Division of Public and Behavioral Health

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1.0 Policy

It is the Policy of the Division of Public and Behavioral Health (DPBH), Substance Abuse, Prevention, and Treatment Agency (SAPTA) that all providers, in accordance with 505 (a) of the Public Health Service Act (42 US code 290aa-4) which directs the Administrator of the Substance Abuse and Mental Health Services Administration (SAMHSA), to collect items including admission and discharge data and to bill SAPTA for services based on facility certifications and SAPTAs rules and regulations.

The billing process includes the following forms, in the following order:

1. **QA Report**
2. **Create Interim Billing Batch File**
3. **Print Bill – to view charges**
4. **Close Charges**
5. **Print Bill – to claim charges**
6. **RFR Final Report**

2.0 Procedure

QA Report

The billing process begins with generating the QA report and ensuring the data looks clean. If changes need to be made (such as on the waterfalls, sliding fee scale, services, etc.) they can be identified by generating this report. Sift through the report and ensure the services and dollar amounts look correct. This report will generate ALL liability for ALL guarantors as a quality assurance measurement.

1. From the Avatar Home Screen, search for the **QA Report /(your facilities name)** form in the **Search Forms** widget.
   a. Double-click the highlighted item in order for the form to display.
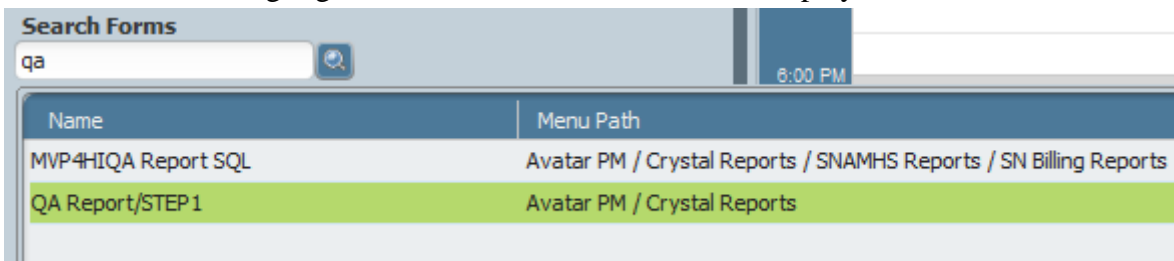
2. The **Enter Report Parameters** screen will appear.
   a. Enter the **Start Date** of the data you'd like to appear.
   b. Enter the **End Date** of the data you'd like to appear.

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3. Click **OK** when complete.

4. The report will display with the following fields:

   - Facility Name
   - Program
   - Patient ID
   - Date of Service
   - Service Code
   - Full Liability
   - Units
   - Payer Name (Guarantor)

5. At the top of the report, the outstanding liability for all guarantors will be listed. This report is used to quality assurance purposes. Therefore, please make sure the services, dates of service and guarantors are correct. If they aren't, changes will need to be made to waterfalls or sliding fee scales.

6. Once changes have been made and the data looks clean, continue on to the next steps to prepare for the RFR.

CREATE INTERIM BILLING BATCH FILE

7. From the Avatar Home Screen, search for the **Create Interim Billing Batch File** form in the **Search Forms** widget.
   b. Double-click the highlighted item in order for the form to display.

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8. In the **Create, View, Or Delete Batch** field, select one of the three options:
    a. **Create** – choose this to create a new batch
    b. **View** – choose this to view a previously created batch
    c. **Delete** – choose this to delete a previously created batch

9. In the **Batch Description** field, name your batch.
    a. Include the Guarantor Name, Date (or time period), and your initials. This will help track previous batches.

10. Enter the **Through Date.**
    a. This is the last date of the billing period that you will be batching claims from (last day of the month)
    b. Use **T** for today if you want to pull all open claims without a strict end date.

11. Choose **Individual Guarantors** in the **Individual Or All Guarantors Or Financial Class** field.
    a. Always choose ALL SAPTA guarantors.

