

Medi-Cal as Secondary Payor

V.3

Contents

Agency Setup	2
Client Setup.....	5
Billing the Primary Payor.....	6
Recording the Denial.....	11
Creating the New Claim Item.....	14



Please note that two additional steps have been incorporated to this version of the instructions. They are marked by an **orange** star, on pages 2 and 5.

Medi-Cal as Secondary Payor

V.3

Agency Setup

The first step is to make sure that you have the other payor set up. You can choose an Invoice or a CMS-1500 as the Billing Form. For the purposes of this outline, we will be working with Kaiser as the non-Medi-Cal payor plan.

SWITS Training		User: Moore, Sarah Loc: Drug Abuse Alternatives Center, Outpatient Drug Free Client:	Print View	June 2010, Rev 1 Logout			
Home Page Agency ▾ Agency List ▶ Facility List ▶ Staff List ▶ Tx Team Groups ▶ Non-Staff Physicians ▶ System Usage Drug Screening ▶ Billing ▾ Claim Item List Claim Batch List Encounter List EOB Transaction List Payment List ▶ Billing Transaction List Client Balance Clearing House Item Clearing House Batch Cost Center Payor Plan List ▾ Payor Plan Profile Group List Agency Plan Profile	Payor Plan List				Add New Payor Plan		
	Company	Plan Name	CH Agency	Plan Type	HIPAA Payor ID	Billing Form	Actions
	Medi-Cal	Medi-Cal - ADP Non-Perinatal	Sonoma County AODS	Medicaid	20	837P	Profile
	Self-pay	Self-pay		Self-pay		Invoice	Profile
	CMSP	CMSP		Other		Invoice	Profile
	Federal Probation	Federal Probation		Other		Invoice	Profile
	Lake County AODS	Lake County AODS		Other		Invoice	Profile
	Napa County Probation	Napa County Probation		Other		Invoice	Profile
	Catholic Charities	Catholic Charities		Other		Invoice	Profile
	None - Do not use	None - Do not use		Other		Invoice	Profile
	Kaiser	Kaiser		Other		Invoice	Profile
	CPS	CPS		Other		Invoice	Profile
	No Payor	No Payor		Other		Invoice	Profile
	SASCA	SASCA		Other		Invoice	Profile
	Medi-Cal	Medi-Cal ADP - Perinatal	Sonoma County AODS	Medicaid	25	837P	Profile
	Teamsters Assistance Program	TAP		Other		Invoice	Profile
	Assistance & Recovery Program Inc	ARP		Other		Invoice	Profile
AODS	Self-Pay rate1		Self-pay		Invoice	Profile	
Sonoma County AOD	Drug Court Services		Other		Invoice	Profile	
AODS	Drug Free Babies		Other		Invoice	Profile	
AODS	Peri community residential		Other		Invoice	Profile	
AODS	TASC		Other		Invoice	Profile	
AODS	BASN		Other		Invoice	Profile	

Don't forget to complete the Agency and Facility Profile for this payor plan, in particular the Payor Name, the Payor ID#, the Agency Primary Provider #, and the Primary Provider # Type.

SWITS QA		User: Moore, Sarah Loc: Drug Abuse Alternatives Center, Outpatient Drug Free Client:	Diagnostics	Print View	June 2010, Rev 1 Logout
Home Page Agency ▾ Agency List ▶ Facility List ▶ Staff List ▶ Tx Team Groups ▶ Non-Staff Physicians ▶ System Usage Drug Screening ▶ Billing ▾ Claim Item List Claim Batch List Encounter List EOB Transaction List Payment List ▶ Billing Transaction List Client Balance Clearing House Item Clearing House Batch Cost Center Payor Plan List ▾ Payor Plan Profile Group List	Payor Plan Profile				
	Plan Type	Other			
	Plan Name	Kaiser			
	Billing Form	Invoice			
	Company Name	Kaiser			
	Agency	Drug Abuse Alternatives Center			
	Clearing House Agency				
	Claim Filing Type	Preferred Provider Organization (F)			
	Client Confidential	No			
	HIPAA EDI Information				
	Payor Name		Payor ID#		
	Receiver Name		Receiver ETIN		
	Application Receiver #		Interchange Receiver #		
	HIPAA Processing Set				
	Segment Delimiter		Element Delimiter		Composite Delimiter
	<input type="button" value="Cancel"/> <input type="button" value="Save"/> <input type="button" value="Finish"/> <input type="button" value="Next"/>				



Medi-Cal as Secondary Payor

V.3

SWITS QA User: Moore, Sarah Loc: Drug Abuse Alternatives Center, Outpatient Drug Free Client: Diagnostics June 2010, Rev 1

