked], Pmt Method: Check, Ref #: 4345, Location: MH, Source: Mail

Applied: \$0.00, Balance: \$75.00, Ref/Adj: \$0.00, Funds Not Received: [Unchecked], Print Receipt

Plans: 1. Medi-Cal MH Monthly client charges for DOS: \$0.00

Services: Selected Services | Refund/Adjustment | EOB

156.60 | 0.00 | Adj Code | Split... | Flag | 0.00 | Trf To | Trf Code | Do not Bill | Split... | Other | Add

Service Id	Description	DOS	Procedure	Charge	Balance	To Post	New Balance	Next Payer
789	Lewis, Monica (1109)	04/11/2022 11:00 AM	Office or Other Outpatient Visit of an Est...	\$156.60	\$156.60		156.60	

Confirmation Message

Are you sure you wish to apply these payments/adjustments to the selected services?

g Yes No Cancel

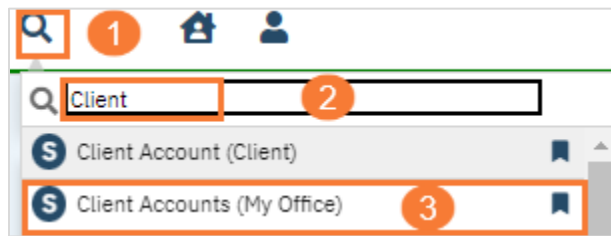


# Client Account

Clients Account is a one stop shop for Billers. Here are some functions you can perform within Clients Account but not limited to, check Clients Current Balance, Unpaid Services, Unposted Payments, Last Statement Sent, Payment Arrangement Amount, 3<sup>rd</sup> Party Payer Information, Payment History, Financial Information Complete, Add to Internal and External Collections, Don't Send Statement, Financial Summary, View Past Statements, Generate claims, Post payments, and Charge/Payment Summary.

## How to Export Clients Account to Excel

1. Click on the Search icon
2. Type Client
3. Click on Client Account (My Office) this is for all the Clients  
Client Account (Client) is just for one Client



Any combination of parameters will show a List Page Report that can be exported to an excel spreadsheet to work.

4. You can select your parameters:
  - a. Click All
  - b. Click Apply Filter
  - c. Click on the Export icon

The screenshot shows the 'Client Accounts (15)' list page. The page title is 'Client Accounts (15)' and it is in 'Processing' status. The filters section includes dropdown menus for 'All Clients', 'All Episode Statuses', 'Enrolled in Program...', 'Complete and Incomplete Financial Information', 'Last Name Begins With...', 'All Clinicians', 'Client Balance > 0', and 'Financial Assignment...'. There is a checkbox for 'Don't Send Statement' and an 'Apply Filter' button. The table below has columns for Client ID, Client Name, Client Balance, Don't Send Statement, Last Statement, Last Client Payment, 3rd Party Balance, Primary Plan, and Need Information. The table contains 6 rows of data, all with checkmarks in the first column. An export icon (c) is visible in the top right corner of the page.

Client ID	Client Name	Client Balance	Don't Send Statement	Last Statement	Last Client Payment	3rd Party Balance	Primary Plan	Need Information
1153	01_Client	\$56.00	No			\$89.50	Plan01	No
1096	Asano, Jason	\$313.20	No			\$0.00		No
1078	Banks, Tara	\$142.92	Yes	09/12/2022		\$1,541.26	Medi-Cal/MH	No
1011	Billing, June	\$467.38	No		\$0.00 09/28/2022	\$2,072.72		No
1103	Cinnamon-Crunch, Toast	\$198.00	No			\$0.00		No
1063	Hill, Hank	\$60.60	No			\$0.00		No

## Open a Client's Account

5. Select Active Clients from the drop-down menu
  - a. Click on the client's name you want to work/view

Client Accounts (14)

5

All Clients | All Episode Statuses | Enrolled in Program... | Complete and Incomplete Financial Information | Last Name Begins With... | All Clinicians | Client Balance > 0 | Don't Send Statement | Apply Filter

Select: All, All on Page, None

	Client ID	Client Name	Client Balance	Don't Send Statement	Last Statement	Last Client Payment	3rd Party Balance	Primary Plan	Need Information
<input type="checkbox"/>	1153	<a href="#">01_Client</a>	\$56.00	No			\$89.50	Plan01	No
<input type="checkbox"/>	1096	<a href="#">Asano, Jason</a>	\$313.20	No			\$0.00		No
<input type="checkbox"/>	1078	<a href="#">Banks, Tara</a>	\$142.92	Yes	09/12/2022		\$1,541.26	Medi-Cal MH	No
<input type="checkbox"/>	1011	<a href="#">Billing, June</a>	\$467.38	No		\$0.00 09/28/2022	\$2,072.72		No
<input type="checkbox"/>	1103	<a href="#">Cinnamon-Crunch, Toast</a>	\$198.00	No			\$0.00		No
<input type="checkbox"/>	1063	<a href="#">Hill, Hank</a>	\$60.60	No			\$0.00		No
<input type="checkbox"/>	1109	<a href="#">Lewis, Monica</a>	\$33.60	No			\$2,418.20	Medi-Cal MH	No
<input type="checkbox"/>	1101	<a href="#">Lucky, Charms</a>	\$114.66	No			\$0.00		No
<input type="checkbox"/>	1150	<a href="#">Test, Chalthra</a>	\$50.00	No			\$0.00		Yes
<input type="checkbox"/>	1065	<a href="#">Thomas, LO</a>	\$30.00	No			\$1,660.80	Medi-Cal MH	No
<input type="checkbox"/>	1148	<a href="#">Tim, ClintonR</a>	\$25.00	No			\$0.00		No
<input type="checkbox"/>	1138	<a href="#">Train, Test</a>	\$250.00	No			\$0.00		No

a

## Client's Account Overview Tab

All Hyperlinks are interactive in SmartCare. The Overview and Charge/Payment Summary tabs are Biller's best friend, it has the capabilities of working a clients account without going outside of the screen to search for what you want for your Billing needs. FYI: Keep in mind you can hover over any icon to see what they are.