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12. Choose **All Programs** in the **All Or Individual Or Treatment Settings** field, unless there is a specific need by the facility to break out the billing by programs.

    a. **All Programs** – choose this

13. In the **Create Batch Criteria** field, do not check any of the choices. LEAVE THEM ALL UN-CHECKED.

14. In the **Include Zero Balanced Services** field**,** click **NO.**

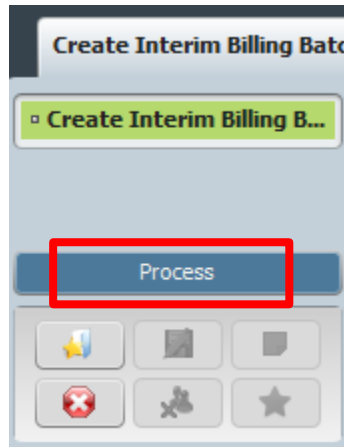15. The **Quick Billing Batch Number** is not a field the SAPTA facilities will be using.

16. Click **Process** on the left hand side.

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17. Once the batch has processed, it will generate a report of all pending charges for that specific guarantor for the specific timeframe requested. Report will reflect the following data:
    a. **Batch #** - located in the header of the report. This number will be very important to complete the rest of the billing processes.
    b. **Name of Batch** – located in the header of the report.
    c. **Batch Created For** – this is the **through date** for the batched file
    d. **Guarantor** – based on the guarantor selection in step 6.
    e. **EP #** - episode number for the service
    f. **Program** – level of service
    g. **Client** – client ID and name will display
    h. **First Service Date** – date of service for the charge specified
    i. **# of Days** – number of days that service was billed for

```
PAGE : 1                         Quest Counseling and Consulting Inc               RUN DATE : 09/22/15
                                    3500 Lakeside Court, Suite 101
                                      Reno  , NV 89509-4843
                                    INTERIM GUARANTOR BILLING FILE
                                          BATCH # : 27
                                Test Medicaid FFS Batch-AUGUST 2015-SR
                                    BATCH CREATED FOR : 08/30/2015

GUARANTOR      EP #  PROGRAM               CLIENT              FIRST SERV DT    # OF DAYS
==========================================================================================

39 - Nevada M  1    1 - Level 1 - Outpatient S   41 - SMITH,JOHNNIE      07/10/2015        1
39 - Nevada M  2    1 - Level 1 - Outpatient S   42 - BLOW,JOSEPH        08/06/2015        1 D
39 - Nevada M  2    1 - Level 1 - Outpatient S   44 - WILSON,OWEN        08/06/2015        1
```
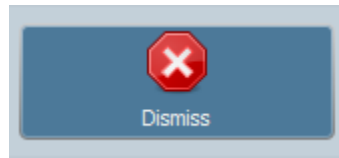
18. Print or save as needed.
    a. **File** – save document
    b. **Print** – print document

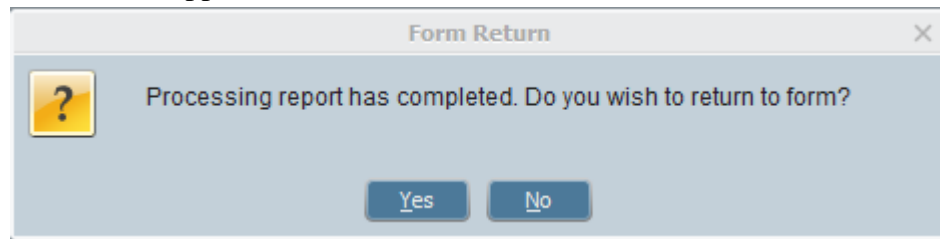19. When complete, click **Dismiss** at the bottom right hand corner of the screen.

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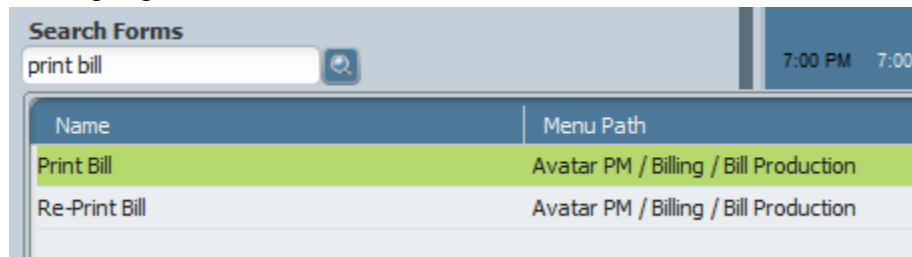| Control #	Rev.	Type	Title	Effective Date	Page
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20. The **Form Return** box will appear. Click **NO.**
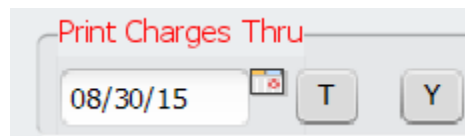
PRINT BILL

21. From the Avatar Home Screen, search for the **Print Bill** form in the **Search Forms** widget.
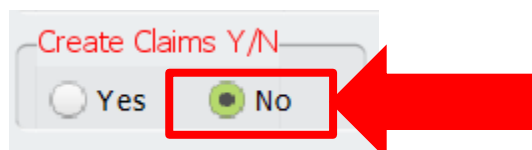   a.   Double-click the highlighted form.