Agency Profile for Kaiser

Billing Form: Invoice EDI Mode: Test

Agency Primary Provider #: 941694676 Primary Provider # Type: Employer's Identification Number

Agency Secondary Provider #: 941694676 Secondary Provider # Type: Employer's Identification Number

HIPAA EDI Information

Submitter ETIN: Application Sender #: Interchange Sender #:

Buttons: Previous, Cancel, Save, Finish, Next

Navigation Menu: Home Page, Agency, Agency List, Facility List, Staff List, Tx Team Groups, Non-Staff Physicians, System Usage, Drug Screening, Billing, Claim Item List, Claim Batch List, Encounter List, EOB Transaction List, Payment List, Billing Transaction List, Client Balance, Clearing House Item, Clearing House Batch, Cost Center, Payor Plan List, Payor Plan Profile, **Agency Plan Profile**, Facility Plan Profile, Court

You will then need to make sure that you have rates set up for this non-Medi-Cal payor plan. In this case, rates that are Plan-Specific or Agency Plan-Specific, where the plan is not Kaiser, would not work for releasing an encounter to Kaiser. You should either have Agency-Standard rates, or Plan-Specific rates for Kaiser set up.

SWITS Training User: Moore, Sarah Loc: Drug Abuse Alternatives Center, Outpatient Drug Free Client: June 2010, Rev 1

Agency Rate Search

Agency: Service: Plan: Rate Per Unit: Duration Type: Duration: Effective Date: Expiration Date: Clear Go

Agency Rate List (Export) Add Rate

Svc #	Rate #	Service Desc	Procedure	Agency Name	Plan	Rate/Unit	Effective	Expiration	Unit Desc	Active	Actions
227	141	H0003 - Drug Screening	H0003	Drug Abuse Alternatives Center		\$35.00	1/1/2006		1 Unit = 1 Drug Screening	Yes	Profile Clone
131	126	H0003 - Drug Screening Ct order	H0003/H9		Medi-Cal - ADP Non-Perinatal	\$13.00	1/1/2007	6/30/2007	1 Unit = 1 Drug Screening	No	Profile Clone
247	190	H0004 - ODF - Individual Counseling	H0004		Medi-Cal - ADP Non-Perinatal	\$66.53	10/1/2009		1 Unit = 1 Face-to-Face Visit Per Person	Yes	Profile Clone
247	230	H0004 - ODF - Individual Counseling	H0004	Drug Abuse Alternatives Center		\$66.53	8/1/2009		1 Unit = 1 Face-to-Face Visit Per Person	Yes	Profile Clone
248	231	H0004 - ODF - Individual Counseling	H0004/H9	Drug Abuse Alternatives Center		\$66.00	1/1/2007		1 unit =	Yes	Profile Clone
69	116	H0004 - ODF - Individual Counseling	H0004/HD/HF		Medi-Cal ADP - Perinatal	\$106.08	1/1/2006		1 Unit = 1 Face-to-Face Visit Per Person	Yes	Profile Clone
101	119	H0004 - ODF - Individual Counseling	H0004/HD/HF/H9		Medi-Cal ADP - Perinatal	\$106.08	1/1/2006		1 Unit = 1 Face-to-Face Visit Per Person	Yes	Profile Clone

Medi-Cal as Secondary Payor

V.3

SWITS Training User: Moore, Sarah Loc: Drug Abuse Alternatives Center, Outpatient Drug Free Client: June 2010, Rev 1

Service
 Service #: 227
 Cpt Code: H0003 Description: H0003 - Drug Screening
 Rendering Provider: No Measure Type: Unit
 Date Span: No Modifier 1:
 Effective Date: 1/1/2006 Modifier 2:
 Expiration Date: Modifier 3:
 Created Date: 5/25/2007 Modifier 4:

Agency Rate Profile
 Rate # 141 Rate Per Unit \$35.00
 Service H0003/H0003 - Drug Screening
 Description 1 Unit = 1 Drug Screening
 Duration Type
 Effective Date 1/1/2006 Expiration Date
 Rate Type Agency - Standard
 Facility Agency - Plan-Specific
 Plan Agency - Standard
 Is Authorization Required No
 Updated Date 5/25/2007 1:07 PM Updated By Norton, Lisa
 Created Date 5/25/2007 1:02 PM Created By Norton, Lisa

Buttons: Cancel Save Finish

You will then need to set up the Plan Payment for the Primary Payor(s).