### 1. Overview tab

a. Current Client Balance	Unpaid Services	Unposted Payments
b. Internal Collections	External Collections	Don't Send Statements
c. 3 <sup>rd</sup> Party Payer Info	Payment History	
d. Financial Information is Complete	Financial Summary	
e. Generate Claims	Post Payments	View Past Statements & Generate Statements

### Hyperlinks:

- f. When you click on the Hyperlink for the Client's Name [Lewis, Monica](#), it will take you to Client's Information Screen. Where you can find Demographics, etc.
- g. When you click on the Hyperlink [\\$33.60](#) it will take you to the Charge/Payment Summary
- h. When you click on the Hyperlink [12/09/2022](#) it will take you to the Payment/Adjustment Posting screen

1

e



Overview

Charge/ Payment Summary

Account Information

Client Name	Lewis, Monica
Financially Responsible	<u>Lewis, Monica</u> <span style="border: 1px solid orange; border-radius: 50%; padding: 2px;">f</span>
Current Client Balance	\$33.60
Unpaid Services <span style="border: 1px solid orange; border-radius: 50%; padding: 2px;">g</span>	\$33.60 <span style="border: 1px solid orange; border-radius: 50%; padding: 2px;">a</span>
Unposted Payments	\$0.00
Last Statement Sent	
Payment Arrangement Amount	0
Client Fund Balance	0

- Internal Collections
- External Collections b
- Don't Send Statement

Reason c

3rd Party Payer Information c

Plan	Balance	Unbilled Amt	>90 Days	Flagged
Medi-Cal MH CIN97665...	\$2,418.20	\$378.45	\$0.00	

Payment History h

Last 30 Days

Show Client Payments Only

Payer	Date	Amount	Check#	Unposted Amount
Medi-Cal MH CIN976656	<u>12/09/2022</u>	\$75.00	4345	\$0.00

Financial Information is Complete

Accounting Notes

d

Financial Summary

Client: Active  
 Current/Most Recent Episode: Episode 1 03/01/2022  
 Current/Most Recent Program: Outpatient MH Adult 04/01/2022  
 Last Seen on Date:  
 Auths  
 Plans  
 Medi-Cal MH - 03/01/2022

## Client's Account Charge/Payment Summary Tab

This is where you can view all the Clients Payments, Adjustments, Balance, Billed, Unbilled, Charges and drill down for each Date of Service on the Ledger Entries.

1. Click on the Charge/Payment Summary
  - a. Select your Filters to work Clients Account
  - b. Click on the DOS you want to work  
The Ledger Entries screen will open

Client Account

Overview **Charge/ Payment Summary** 1

**a**

Show Only Unpaid Services  All Payers  All Clinicians  All Programs  **Apply Filter**

All Services  All Balance  All Dates  From  To

Service Id	DOS <span style="border: 1px solid orange; border-radius: 50%; padding: 2px;">b</span>	Procedure	Charges	Unbilled	Billed	Payments	Adj	Balance
789	<span style="border: 1px solid orange; border-radius: 50%; padding: 2px;">04/11/2022 11:0...</span>	Office or Other Outpati...	\$156.60	\$33.60	\$0.00	\$75.00	\$48.00	\$33.60
		<a href="#">Medi-Cal MH CIN976656</a>	\$123.00	\$0.00	\$0.00	\$75.00	\$48.00	\$0.00
		<a href="#">Client</a>	\$33.60	\$33.60	\$0.00	\$0.00	\$0.00	\$33.60
790	04/18/2022 9:00...	Office or Other Outpati...	\$156.60	\$0.00	\$156.60	\$0.00	\$0.00	\$156.60
		<a href="#">Medi-Cal MH CIN976656</a>	\$156.60	\$0.00	\$156.60	\$0.00	\$0.00	\$156.60

2. Ledger Entries
  - a. Service Information
  - b. Payers, Client balance, Adjustment, and Payments
  - c. Make Adjustments
  - d. Regenerate Charge
  - e. Export
  - f. **Charge Id:** Everywhere in SmartCare is interactive so you can click on the numbers 257 Hyperlink, and it will open a screen where Charges can be Validated, Rebill, Status History and Action History can be Checked
  - g. **Activity:** You can add/modify EOB by clicking on the Hyperlink EOB or you can view/modify a Service by clicking on the Service hyperlink

Ledger Entries 2

Make adjustment to.  **Make Adjustments...** **Regenerate Charge**

**a**

**Service Information**

DOS: 04/11/2022 11:00 AM  
Office or Other Outpatient Visit o  
Procedure: f an Established Patient 60.00 Mi  
nutes  
Charge: \$156.60

**b**

**Payers** **Modify Payer Order...** Total Current Balance : \$33.60

Payer	Charges	UnBilled	Payments	Adj	Balance
Client	\$33.60	\$33.60	\$0.00	\$0.00	\$33.60
Medi-Cal ...	\$123.00	\$0.00	(\$75.00)	(\$48.00)	\$0.00

**c** **d** **e**

View Ledgers For: All Payers f  Exclude Error Ledgers g

Financial Activity Line ID	Service Id	Charge Id	Date	Activity	Payer	Type	Adj. Code	Amount	Check#	Reason Codes/Desc	Remittance Advice Remark Codes/Desc
<input checked="" type="checkbox"/> 274	789	<span style="border: 1px solid orange; border-radius: 50%; padding: 2px;">257</span>	11/10/2022	<input checked="" type="checkbox"/> <a href="#">Servic...</a>	Medi-Cal MH C...	Cha...		\$156.60			
<input checked="" type="checkbox"/> 461	789	<span style="border: 1px solid orange; border-radius: 50%; padding: 2px;">257</span>	12/09/2022	<input checked="" type="checkbox"/> <a href="#">EOB/P...</a>	Medi-Cal MH C...	Pay...		(\$75.00)	4345		
	461	<span style="border: 1px solid orange; border-radius: 50%; padding: 2px;">257</span>	12/09/2022	<input checked="" type="checkbox"/> <a href="#">EOB/P...</a>	Medi-Cal MH C...	Adj...	WO Wr...	(\$48.00)	4345		
	461	<span style="border: 1px solid orange; border-radius: 50%; padding: 2px;">257</span>	12/09/2022	<input checked="" type="checkbox"/> <a href="#">EOB/P...</a>	Medi-Cal MH C...	Tra...	PR Col...	(\$33.60)	4345		

# Identifying Billing Errors

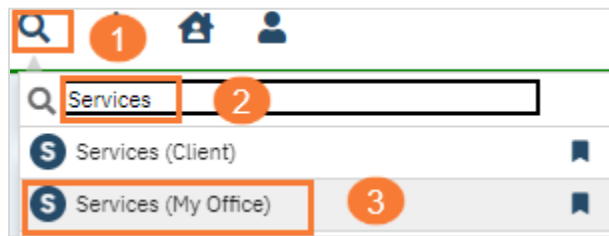
This section will help Billers identify some billing errors they may encounter and how to fix them.

**Note:** Once errors are corrected, they will go through the overnight process. However, if you want to create claims right away, you can do so by following the “Bypass overnight process.”