22. The **Print Charges Thru** date must match the date selected on the **Create Interim Billing Batch File** in step 5 above.

23. In the **Create Claims Y/N** field, choose **NO.**
    a.   Claiming the charges will be done in a further step. First, the charges must be viewed. It's crucial that you choose **NO** here.

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24. In the **Print On What Form** field, always choose **Self-Pay** when processing the SAPTA RFRs.
    a. Doing this process for all other guarantors requires a different selection. See the **"Batch, Print, Close, Claim Billing Process"** policy and procedure for further instructions.

Print On What Form

Self Pay ▼

25. In the **Print For Interim Batch** field, choose **YES.**
    a. This will open up the field **Interim Batch Number.**

Print For Interim Batch

● Yes   ○ No

26. In the **Interim Batch Number** field, choose the interim batch that was created in the previous steps.
    a. Double-check the batch number, batch name, date/timeframe, and initials to ensure you are selecting the correct batch. If the wrong batch is selected, it will cause problems.

Batch Description

September 2015 RFR SRobbins

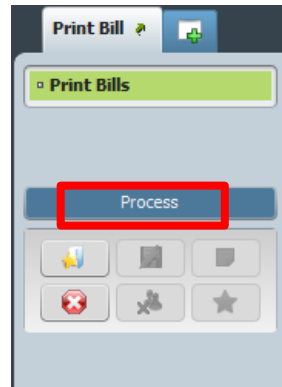27. The various programs do not need to be checked in the **Program(s)** field.

Program(s)

☐ Level 1 - Outpatient Services
☐ Level 2.1 Intensive Outpatient
☐ Residential

28. Click **Process** on the left hand side.

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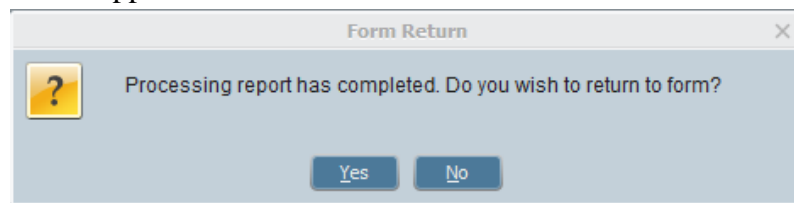**Division of Public and Behavioral Health**

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29. The screen will populate with the HCFA 1500 forms for the various claims. Notice the page counts at the bottom. These can be printed onto HCFA 1500 forms from the **Print** button.
    a. At this time, SAPTA is not requiring HCFA 1500 to be submitted. Therefore, there is no need to print these out.

30. Click **Dismiss** when complete.
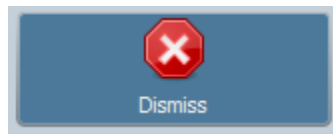
31. The **Form Return** box will appear. Click **NO.**

CLOSE CHARGES

32. Closing charges prepares the services to be claimed.

33. From the Avatar Home Screen, search for the **Close Charges** form in the **Search Forms** widget.
    a. Double-click the highlighted form to open.

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34. In order to close charges, click **Close Charges** in the **Liability Update Or Close Charges** field.

35. Enter the same **Thru Date** that has been entered in the following steps above:
    a. Steps **6** and **17.**

36. Always choose **Interim Batch Cycle** from the **Individual, All, Or Interim Batch Cycle** field.
    a. This will open up the **Interim Batch Number** field.

37. Choose the **Interim Batch Number** from the dropdown menu.
    a. Ensure this is the correct batch that you've been working with on previous steps. Double-check the batch #, batch name, date/time period, and initials.

