

Billing Team Cheat Sheet v1.2

Account Type				
Name	Id	Description	Key Characteristics	Examples
Hourly Services	1	Used for any type of individualized service where an employee is working with one client at a time in any capacity. Funding source pays based on service provided (hourly, daily, milestone, etc.).	<ul style="list-style-type: none"> - <i>Not</i> site-based - Employee works with 1 client at a time 	<ul style="list-style-type: none"> - Behavior Consultation - Respite/Relief Care (Hourly or Daily) - Skills Training - Vocational Services where one employee works with one client at a time and is <i>not</i> at a site.
Residential Program	2	Client lives at a residential program and employees clock in and out at that program. Funding source pays based on client attendance.	<ul style="list-style-type: none"> - Site based - Employees punch at the program, can work with 1+ clients at a time - Client attendance is generated 	<ul style="list-style-type: none"> - 24 Hour Residential Programs - Service Codes would include: Residential, Rent
Day Program	3	Client attends a facility of some sort and employees clock in and out at that facility. Funding source pays based on client attendance.	<ul style="list-style-type: none"> - Site-based - Employees punch at the program, can work with 1+ clients at a time - Client attendance is generated 	<ul style="list-style-type: none"> - Activity centers - Job sites - Rehab centers, etc.
Group Service	4	Client receives service in any location and is not tied directly to a site. Employees can work with one or more clients at a time in any capacity. Funding source pays based on service provided (hourly, daily, monthly, milestone, etc.)	<ul style="list-style-type: none"> - <i>Not</i> site-based - Employee works with 1+ clients at a time 	<ul style="list-style-type: none"> - Oregon Supported Living - Oregon Day Services - Group Therapy
Parenting Program	13	Client lives at a foster home/professional parent home and employees clock in and out at that home. Funding source pays based on client attendance.	<ul style="list-style-type: none"> - Site based - Employees punch at the program, can work with 1+ clients at a time - Client attendance is generated 	<ul style="list-style-type: none"> - Professional Parent Homes/tracking
Transportation	14	Client lives at a residential program/professional parent home and receives funding for	<ul style="list-style-type: none"> - Site-based - Attendance based 	<ul style="list-style-type: none"> - MTP

		transportation. Funding sources pays based on client attendance and transportation provided.		
Client Transportation	15	Client receives transportation services and the mileage is billable to the client's funding source.	- Not Site-based - Employee works 1:1 with client.	- Transporting to the community for hourly services.

Billing Unit		
Note: Billing Units are <i>not</i> tied to how an employee punches. Billing units can be provided in a variety of account types. Just because a billing unit is hourly, does not mean that it has to be tied to an Hourly Services Account. Similarly, just because a billing unit is Daily, does not mean that it has to be tied to a Day Program Account.		
Name	Id	Description
Hourly	2	Paid per hour worked. Is not tied to how the employee punches. Can be billed per hour, or can be rolled up into a daily, weekly, or monthly unit (see below).
Daily	3	Paid per day of service provided, regardless of the number of hours worked. Can be billed per day, or rolled up into a weekly or monthly unit (see below).
Monthly		Paid per month of service provided, regardless of the number of hours worked.
Miles	7	Paid per mile. <i>Note:</i> An hourly account type can have a billing unit of miles. Can be billed per mile, or can be rolled up into a daily, weekly, or monthly unit (see below).

Billing Rounding Increment		
Note: Billing Rounding is available for service codes with hourly units. There are four type of rounding and four increments to select from.		
Name	Id	Description
None	0	Do not round - every minute is billed
15	25	Round to the 15 minute mark (quarter hour)
30	50	Round to the 30 minute mark (half hour)
60	100	Round to the hour mark (hour)

Billing Rounding Type		
Note: Billing Rounding is available for service codes with hourly units. There are four type of rounding and four increments to select from.		
Name	Id	Description
Round	1	Round up or down to the nearest increment
Truncate	2	Always round down
Increment	3	Always round up

Billing Rollup Type			
Name	Id	Description	Examples

None	1	Every billable punch entry is itemized on the billing file.	For example, two employees each work a 2 hour respite shift for Johnny on the same day. Respite has a billing unit type of hourly. The billing file will show two billing entries for 2 units each.
Daily	2	The billing files shows one line per day per Service Code, with each line representing the number of billable units used that day under that Service Code.	For example, two employees each work a 2 hour respite shift for Johnny on the same day. Respite has a billing unit type of hourly. The billing file will show one line item for a total of 4 units consumed that day.
Weekly	3	The billing file shows one line per week per Service Code, with each line representing the number of billable units used that week under that Service Code.	For example, one employee works a 2 hour respite shift for Johnny on Monday, Wednesday, and Friday. Respite has a billing unit of hourly. The billing file will show one line item for a total of 6 units consumed that week.
Monthly	4	The billing file shows one line per month per Service Code, with each line representing the number of billable units used that month under that Service Code.	For example, Johnny receives services in a residential 24-hour program. Residential services has a billing unit of daily. If Johnny was present at the program for 28 out of 31 days in the month, the billing file will show one line item for a total of 28 units consumed that month.