SWITS Training User: Moore, Sarah Loc: Drug Abuse Alternatives Center, Outpatient Drug Free Client: June 2010, Rev 1

Payment Search
 Payor Plan Client Pmt #
 Posted Date Reference
 Payment Amount Unapplied Amount
 Buttons: Clear Go

Payment List (Export) Add Client Payment Add Plan Payment

Pmt #	Payor Name	Posted	Payment Amount	Unapplied Amount	Intended For	Created By	Actions

This payment record should have a \$0 balance, because the assumption is that the Primary Payor denied the claim in full. You will use this same payment record to process all Primary Payor denials for this Payor.

Medi-Cal as Secondary Payor

V.3

SWITS Training User: Moore, Sarah Loc: Drug Abuse Alternatives Center, Outpatient Drug Free Client: June 2010, Re Logout

Home Page Agency Agency List Facility List Staff List Tx Team Groups Non-Staff Physicians System Usage Drug Screening Billing Claim Item List Claim Batch List Encounter List EOB Transaction List Payment List **Payment Profile** Billing Transaction List Client Balance Clearing House Item Clearing House Batch Cost Center

Payment Profile

Payment # 6174 Posted Date 7/14/2010
Plan Name Kaiser Receipt Date 7/14/2010
Client Name Created Date 7/14/2010 12:35 PM
Transaction Type Payment Created By Moore, Sarah
Reference Payment Amount \$0.00
Comment Unapplied Amount \$0.00
Intended For Check/EFT Date

Administrative Actions
[Show Payment Application](#) [Apply Payment](#)

Cancel Save Finish

Client Setup

Enroll the client in the primary payor group. Be sure to fill out the Subscriber # field, even though it is not dark yellow.

Home Page Agency Court Group List Custody Program Client List Client Profile Alternate Names Additional Information Contact Info Collateral Contacts Other Numbers Confidential History **Payor Group Enrollment** Authorization Non-Episode Contact Custody Program Activity List Episode List System Administration My Settings

Payor List Add Benefit Plan Enrollment

Group	Subscriber/ Acct#	Subscriber/ Resp Party	Start Date	End Date	Actions
Medi-Cal Non-Perinatal	123456789	Flintstone, Pebbles	7/1/2007		Edit Remove

Benefit Plan/Private Pay Billing Information

Group Kaiser Payor Type Other
Plan Details Policy #
Coverage Start End Payment Scale
Aid Code Relationship to Subscriber/ Responsible Party
Subscriber/ Responsible Party:
First Name Middle Last Name
Birthdate Gender **Subscriber #**
Address 1
Address 2
City State Zip

Cancel Save



Medi-Cal as Secondary Payor

V.3

Billing the Primary Payor

Create an encounter the way you would in your typical process.

SWITS Training User: Moore, Sarah
Loc: Drug Abuse Alternatives Center, Outpatient Drug Free
Client: Flintstone, Pebbles | FP02010160 | Case #: 1

Encounter for Flintstone, Pebbles

Note Type: **Progress Notes**
ENC ID: 29647 Created Date: 7/14/2010 12:27 PM

Service: **H0003 - Drug Screening**
Program Name: **1-Outpatient Drug Free/Outpatient Drug Free : 7/24/2007 -**

Service Location: **Non-residential Substance Abuse TX Facilit**
Start Date: 7/14/2010 End Date:
Start Time: 10:00 AM End Time: 11:00 AM
Duration: 60 Min

Prop 36/SACPA: **No** Emergency:
of Service Units/Sessions: **1**

Perinatal Service: **No** Visit Type: **DC-Day Care Habilitative** Medi-Cal Billable: **Yes**
Pregnant/Postpartum: **No**

Diagnoses for this Service

Primary: **303.90-Alcohol Dependence(DSM)**
Secondary:
Tertiary:

Rendering Staff: **Access, DAAClinician**
Supervising Staff:
Referring Phys:

Administrative Actions
[Release to Billing](#) [Delete](#)

Buttons: Cancel Save Finish Next

Release to the Primary Payor.

Document1 - Microsoft Word

SWITS Training - Windows Internet Explorer
http://sonoma-training.witsweb.org/System.aspx

SWITS Training User: Moore, Sarah
Loc: Drug Abuse Alternatives Center, Outpatient Drug Free
Client: Flintstone, Pebbles | FP02010160 | Case #: 1

June 2010, Rev 1
Print View Logout

Release To Billing

Group Enrollment: **Medi-Cal Non-Perinatal**
Plan: **Kaiser**
Delay Reason: **Medi-Cal Non-Perinatal**

Report Transmission Type:
Attachment Control Number:

The Group Enrollment dropdown reflects Client Profile>Payor Group Enrollments effective on the encounter date of service. If the Medi-Cal billable indicator on the encounter is 'no', Medi-Cal enrollment will not be included in the dropdown.