38. The **Quick Billing Batch Number** is not a field the SAPTA facilities will be using.

39. Click **Submit** on the left hand side of the form to complete the **Close Charges** form.

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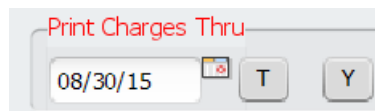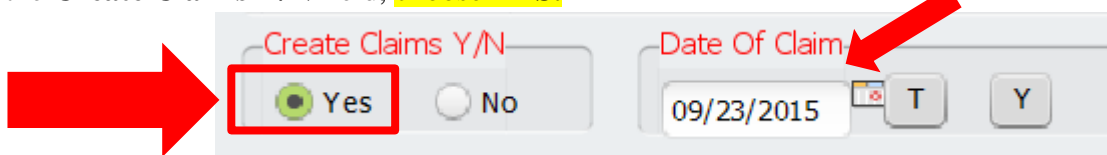| Control #	Rev.	Type	Title	Effective Date	Page
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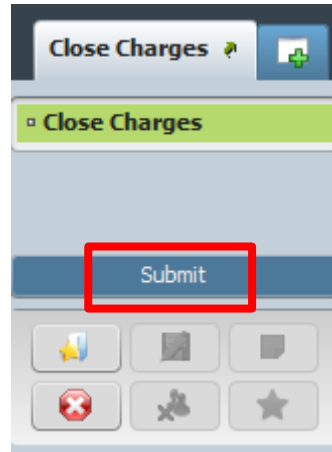
Print Bill

40. After charges have been closed, they are ready to be claimed. This step takes place in the **Print Bill** form.

41. From the Avatar Home Screen, search for **Print Bill** in the **Search Forms** widget.
    a. Double-click the highlighted selection to open the form.
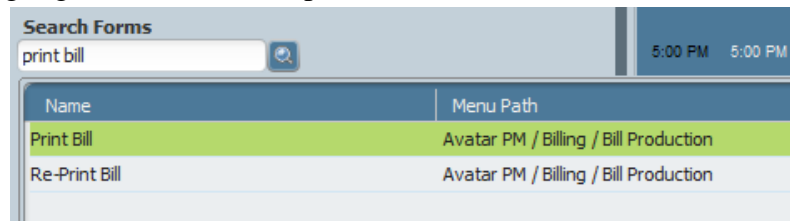
42. The **Print Charges Thru** date must match the date selected on the **Create Interim Billing Batch File** in step 5 above.

43. In the **Create Claims Y/N** field, choose **YES.**

44. The **Date of Claim** date will be the last date of the month of which you are processing.

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45. In the **Print On What Form** field, always choose **Self Pay** when processing the SAPTA RFRs.

46. In the **Print For Interim Batch** field, choose **YES.**
    b.   This will open up the field **Interim Batch Number.**

47. In the **Interim Batch Number** field, choose the interim batch that was created in the previous steps.
    b.   Double-check the batch number, batch name, date/timeframe, and initials to ensure you are selecting the correct batch. If the wrong batch is selected, it will cause problems.

48. The various programs do not need to be checked in the **Program(s)** field.

49. Click **Process** on the left hand side.

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50. The screen will populate with the HCFA 1500 forms for the various claims. Notice the page counts at the bottom.
    a. At this time, SAPTA is not requiring HCFA 1500 forms to be submitted for payment. Therefore, you can dismiss the screen.

RFR FINAL REPORT/

51. The last step to generate the SAPTA RFR back-up documentation is using the **RFR Final** report that is loaded into Avatar.

52. From the HOME screen, search for **RFR Final** in the **Search Forms** field.
    a. Double-click the report form.
    b. Each facility will have their own, named correctly.
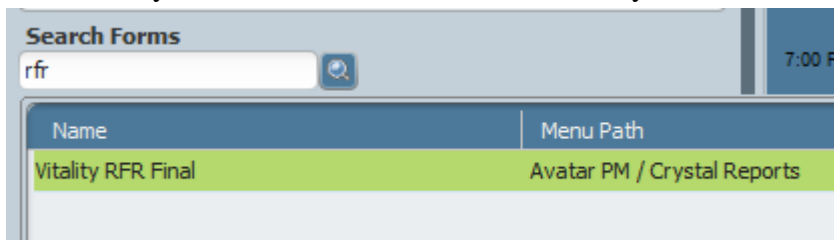
53. A report parameters box will appear.