Error Type	Error Message
4410	Financial information has not been completed for this client.
4402	Must have a signed note before completing a service.
4403	Unable to find a matching rate for the selected procedure.
4404	Billing diagnosis required for completing the service.

## How to Identify and Fix Billing Errors

1. Click on the Search icon
2. Type Services
3. Click on Services (My Office)



4. Select Show from the drop-down menu
  - a. Select a Date Range for the DOS From and DOS To field
  - b. Click Apply Filter

Services (167)

Select Action [dropdown] ☆ ★ ⬇ ⚙ ×

All Services  Show  Include Do Not Complete  All Programs  Financial Assignment...

All Locations  All Procedure Codes  All Clinicians  All Entry Staff  All Service Areas

Service Id  Entered From  Entered To  DOS From: 03/07/2022  DOS To: 12/03/2022

Include Services created from Claims  Only include Services with Add On Codes  Only show Non-Billable Services

Client Name  Organizational Hierarchy...

Select: All, All on Page, None

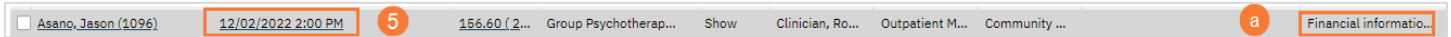
Client Name	DOS	Units	Charge (Rate Id)	Procedure	Status	Clinician	Program	Location	Comment	Failure to Complete Reason(s)	Add On Code
<input type="checkbox"/> Test, Madhu (1147)	12/02/2022 3:10 PM			Madhu test Procedure	Show	Zunjarwad, ...	Test Progra...	Madhu test L...		Must have a signed ...	
<input type="checkbox"/> Test, Madhu (1147)	12/02/2022 3:00 PM			Madhu test Procedure	Show	Zunjarwad, ...	Test Progra...	Madhu test L...		Must have a signed ...	
<input type="checkbox"/> Asano, Jason (1096)	12/02/2022 2:00 PM		156.60 (2...	Group Psychotherap...	Show	Clinician, Ro...	Outpatient M...	Community ...		Financial informatio...	
<input type="checkbox"/> Childers, Cindy (1080)	12/02/2022 2:00 PM		156.60 (2...	Group Psychotherap...	Show	Clinician, Ro...	Outpatient M...	Community ...		Billing diagnosis req...	
<input type="checkbox"/> Powers, Light (1070)	12/02/2022 2:00 PM		156.60 (2...	Group Psychotherap...	Show	Clinician, Ro...	Outpatient M...	Community ...		Billing diagnosis req...	
<input type="checkbox"/> Tommy, Max (1091)	12/02/2022 2:00 PM		156.60 (2...	Group Psychotherap...	Show	Supervisor, C...	Outpatient M...	Community ...		Must have a signed ...	
<input type="checkbox"/> White, Walter (1038)	12/02/2022 2:00 PM		156.60 (2...	Group Psychotherap...	Show	Supervisor, C...	Outpatient M...	Community ...		Must have a signed ...	
<input type="checkbox"/> Williams, Kyle (1046)	12/02/2022 2:00 PM		156.60 (2...	Group Psychotherap...	Show	Supervisor, C...	Outpatient M...	Community ...		Must have a signed ...	
<input type="checkbox"/> Owens, Sandra (1088)	12/02/2022 8:30 AM			Comprehensive com...	Show	Williams, La...	Outpatient M...	Community ...		Unable to find a mat...	
<input type="checkbox"/> Train, Test (1138)	12/01/2022 7:00 PM		80.00 (92...	Procedure01	Show	New, Staff01	Program01	Location01		Billing diagnosis req...	
<input type="checkbox"/> Asano, Jason (1096)	12/01/2022 3:00 PM		156.60 (2...	Group Psychotherap...	Show	Clinician, Ro...	Outpatient M...	Community ...		Must have a signed ...	

## Error Type: 4410 Financial information has not been completed for this client

This error happens when the “Financial Information is Complete” box is not selected on Client Account Screen. The reason this is necessary for creating charges to send to the Payer electronically or you can print on paper.

To fix this error follow the below steps:

5. Click on the DOS for this client
  - a. Financial information has not been completed for this client
  - b. The Service Detail Screen will open displaying the Warnings/Errors Message



Asano, Jason (1096)

Service Detail

Service Detail
Billing Diagnosis
Authorization(s)

**Service**

**Client...** Asano, Jason      **Status** Show      **Start Date** 12/02/2022      **Program** Outpatient MH Adult

**Procedure** Group Psychotherapy (Other Than of a M      **Modifier...**      **Start Time** 2:00 PM      **Total Duration** 60   
 Minutes

**Clinician Name** Clinician, Robert      **End Date** 12/02/2022

**Location** Community Mental Health Center      **Attending**      **Referring**

**Client was present**      **Other Person(s) Present**      **Cancel Reason**

**Group...** Process Group      **Charge** \$156.60      **Balance**      **Rate ID** 207

**Billable**       **Do Not Complete**

**Travel Time**      Minutes      **Note** 7075554567

**Face to Face Time**      Minutes

**Documentation Time**      Minutes

**Evidence Based Practices**       **Override Charge Amount**      **Overridden By**

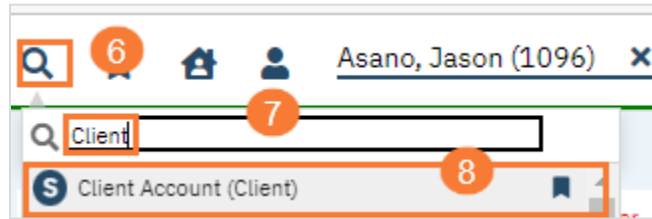
**Transportation Service** No       **Override Errors**      **Overridden By**

**Interpreter Services Needed**

**Warnings / Errors**

Date	Error Type	Error Message	Next Step
12/04/2022 01:00 AM	4410	Financial information has not been completed for this client.	

