



Delay Reason Codes 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 complete each workflow in a step-by-step format with related screenshots that will make understanding how to complete each workflow easy. Through this guide, you will learn about SmartCare's comprehensive suite of tools and advanced technologies to enter client data securely and efficiently.

We hope that by following these instructions you will gain a better understanding of the capabilities of SmartCare so that you can start using the system right way with confidence.

Audience

This manual is intended for use by anyone who will use the SmartCare EHR to support Specialty Mental Health Services or Substance Use Disorder billing documentation.

Computer Literacy Assumptions for Understanding this User Manual

- 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:

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.

LMS Related Support:

Please email: moodle@calmhsa.org

Delay Reason Codes

Medi-Cal will deny claims if the DRC and DRC Control Identifier Number Information isn't submitted in the claim file when appropriate.

Medi-Cal requires claims to be submitted within a specific number of days. If claim submission is delayed for reasons beyond the county's control, the county can submit a DRC with the claim. In addition to the DRC, the county also needs to submit the DRC Control Identifier Number (provided by Medi-Cal) in the PWK loop/segments of the claim file. Medi-Cal will then consider the claim for payment.

In order to submit a DRC and DRC Control Identifier Number, the counties must submit a request for the codes to Medi-Cal. This request is submitted as an Excel spreadsheet to MedCCC via email. MedCCC will then respond and provide the applicable DRC and DRC Control Identifier Number.

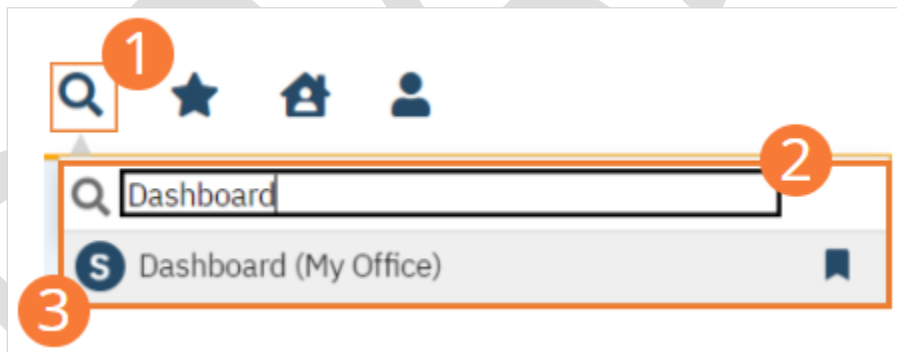
How Do I Add Delay Reason Codes and Supplemental Information?

There are multiple ways to identify charges that have the Timely Filing Plan rules charge errors so that a DRC and supplemental information can be added for billing.

- From the Dashboard: Warnings, Errors, Flags
- From the Charges/Claims Screen

Dashboard: Warnings, Errors, Flags widget

1. Click the Search icon.
2. Type "Dashboard" in the Search bar.
3. Click to select "Dashboard (My Office)" from the search results.



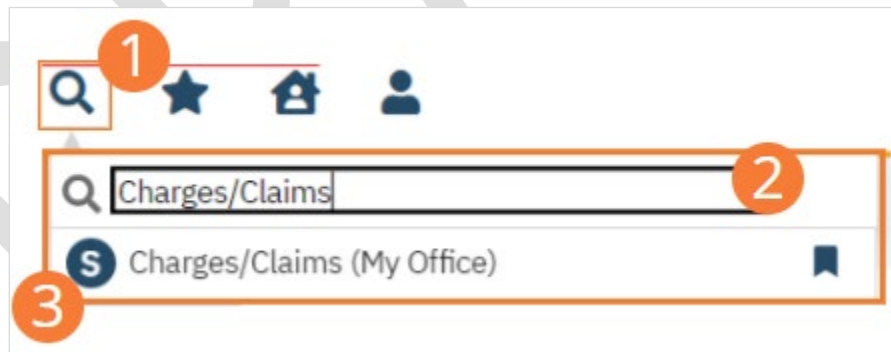
4. The Dashboard screen will open.
5. Locate the Warnings, Errors, Flags widget. Select the charges hyperlink.

A screenshot of a dashboard interface. The title bar says "Dashboard" (labeled 4). On the left is a "Caseload" widget with a table. On the right is a "Warnings, Errors, Flags" widget (labeled 5) with a dropdown menu set to "Select Assignment...". Below the dropdown, there are three rows: "Services" with a value of 755, "Charges" with a value of 4 (labeled 5), and "Claims" with a value of 4. The "Charges" value is highlighted with a red box. In the top right corner of the dashboard, there are icons for a document, a plus sign, a "Save" button, and a close button (X).