54. Enter the following data:

    - **Enter Start Date:** this date will ALWAYS be the date your facility went live on Avatar. If you are unsure, use the first date of the year you went live (ex: 01-01-2015).
    - **Enter End Date:** this date will be the last day of the month for the specific SAPTA RFR.
    - **Enter Batch Number:** this number MUST have the batch number that was assigned to the batch in the previous steps. If the batch number is not the same, the wrong data will be compiled for the RFR.
    - **Enter Claim Date:** this date MUST match the claim date that was used in Step 43, which must also be the last day of the month for the specific RFR period.

NOTE: It's crucial that the above data is entered correctly in order to produce a clean RFR. Please double-check before you click "OK".

55. The report will generate with SAPTA specific data for the timeframe chosen. It will list out the dollar amounts for each SAPTA guarantor. This is your SAPTA RFR data report that will be used as back-up documentation to submit with your RFR cover sheet.

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56. Save the report using the upper left hand corner.
    a. There is an option to **Export** the report to an excel spreadsheet. SAPTA will request the excel spreadsheet to be submitted with the RFR cover sheet.
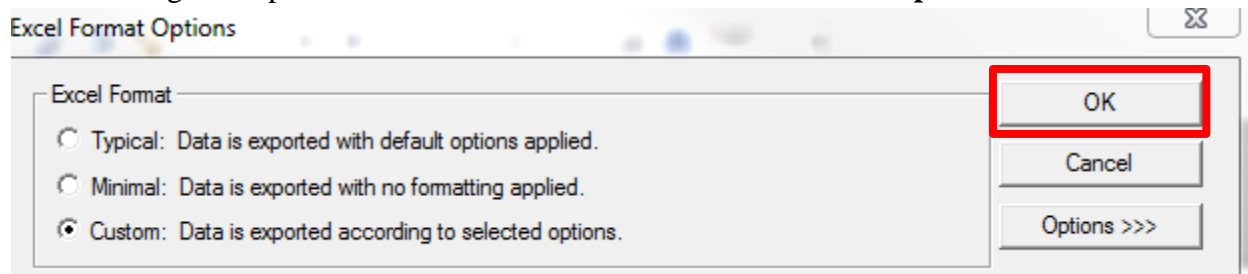
57. Click **Export** in the top left hand corner.
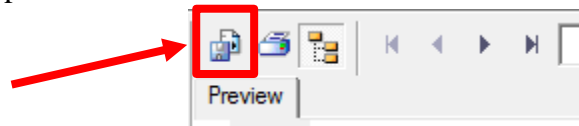
58. In the **Format** dropdown, choose **Microsoft Excel 97-2000 – Data only (XLS).** Click **OK.**
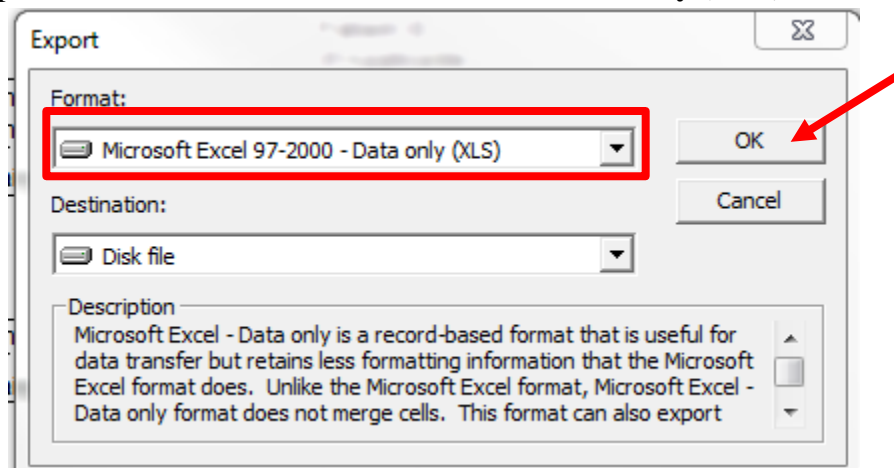
59. Do not change the options on the next screen labeled **Excel Format Options.** Click **OK.**

60. The **Select Export File** box will appear. Save the document in your folders.

61. This excel **RFR Final** report can then be saved with other documentation on the SFTP site issued by SAPTA.

62. Once payments are received from SAPTA, see the **Posting Payments Policy and Procedure** for instructions on entering the payments into Avatar.