6. Click on the Search icon
7. Type Client
8. Click on Client Account (Client)



9. Select the box to add a checkmark on Financial Information is Complete.
  - a. Click on X to close

10. Service Detail Screen, No longer have the Warnings/Error Message

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Asano, Jason (1096)
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## Service Detail

Service Detail

Billing Diagnosis

Authorization(s)

### Service ❗

**Client...** Asano, Jason

**Procedure** Group Psychotherapy (Other Than of a M Modifier...

**Clinician Name** Clinician, Robert

**Location** Community Mental Health Center

**Client was present**

**Group...** Process Group

**Billable**  **Do Not Complete**

**Travel Time**  Minutes

**Face to Face Time**  Minutes

**Documentation Time**  Minutes

**Evidence Based Practices** [v]

**Transportation Service** No

**Status** Complete

**Start Date** 12/02/2022

**Start Time** 2:00 PM

**Attending** [v]

**Other Person(s) Present** [v]

**Charge** \$156.60

**Override Charge Amount**

**Override Errors**

**Interpreter Services Needed**

**Program** Outpatient MH Adult

**Total Duration** 60 Minutes

**End Date** 12/02/2022

**Referring** [v]

**Cancel Reason** [v]

**Balance** \$ 156.60

**Rate ID** 207

**Overridden By** [v]

**Overridden By** [v]

**Note** 
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7075554567

### Warnings / Errors 10

Date	Error Type	Error Message	Next Step
No data to display			



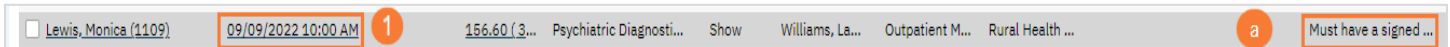
## Error Type: 4402 Must have a sign note before completing the service

There are 2 different reasons that will cause this error to occur

- The Narrative Note was not documented or
- The Service Note was not signed

To fix this error follow the below steps:

1. Click on DOS
  - a. Error message Must have a sign note before completing the service
  - b. The Service Detail Screen will open displaying the Warnings/Errors Message



Service Detail

Service Detail | Billing Diagnosis | Add-On Codes | Authorization(s)

Service

Client... Lewis, Monica Status Show Start Date 09/09/2022 Program Outpatient MH Adult

Procedure Psychiatric Diagnostic Evaluation Modifier... Start Time 10:00 AM Total Duration 60 Minutes

Clinician Name Williams, LaQuita End Date 09/09/2022

Location Rural Health Clinic Attending Referring

Client was present Other Person(s) Present Cancel Reason

Group... Charge \$156.60 Balance Rate ID 345

Billable  Do Not Complete

Travel Time Minutes Note (818) 233-4333 3

Face to Face Time Minutes

Documentation Time Minutes

Emergency Indicator No  Override Charge Amount Overridden By

Evidence Based Practices  Override Errors Overridden By

Transportation Service No  Interpreter Services Needed

Warnings / Errors

Date	Error Type	Error Message	Next Step
12/05/2022 01:00 AM	4402	Must have a signed note before completing a service.	

2. From your left navigation menu. **Navigate to the following path:**
  - a. **Hover over Client**
  - b. **Scroll to Hover over Clinical Documents**
  - c. **Scroll down to Click on Service Notes**

The screenshot shows the SmartCare interface for a client named Lewis, Monica (1109). The left navigation menu is expanded, and the 'Client' item is highlighted with an orange box and a red circle containing the letter 'a'. The 'Clinical Documents' item is also highlighted with an orange box and a red circle containing the letter 'b'. The 'Services/Notes' item is highlighted with an orange box and a red circle containing the letter 'c'. The main content area shows the 'Service Detail' page with various tabs and a list of services.

Client Activity Tracker	Service Detail	Billing Diagnosis	Add-On Codes	Authorization
Client Clinical Problems	Appointments For Today			
My Office	Assessment/Screening Tools		Status	Show
<b>Client</b>	Client Dashboard		Stastic Evaluation	Modifier...
Administration	<b>Clinical Documents</b>		Mental Status Exam	
Client Funds	Mental Status		Safety Crisis Plan	
Full Service Partnership Client Tracking List Page	Treatment Episode		Weekly Note	
Client Clinical Problem Details	BQuIP Show/Hide - Brief Questionnaire for Initial Placement		Discharge Summary	
SmartLinks	BQuIP, Basic Show/Hide - Brief Questionnaire for Initial Placement		Clinical Information Reconciliation	
	BQuIP, Enable/Disable - Brief Questionnaire for Initial Placement		Discharge	
	Visit Summary		Family History	
	Inpatient/Residential		Safety/Crisis Plan	
	Special Populations		Goals And Objective Plan History	
	My Dashboard		Social, Psychological, and Behavior Data	
	My Calendar		Individualized Service Plan	
	Client Inquiries		Individualized Service Plan Review	
	Client Education Resources		<b>Services/Notes</b>	<b>Services/Notes</b>
			Summary of Care	

3. Click on DOS 09/09/2022

Services/Notes (17)

All Clinicians All Statuses All Procedures Other Apply Filter

Show Services and Care Mgmt Claims Past 12 Months From 12/05/2021 To All Programs

Include Services created from Claims  Only include Services with Add On Codes

Auth	DOS	Status	Document	Group Name	Procedure	Clinician	Program
	12/09/2022 11:30 AM	Complete	<a href="#">Narrative</a>		Comprehensive Multidisciplinary Evaluation ...	Williams, LaQuita	Outpatient MH Adult
	12/01/2022 08:00 AM	Complete	<a href="#">Narrative</a>		Comprehensive Multidisciplinary Evaluation ...	Williams, LaQuita	Outpatient MH Adult
	11/17/2022 10:00 AM	Complete	<a href="#">Narrative</a>		Comprehensive Multidisciplinary Evaluation ...	Williams, LaQuita	Outpatient MH Adult
	11/16/2022 11:00 AM	Complete	<a href="#">Narrative</a>		Nursing Assessment/Evaluation 60.00 Minutes	Williams, LaQuita	Outpatient MH Adult
	11/15/2022 09:00 AM	Complete	<a href="#">Narrative</a>		Gabapentin 15.00 Units	Williams, LaQuita	Outpatient MH Adult
	11/14/2022 11:00 AM	Complete	<a href="#">Narrative</a>		Office or Other Outpatient Visit of an Establis...	Williams, LaQuita	Outpatient MH Adult
	11/11/2022 10:00 AM	Complete	<a href="#">Narrative</a>		Crisis Intervention Services, per 15 minutes ...	Brydon, Jennie	Outpatient MH Adult
	11/03/2022 10:00 AM	Complete	<a href="#">Narrative</a>		Crisis Intervention Services, per 15 minutes ...	Brydon, Jennie	Outpatient MH Adult
	10/28/2022 09:00 AM	Complete	<a href="#">Narrative</a>		Interpretation or Explanation of Results of Ps...	Williams, LaQuita	Outpatient MH Adult
	10/07/2022 10:00 AM	Complete	<a href="#">Narrative</a>		Psychotherapy with Patient 90.00 Minutes	Williams, LaQuita	Outpatient MH Adult
	09/09/2022 10:00 AM	Show	<a href="#">Narrative</a>		Psychiatric Diagnostic Evaluation 60.00 Minu...	Williams, LaQuita	Outpatient MH Adult