Buttons: Cancel Finish

Medi-Cal as Secondary Payor

V.3

Note the error message about the rate for the selected service. This is what happens when there is no rate established for the date/payor/service, as described in the Agency Setup section.

SWITS Training User: Moore, Sarah
 Loc: Drug Abuse Alternatives Center, Outpatient Drug Free
 Client: Flintstone, Pebbles | FP02010160 | Case #: 1

June 2010, Rev 1

Print View Logout

Home Page
 Agency ▶
 Court ▶
 Group List ▶
 Custody Program
 Client List ▼
 Client Profile ▶
 Non-Episode Contact
 Custody Program ▶
 Activity List ▼

No Rate could be found for service H0004 - ODF - Individual Counseling, CPT H0004.
 The Group Enrollment dropdown reflects Client Profile>Payor Group Enrollments effective on the encounter date of service. If the Medi-Cal billable indicator on the encounter is 'no', Medi-Cal enrollment will not be included in the dropdown.

Release To Billing

Group Enrollment **Kaiser**
 Plan **Kaiser**

Cancel Finish

On the claim item list, you will see the claim item you just created.

SWITS Training User: Moore, Sarah
 Loc: Drug Abuse Alternatives Center, Outpatient Drug Free
 Client:

June 2010, Rev 1

Print View Logout

Home Page
 Agency ▼
 Agency List ▶
 Facility List ▶
 Staff List ▶
 Tx Team Groups ▶
 Non-Staff Physicians ▶
 System Usage
 Drug Screening ▶
 Billing ▼
 Claim Item List
 Claim Batch List
 Encounter List
 EOB Transaction List
 Payment List ▶
 Billing Transaction List

Claim Item Search

Plan Kaiser Group Enrollment
 Client First Name Client Last Name ENC ID
 Subscriber/Resp Party First Name S/R Party Last Name Charge
 Subscriber/Resp Party Account # Rendering Staff Service Date
 Authorization # Service Date
 Item Status All Awaiting Review Facility

Create Batches Clear Go

Claim Item List (Export)

Item #	Client Name	Service Date	Service	Duration	Status	Release Date	Charge	Actions
30547	Flintstone, Pebbles	8/14/2009	H0003	60 Min	Awaiting Review	7/14/2010	\$35.00	Profile
30548	Flintstone, Pebbles	7/14/2010	H0003	60 Min	Awaiting Review	7/14/2010	\$35.00	Profile

Create the Batch for the Primary Payor.

SWITS Training User: Moore, Sarah
 Loc: Drug Abuse Alternatives Center, Outpatient Drug Free
 Client:

Print View

Home Page
 Agency ▼
 Agency List ▶
 Facility List ▶
 Staff List ▶
 Tx Team Groups ▶
 Non-Staff Physicians ▶
 System Usage
 Drug Screening ▶
 Billing ▼
 Claim Item List
 Claim Batch List
 Encounter List
 EOB Transaction List
 Payment List ▶
 Billing Transaction List
 Client Balance
 Clearing House Item
 Clearing House Batch

Choose Plan(s) for Batching

Available Plans
 AODS Orenda services

Selected Plans
 Kaiser

Medi-Cal as Secondary Payor

V.3

SWITS Training User: Moore, Sarah Loc: Drug Abuse Alternatives Center, Outpatient Drug Free Client: June 2010, Rev 1

Home Page Agency List Agency List Facility List Staff List Tx Team Groups Non-Staff Physicians System Usage Drug Screening Billing Claim Item List **Claim Batch List** Encounter List EOB Transaction List Payment List Billing Transaction List Client Balance Clearing House Item Clearing House Batch Cost Center Payor Plan List Court Group List Custody Program Client List System Administration My Settings Reports

Provider Claim Batch List

Plan Name: Kaiser Created Date: []
 Billing Form: [] Transmit Date: []
 Batch #: [] Status: []

Clear Go

Claim Batch List (Export)

Batch #	Status	Batch For	Billing Form	Order	Charges	Service Mo/Yr	Created	Transmit	Actions
278	Awaiting Review	Kaiser	Invoice	P	\$35.00	Aug 2009	7/14/2010		Claim Items Profile
279	Awaiting Review	Kaiser	Invoice	P	\$35.00	Jul 2010	7/14/2010		Claim Items Profile

Claim Item List (Export)

Claim #	Item #	Client Name	CPT	Status	Auth #	Cost Center	Charge	Actions

Select "Profile" from the Batch List Actions column to continue processing the batch.