6. The Charges/Claims screen will open. Skip to step four in the Charges/Claims section below for next steps.

Charges/Claims Screen

1. Click the Search icon.
2. Type "Charges/Claims" in the Search bar.
3. Click to select "Charges/Claims (My Office)" from the search results.



4. The Charges/Claims screen will open. Set filters to All Charges (Ready to bill or not), Show charges with errors, and Timely Filing Error.
5. Click the Apply Filter button.
6. Select the checkbox next to the Charge ID column.

Charges/Claims (4) Select Action

All Payer Types All Payers All Plans Financial Assignment... Apply Filter **5**
 All Charges (ready to bill or not) Priorities All Programs All Procedure Codes
 Show charges with errors All Service Area Capitated/ Non Capitated Timely Filing Error
 All Locations # of client statements since charge cre...

Charge Creation From Charge Creation To Claim Line Item ID Payer Claim #
 Service ID Charge ID Process ID Batch All Clinicians
 Client ID DOS From 01/01/2023 DOS To 04/24/2023 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 \$0.00 Balance Total \$0.00

Charge ID	Plan	Client Name	DOS	Clinician	Procedure Name	Charge	Balance	Unbilled	Paid Amt	Bill Date	Flagged
<input type="checkbox"/> 2771	Medi-Cal/DC	Adia, Roberto CG...	01/01/2023 01/01/2023	WELCH, JACOB	Behavioral Se...	\$491.20	\$491.20	\$491.20			
<input type="checkbox"/> 2906	Medi-Cal/DC	Acosta, Brandon...	01/01/2023 01/01/2023	ADRIENSTRA, BOB...	Adult Respon...	\$190.44	\$190.44	\$190.44			
<input type="checkbox"/> 488	Medi-Cal/DC	Pham, Julie TEE...	01/01/2023 01/01/2023	WILLIAMS, DEBB...	Medication M...	\$471.20	\$471.20	\$471.20			
<input type="checkbox"/> 484	Medi-Cal/DC	Hernandez, Maria...	01/01/2023 01/01/2023	WILLIAMS, DEBB...	Medication M...	\$471.20	\$471.20	\$471.20			

7. In the Select Action dropdown, select Add Delay Reason from the dropdown.

Select Action **7**

Select Action

Add Delay Reason

Add Supplemental Information

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

8. The DRC popup window will open. Select the applicable DRC.

9. Click the OK button.



10. To Add Supplemental Information, select the checkbox next to the Charge ID column.

11. In the Select Action dropdown, select Add Supplemental Information from the dropdown.

Charge ID	Plan	Client Name	DOS	Clinician	Procedure Name	Charge	Balance	Unbilled	Paid Amt	Bill Date	Flagged
1111	Med-Cal/CC	Adia, Adina, CO...	01/01/2023	WILLIAMS, DENI...	Medication M...	\$471.30	\$471.30	\$471.30			
1112	Med-Cal/CC	Acosta, Brandon...	01/01/2023	ADMINISTRATOR...	Admin Services...	\$190.44	\$190.44	\$190.44			
1113	Med-Cal/CC	Flann, Julia, TSI...	01/01/2023	WILLIAMS, DENI...	Medication M...	\$471.30	\$471.30	\$471.30			
1114	Med-Cal/CC	Herrero, Maria...	01/01/2023	WILLIAMS, DENI...	Medication M...	\$471.30	\$471.30	\$471.30			

12. The Add Supplemental Information Pop up will open. **Type ID** in the ID text field. The ID is equal to the MedCCC provided DRC Control Identifier Number.

13. **Click Type** in the Type dropdown. Type is equal to CT-Support for Delay Reason Codes; this goes in the PWK 01 segment in the claim file.

14. **Click Transmission Code** in the Transmission Code dropdown. Transmission Code is equal to EM; this goes in the PWK 02 segment in the claim file.