4. Click on Note tab

Misc Note

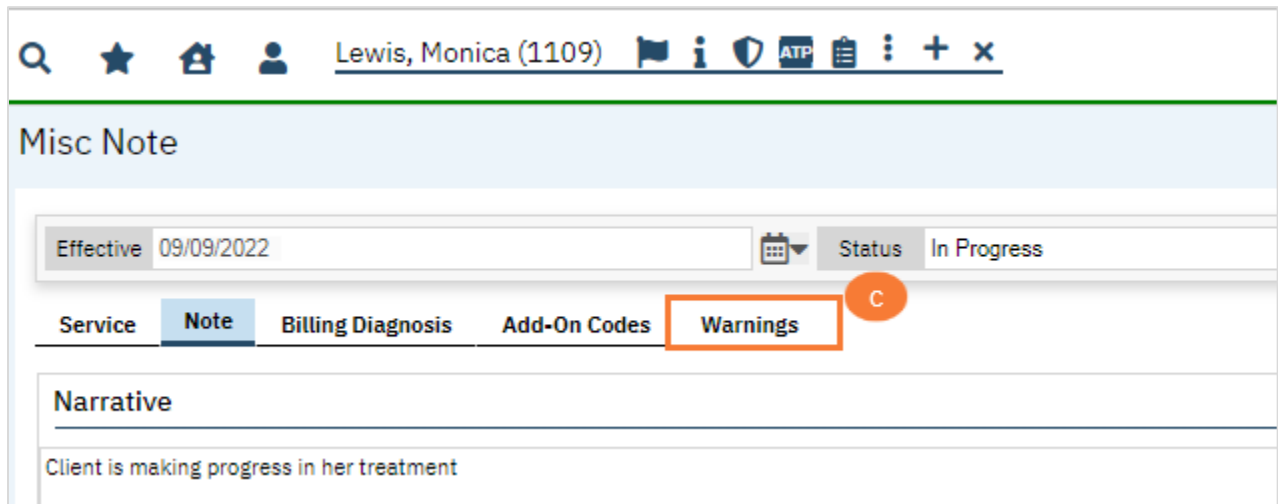
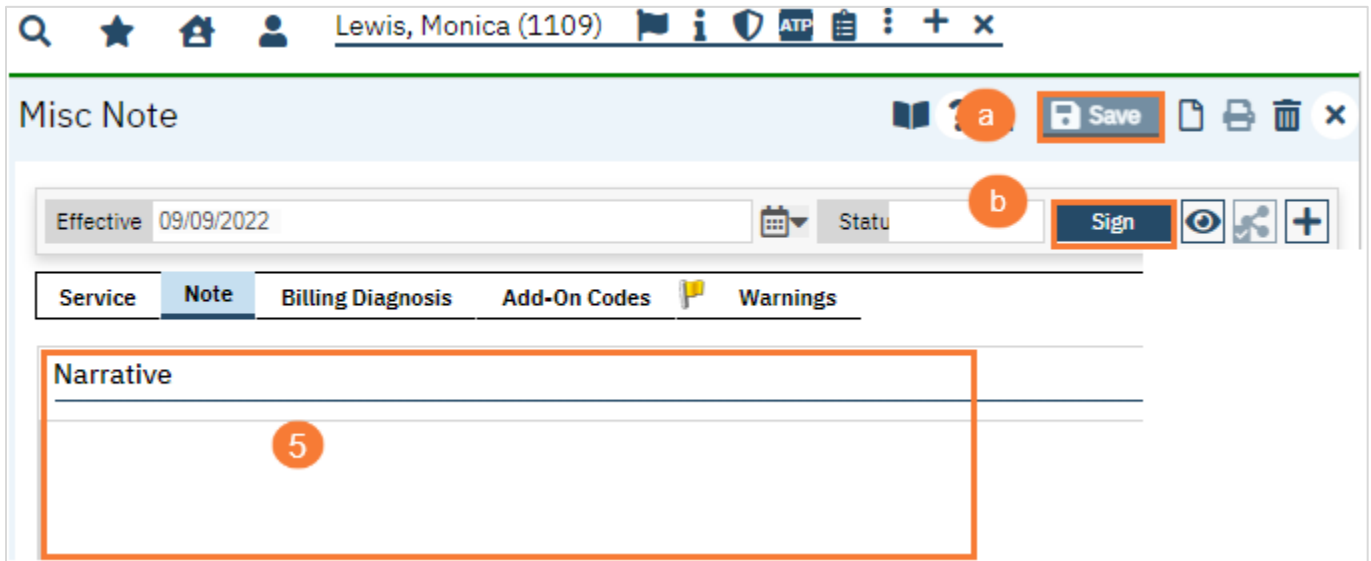
Effective 09/09/2022 Status In Progress

Service **Note** Billing Diagnosis Add-On Codes Warnings

Service

Status	Show	Start Date	09/09/2022
Program	Outpatient MH Adult	Start Time	10:00 AM
Procedure	Psychiatric Diagnostic Evaluation	Travel Time	Minutes
Location	Rural Health Clinic	Face to Face Time	Minutes
Clinician	Williams, LaQuita	Documentation Time	Minutes
Cancel Reason		Total Duration	60 Minutes
Evidence Based Practices		Attending	
		Referring	
		Emergency Indicator	No

5. Type a note in the Narrative box
  - a. Click Save
  - b. Click Sign
  - c. Warnings Flag is now gone



### Error Type: 4404 Billing Diagnosis Required Before Completing the Service

This Error was generated because there was no Diagnosis attached to this Date of Service. All Services must have a Billing Diagnosis.

To fix the error follow the below steps:

1. Click on DOS
  - a. Error message Billing diagnosis required before completing the service
  - b. The Service Detail Screen will open displaying the Warnings/Errors Message

## Service Detail

Service Detail Billing Diagnosis Authorization(s)

**Service**

Client... Asano, Jason Status Show Start Date 11/15/2022 Program Outpatient MH Adult

Procedure Therapeutic Behavioral Services Modifier... Start Time 2:00 PM Total Duration 60 Minutes