Service Code Set Up

1. Account Type **(required)**: The type of program or service correlated with this Service Code.
 - a. If Hourly or Client Transportation:
 - i. EVV Required: Select “Yes” if EVV is required for this service.
 - ii. In Home Only: Select “Yes” if this service can only be provided in the client’s home. (Not available for Client Transportation)
 - iii. Payable: If “No,” the employee will not be paid for time clocked against this service.
 - iv. Overtime Exempt: If “Yes” is selected, hours punched against this Service Code will not count towards the employee’s weekly hours accumulation towards overtime.
2. Service Code **(required)**: Service Code Name. Employees will need to be able to select this service code when adding a punch, so be sure the name is user friendly.
3. Description **(optional)**
4. EVV Required: If “Yes” is selected, Fob and Phone are enabled as options for time entry. For hourly services, client sign-off via web portal, signature, pin or password becomes required for all time entries.
5. NonBillable: Defaults to “No.” Select yes if this is a billable service.
6. Bill Code **(required)**: Unique identifier provided by the funding source.

7. Billing Unit **(required)**: The increment in which the funding source requires for the service to be billed. Defaults to Miles for Client Transportation.
 - a. If Hourly:
 - i. Default Pay Rate **(optional)**: Entering a pay rate here will autofill the pay rate in all service accounts created with this service code.
 - ii. Default Billing Modifier **(optional)**: Optional modifier
 - iii. Billing Multiplier **(optional)**: User if the funding source bills in less than hourly units. For example, if the funding source bills in 15 minute units, select hourly Billing Unit and quarter hourly for the Billing Multiplier.
8. Enable Geofencing: If "Yes" is selected, this service can only be provided within an established radius from approved locations. Only available when "EVV Required" is "Yes" and the Account Type is Hourly, Group Service, or Parenting Program.
9. Payable: If "Yes," all employee time entries associated with this service code will appear on the payroll file.
10. Overtime Exempt: If "Yes," employee time entries associated with this service code will not count towards the accumulation of 40 hours to calculate overtime.
11. Pay Rate Max Limit: Defaults to "No." If marked "Yes," this service code will have a max pay rate for any employee providing the service.
12. Rounding Increment: Select "None" for no rounding, "15" to round by 15 minutes, etc. (Not available for Client Transportation)
13. Rounding Type: Select "Round" to round to the nearest rounding increment. Select "Truncate" to always round down, and "Increment" to always round up. (Not available for Client Transportation)
14. Has Daily Rate: Defaults to "Yes," which means the funding source will switch to a daily rate for this service after a specified number of hours reached in a day. When "Yes" is checked, the following fields are visible and required:
 - a. Daily Max **(required)**: The maximum number of hours this service can be provided in a day before switching to the daily rate.
 - b. Daily Bill Code **(required)**: Unique identifier provided by the funding source.
15. Billing Rollup Type **(required)**: Designates how service entries will be summarized for the funding source. If "None" is selected, each individual entry will be visible on the billing report sent to the funding source.
16. Has Published Spec: Defaults to "No." If this Service Code has a standard Billing Rate, Daily Max, Weekly Max, and/or Monthly Max, mark "Yes" and complete the fields that are made visible. These fields are not required. All new authorizations under this service code will auto-fill these figures.
17. Allow Diagnosis Code: Defaults to "Yes." If "No" is selected, this field will not appear when an employee adds an entry for this Service Code.
18. Default CPT Code and Default HCPCS Code **(optional)**: The default code for this service. Only one or the other can be entered. For example, if a Default CPT Code is entered, the Default HCPCS Code field will be uneditable.
19. **Service Code Reference 1, 2, and 3 **(optional)**
20. Max Pay Rate **(optional)**: Required if Pay Rate Max limit is yes
21. *Default Provider Service Location **(optional)**: Provider ID as recognized by the funding source.

22. GL Code **(required)**: Code that will link all associated time entries to the appropriate GL account for the customer.
23. Certification Template **(optional)**: Select if there are a set of certification requirements specific to this Service Code.
24. Hide Remaining Balance: If “Yes,” employees will not be able to see the authorization remaining balance when adding a time entry.
25. Status: Defaults to “Active.” Select “Inactive” when this is no longer a valid Service Code.