15. **Click the OK button.**

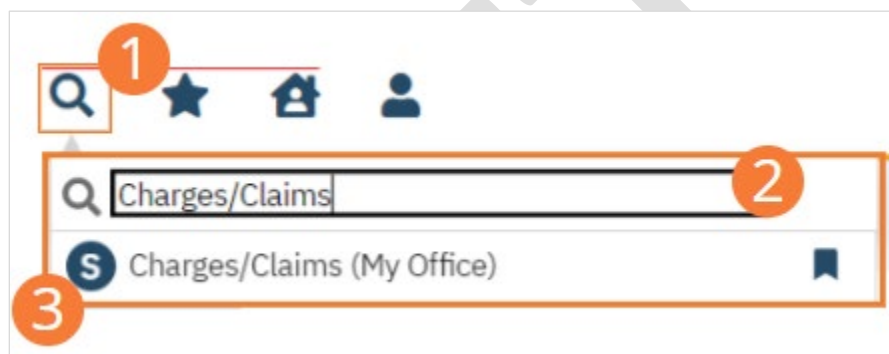
Add Supplemental Information ? x

ID ¹² Type ¹³ Transmission Code ¹⁴

¹⁵

How do I View/Edit DRC and Supplemental Information in Charge Details?

1. Click the Search icon.
2. Type "Charges/Claims" in the Search bar.
3. Click to select "Charges/Claims (My Office)" from the search results.



4. The Charges/Claims screen will open. Click the Charge ID hyperlink in the Charge ID column for the charge you wish to view or edit. Note you will need to filter for the charges that you wish to view.

Charges/Claims (4) Select Action ? x

All Payer Types All Payers All Plans Financial Assignment...

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

Show charges with errors All Service Area Capitated/ Non Capitated Timely Filing Error

All Locations # of client statements since charge crea

Charge Creation From Charge Creation To Claim Line Item ID Payer Claim #

Service ID Charge ID Process ID Batch All Clinicians

Client ID DOS From 01/01/2023 DOS To 04/24/2023 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 \$0.00 Balance Total \$0.00

Charge ID	Plan	Client Name	DOS	Clinician	Procedure Name	Charge	Balance	Unbilled	Paid Amt	Bill Date	Flagged
1111	Medi-Cal/DFC	Anda, Robert C...	04/01/2023 04...	WOLFE, JACOB	Behavioral Se...	\$141.30	\$141.30	\$141.30			
1112	Medi-Cal/DFC	Acosta, Brandon...	04/24/2023 11...	ADMINISTRACION	Acad Review...	\$130.44	\$130.44	\$130.44			
1113	Medi-Cal/DFC	Pharm, Julia T...	04/01/2023 00...	WILLIAMS, BERN...	Phedation S...	\$177.30	\$177.30	\$177.30			
1114	Medi-Cal/DFC	Hendricks, Sara...	04/01/2023 10...	WILLIAMS, BERN...	Phedation S...	\$177.30	\$177.30	\$177.30			

- The Charge Details screen opens. The Delay Reason and Supplemental Information sections are visible. **Edit the data as needed.**
- Once edited, **click the Save button** in the toolbar.

The screenshot shows the 'Charge Details' window with the 'General' tab selected. The 'Status' section has a 'Delay Reason' dropdown menu open, displaying a list of 15 options. A red circle with the number '5' is placed over the dropdown menu. The 'Save' button in the top right toolbar is also visible.

Charge Details

General | Contact | Status History | Action History

General

Charge ID: 2797 Service ID: L2894
 Client: IMPERIAL - India - Behavioral Payer: Medi-Cal DPC Priority: 1

Status

Ready To Bill Flagged Internal Collections: No Delay Reason: [Dropdown Menu]
 Rebill Do Not Bill External Collections:

Revenue Work Queue Management

Charge Status: [Charge Ready] Status Date: 02/04/2023
 Status Comments:

Procedure

DOS: 8302002100000
 Procedure Code: Behavioral Health Counseling and Therapy - 5000-Minutes

Billing Code

Billing Code: Health Services
 Revenue Code: Description
 Date ID: 5000000 - Billing Code Description

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The screenshot shows the 'Charge Details' window with the 'General' tab selected. The 'Ledger Entries' section contains a table with one entry. The 'Supplemental Information' section is highlighted with a red box and a red circle with the number '5'. The 'Save' button in the top right toolbar is also visible.

Charge Details

General | Contact | Status History | Action History

Ledger Entries

Service Id	Charge Id	Date	Activity	Payer	Type	Amount	Check#	Reason Codes/Desc	Remittance Advice Remark Codes/Desc
2797	2797	02/14/2023	Service Co...	Medi...	Charge	(\$191.00)			

Charge Errors

Error Type	Error Description
2797	Claim/Remittance Error - Please check plan/billing codes.
4004	Claim/Remittance Error - Missing Billing Code. Please Check Procedure Rates/Billing Codes

Supplemental Information

ID: [Text Box] Type: [Dropdown Menu] Transmission Code: [Dropdown Menu]

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