Clinician Name Clinician, Robert End Date 11/15/2022

Location Office Attending Referring

Client was present Other Person(s) Present Cancel Reason

Group... Charge \$156.60 Balance Rate ID 431

Billable  Do Not Complete

Travel Time Minutes Note 7075554567

Face to Face Time Minutes

Documentation Time Minutes

Evidence Based Practices Multisystemic Therapy

Transportation Service No

Override Charge Amount Overridden By

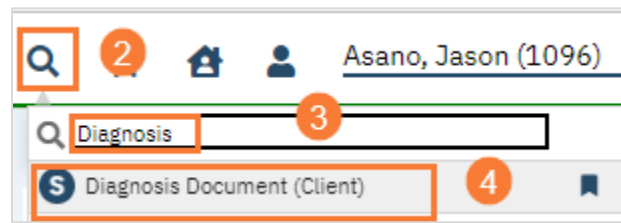
Override Errors Overridden By

Interpreter Services Needed

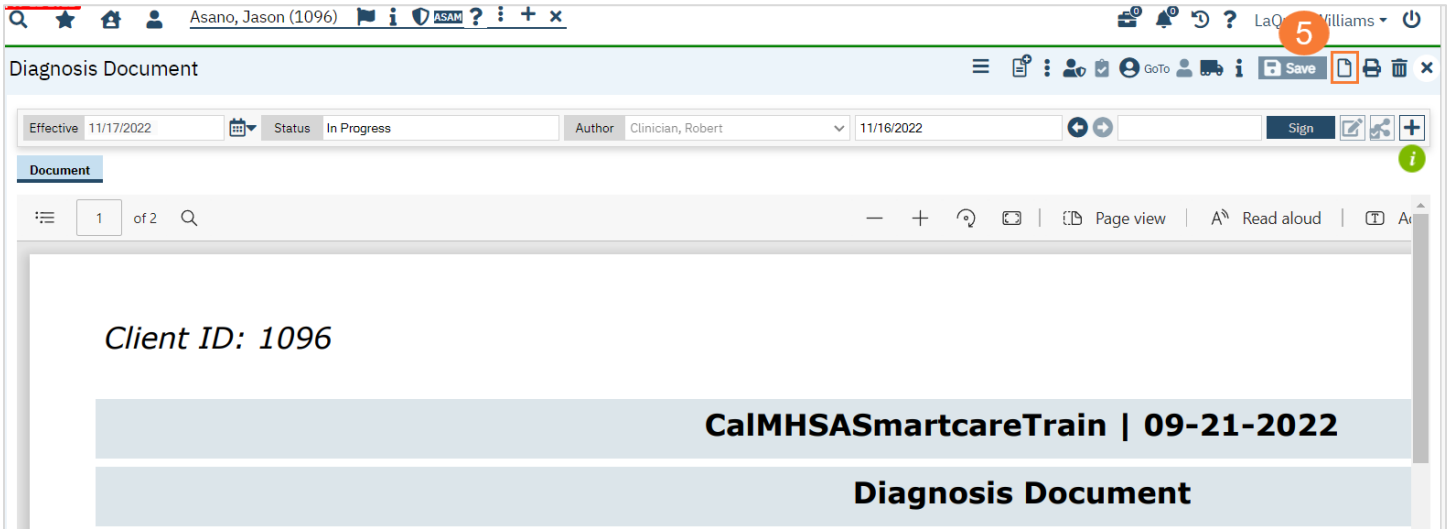
**Warnings / Errors**

Date	Error Type	Error Message	Next Step
12/05/2022 01:00 AM	4404	Billing diagnosis required for completing the service.	

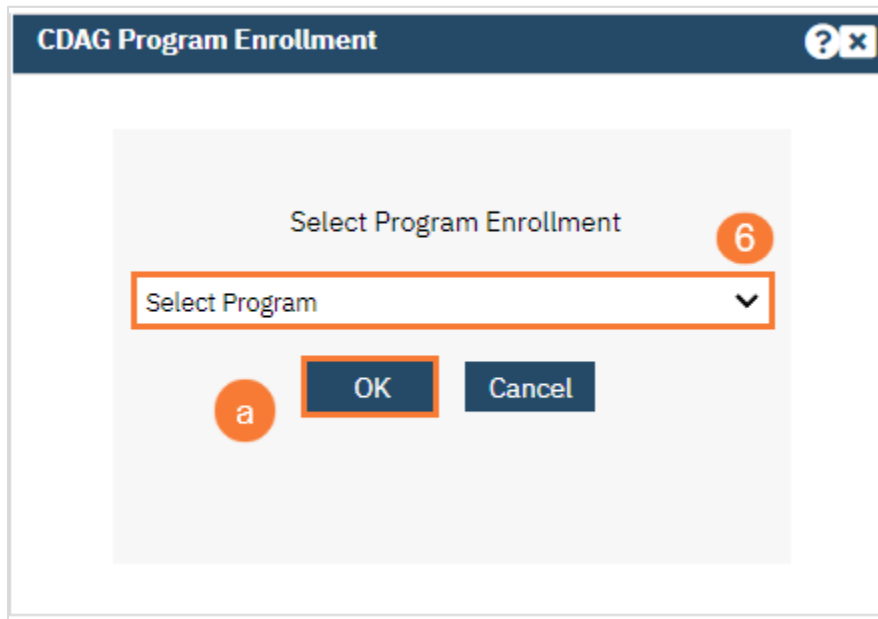
2. Click on the Search icon
3. Type Diagnosis
4. Click on Diagnosis Document (Client)



5. Click on the New icon to add a New Diagnosis



6. Select the appropriate CDAG Program Enrollment from the drop-down menu
  - a. Click OK



7. Select the appropriate Effective Date that corresponds with the Service
  - a. Type in Diagnosis code or Type Description
  - b. Click on the Diagnosis you want from the list
  - c. Select if this Diagnosis is Primary, Additional, or Provisional from the Type drop-down menu
  - d. Click Insert
  - e. Click Save
  - f. Click Sign

Effective  Status

**Diagnosis**

No Diagnosis

**Diagnosis**

Code  Description

F20.0 - Paranoid schizophrenia - 111482003 - Subchronic schizophrenia with acute exacerbations (disorder)

F20.0 - Paranoid schizophrenia - 191531007 - Acute exacerbation of chronic schizophrenia (disorder)

Rule Out

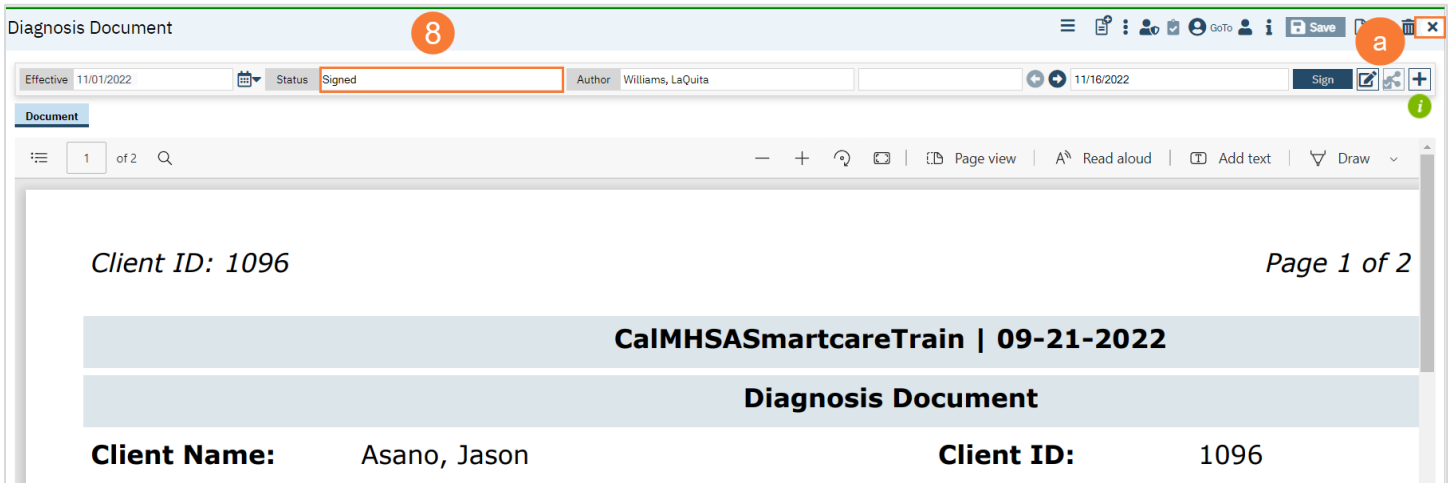
Severity  Order  Billable  Yes  No

Comments

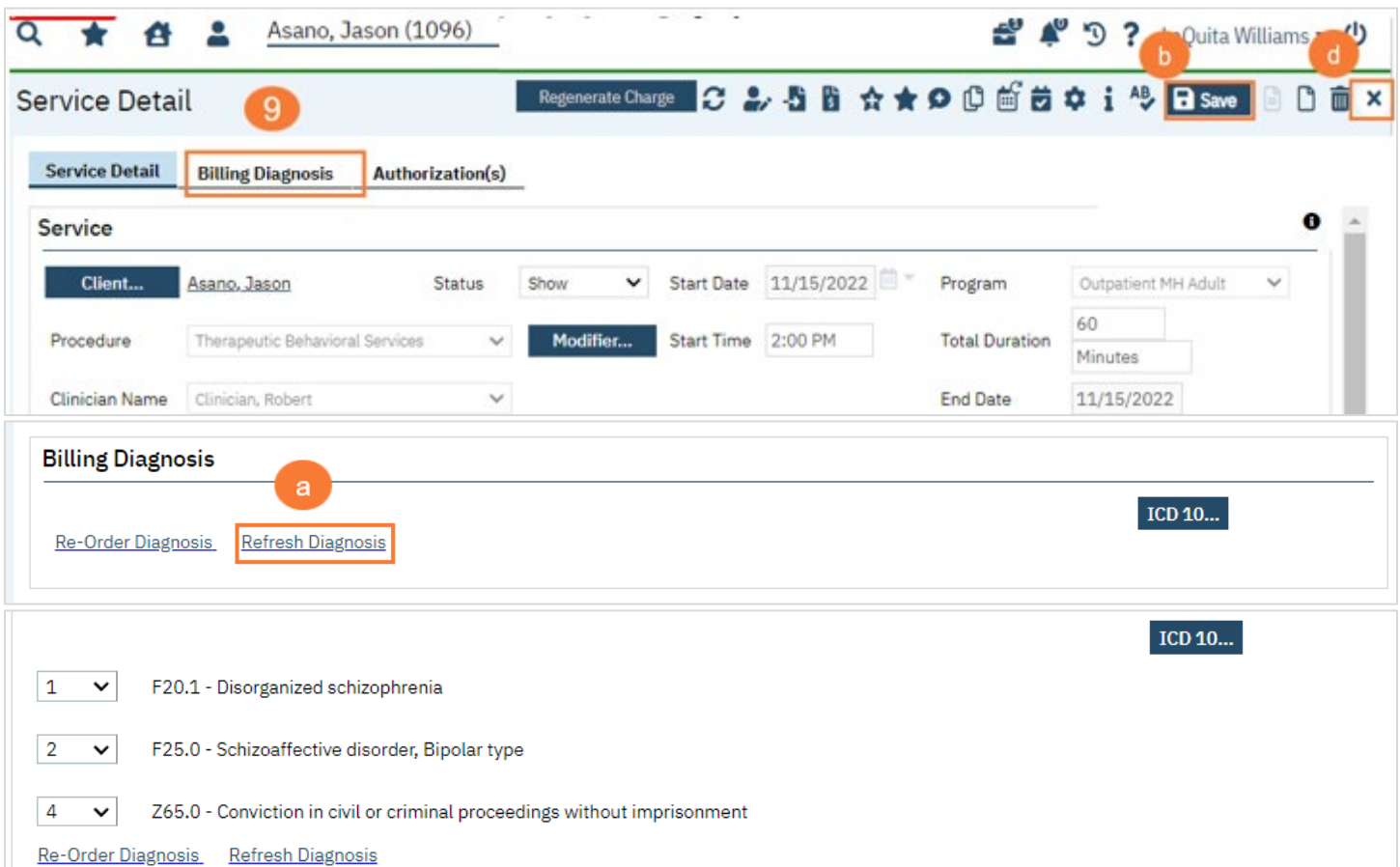
**Diagnosis List**

			Order	DSM 5/ ICD 10	SNOMED	R/O	ICD/ DSM Description	SNOMED Description	Type	Severity	Source	Comments
X	<input type="radio"/>	<input type="radio"/>	2	F25.0	271428...		Schizoaffective dis...	Schizoaffective dis...	Additional	Moderate		
X	<input type="radio"/>	<input type="radio"/>	4	Z65.0	11418007		Conviction in civil o...	Legal prosecution (...)	Additional			

8. A signed PDF Diagnosis document will appear
  - a. Click on the X to close



9. Click Billing Diagnosis tab
  - a. Click on Refresh Diagnosis this will show all Diagnosis
  - b. Click Save
  - c. Click on Service Detail tab, notice the Billing Diagnosis error is gone
  - d. Click on the X to close





Service Detail

Service Detail | Billing Diagnosis | Authorization(s)

Service

Client... Asano, Jason Status Show Start Date 11/15/2022 Program Outpatient MH Adult

Procedure Therapeutic Behavioral Services Modifier... Start Time 2:00 PM Total Duration 60 Minutes

Clinician Name Clinician, Robert End Date 11/15/2022

Location Office Attending Referring

Client was present Other Person(s) Present Cancel Reason

Group... Charge \$156.60 Balance Rate ID 431

Billable  Do Not Complete

Travel Time Minutes Note 7075554567

Face to Face Time Minutes

Documentation Time Minutes

Evidence Based Practices Multisystemic Therapy  Override Charge Amount Overridden By

Transportation Service No  Override Errors Overridden By

Interpreter Services Needed

Warnings / Errors

Date	Error Type	Error Message	Next Step
No data to display			

## Error Type: 4403 Unable to find a matching rate for the procedure or Missing billing procedure rate

This error occurs when there is no rate associated with the specified Service Area, in this case Service Area DMC needs to have a cross reference rate created.

To fix the error follow the below steps:

1. Click on the Hyperlink Evaluation
  - a. The Procedure Code Detail Screen will open

<input type="checkbox"/>	396	Medi-Cal DMC	Xavier, Angela (10...	12/04/2022 01:...	Williams, LaOu	1	Evaluation	\$78.16	\$78.16	78.16
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Procedure Code Details

General | Rates/ Billing Codes | Programs/ Credentials | Add-On Procedure Codes | CQM Configurations | Bundle Codes | Reporting | Custom Fields

Code Information

Name Evaluation Display As Evaluation

Active  Allow Decimals (2 Places) Entered As Minutes

Rules Reporting Information

2. Click on the Rates/Billing Codes tab
  - a. Click on the circle next to the DOS
  - b. Click Modify

Procedure Code Details

**2**

General **Rates/ Billing Codes** Programs/ Credentials Add-On Procedure Codes CQM Configurations Bundle Codes Reporting Custom Fields

**Rate**

Rate ID  Code  Evaluation  From  To

Charge  Per  Priority

Program(s)...  Location(s)...  Degree(s)...

Staff...  Client...  Service Area(s)...

Client Present  Client Not Present  N/A Place of Service...  Modifiers...

Age Group...

**Standard Billing Code**

Standard Billing Code   Add Modifiers From Service  Claim Unit

Standard Revenue Code  Rev Code Description  **Advanced...**

National Drug Code  Drug Unit Type  Drug Units Per Service

Comment

**b**

**Rate List**  Show only those rates that are currently effective.

**a**

	From	To	Charge	Billing Code	Rev Code	National Drug Code	Drug Unit Type	Drug Units Per Service	Program
<input checked="" type="checkbox"/>	03/07/2022		\$19.5400	H0023					

3. Click on the box next to Medi-Cal DMC to add a checkmark
  - a. Click Save

CoveragePlansPopUp

Associate Billing Codes with Selected Plan(s) **a**

<input checked="" type="checkbox"/>	Jacob's Test Plan (Inactive plan)
<input type="checkbox"/>	Medi-Cal DMC <b>3</b>
<input checked="" type="checkbox"/>	Medi-Cal MH

4. Click Save
  - a. Click on the X to close

Procedure Code Details

**4**

General **Rates/ Billing Codes** Programs/ Credentials Add-On Procedure Codes CQM Configurations Bundle Codes Reporting Custom Fields

Charge  Per  Minutes  Priority

Program(s)...  Location(s)...  Degree(s)...

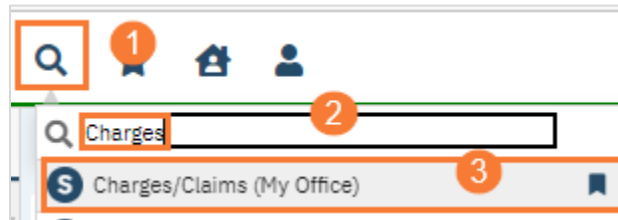
**a**

# Delay Services for Various Reasons

This section is to walk Billers how to Delay Services you may not want to bill for various reasons.

## How to add a Delay Reason

1. Click on the Search icon
2. Type Charges
3. Click on Charges/Claims (My Office)



4. Select your parameters
  - a. Select Ready to Bill from the drop-down menu
  - b. Select Show unbilled charges from the drop-down menu
  - c. Enter a Date Range in the DOS From and Dos To field
  - d. Click Apply Filter This will apply all the parameters you selected
  - e. Select All or Click only on the services you want to process
  - f. Click on Select Action Drop down menu
  - g. Select Add Delay Reason from the drop-down menu
  - h. Add Delay Reason Pop-up box appear, Select Delay Reason from the drop-down menu
  - i. Click OK

Charges/Claims (34) 4 Select Action

All Payer Types  Payers  All Plans  Financial Assignment...

Ready To Bill Only  Priorities  All Programs  All Procedure Codes

Show unbilled charges  Service Area  Capitated/ Non Capitated  All Error Reasons

All Locations  of client statements since charge cre...

Charge Creation From  Charge Creation To

Service ID  Charge ID  Batch  All Clinicians

Client ID  DOS From 10/01/2022  DOS To 12/15/2022  Processed From  Processed To

Show charges with balance  Show charges with credit balance  Included Error Services  Show charges in Internal Collections

Exclude from Work Queue  Not counted toward Work Queue Productivity  Show charges with balances greater than zero

Show \$0 Balance Paid Charges

Apply Filter

Select Action

Add Delay Reason

- Add to External Collections
- Add to Internal Collections
- Batch Update Billing Code and Revenue Code
- Mark as Do Not Bill
- Mark as Flagged
- Mark as Rebill
- Mark claim line To Be Replaced
- Mark claim line To Be Voided
- Mark Ready to Bill
- Remove Flagged
- Remove from Do Not Bill
- Remove from Internal Collections
- Remove from Ready to Bill
- Remove from Rebill
- Remove from To Be Replaced
- Remove from To be Voided

Select All, All on Page, None Charges To

	Charge Id	Plan	Δ	Client Name	DOS	Clinician	Procedure Name	Charge	Balance	Unbilled	Paid Amt	Bill Date
<input checked="" type="checkbox"/>	335			Test, Chaithra (11...	12/01/2022 04:...	Kunjilana, Chaithra	EM Est. Pt. Lvl...	\$50.00	\$50.00			
<input checked="" type="checkbox"/>	336			Train, Test (1138)	12/01/2022 12:...	Tg, Sahana	Procedure123	\$250.00	\$100.00			
<input checked="" type="checkbox"/>	342			Tim, ClintonR (11...	11/28/2022 01:...	Shafiq, Syed	TestProcedure	\$25.00	\$25.00			
<input checked="" type="checkbox"/>	344			Train, Test (1138)	12/01/2022 04:...	Testing, Staff	PAT Procedure	\$35.00	\$35.00			