If the batch looks fine, Release it.

SWITS Training User: Moore, Sarah Loc: Drug Abuse Alternatives Center, Outpatient Drug Free Client: June 2010, Rev 1

Home Page Agency List Agency List Facility List Staff List Tx Team Groups Non-Staff Physicians System Usage Drug Screening Billing Claim Item List **Claim Batch List** Encounter List EOB Transaction List Payment List Billing Transaction List Client Balance Clearing House Item Clearing House Batch Cost Center Payor Plan List Court Group List Custody Program Client List System Administration My Settings Reports Support Ticket

Provider Claim Batch Profile

Batch # 279 Charge Amount \$35.00
 Batch For Kaiser Status Awaiting Review
 Created By Moore, Sarah Created Date 7/14/2010 12:30 PM
 Updated By Moore, Sarah Updated Date 7/14/2010 12:30 PM
 Billing Form Invoice Transmit Date []
 Order Primary Ignore Warnings No
 Service Month/Year 7/1/2010

Errors List (Export)

Batch #	Level	Message	Created	Claim #	Item #

Administrative Actions
[Release](#) [Hold](#) [Void](#)

Cancel Save Finish

Medi-Cal as Secondary Payor

V.3

Then Bill it.

The screenshot shows the SWITS Training software interface. The top navigation bar includes the user name 'Moore, Sarah', the location 'Drug Abuse Alternatives Center, Outpatient Drug Free', and the date 'June 2010, Rev 1'. There are icons for 'Print Report' and 'Print Menu', and a 'Logout' link.

The main content area is divided into two sections:

- Provider Claim Batch Profile:** This section displays details for a claim batch. The 'Batch #' is 279, and the 'Batch For' is Kaiser. The 'Charge Amount' is \$35.00, and the 'Status' is Released. The 'Created By' is Moore, Sarah, and the 'Created Date' is 7/14/2010 12:30 PM. The 'Updated By' is Moore, Sarah, and the 'Updated Date' is 7/14/2010 12:32 PM. The 'Billing Form' is set to Invoice, and the 'Order' is Primary. The 'Service Month/Year' is 7/1/2010. The 'Transmit Date' and 'Ignore Warnings' fields are empty.
- Errors List (Export):** This section contains a table with the following columns: Batch #, Level, Message, Created, Claim #, and Item #. The table is currently empty.

At the bottom of the interface, there is an 'Administrative Actions' section with a 'Bill It' button highlighted by a red box. Other buttons include 'Cancel', 'Save', and 'Finish'.

In this case, I have the Kaiser plan set up to create in Invoice. You can save the file, mail it out, or close it and forget about it. WITS will not know the difference. It assumes you have actually billed the Primary

Medi-Cal as Secondary Payor

V.3

Payor at this point.

The screenshot shows a web browser window displaying an invoice. The browser address bar shows the URL: http://sonoma-training.witsweb.org/System.aspx. The page title is "Invoice" and it is Page 1 of 1. The invoice details are as follows:

Drug Abuse Alternatives Center 2380 Professional Drive Santa Rosa, CA 95403		Invoice # 7602 Account # Date 07/14/2010					
Bill To Kaiser	Client Flintstone, Pebbles 233 Granite Way Rockville, MD 21701						
Ref #	Start Date	End Date	Duration	Service	Staff	Charges	Balance
30548	7/14/2010	7/14/2010	60 Min	H0003	Access, DAACClinician	\$35.00	\$35.00
Total Charges:							\$35.00
Total Balance:							\$35.00

Administrative Actions: [Billing Process Complete](#) [Reprint](#)

The "Billed" status is shown on the Claim Batch list.

The screenshot shows the "Provider Claim Batch List" page in the SWITS Training system. The page includes a search form and a table of claim batches.

Search Form:

- Plan Name: Kaiser
- Billing Form: [Dropdown]
- Batch #: [Text Box]
- Created Date: [Text Box]
- Transmit Date: [Text Box]
- Status: [Dropdown]

Buttons: [Clear](#) [Go](#)

Claim Batch List (Export)

Batch #	Status	Batch For	Billing Form	Order	Charges	Service Mo/Yr	Created	Transmit	Actions
278	Released	Kaiser	Invoice	P	\$35.00	Aug 2009	7/14/2010		Claim Items Profile
279	Billed	Kaiser	Invoice	P	\$35.00	Jul 2010	7/14/2010	7/14/2010	Claim Items Profile

Medi-Cal as Secondary Payor

V.3

Recording the Denial

From the Payment List, search for the \$0 payment you set up earlier for the Primary Payor plan.

SWITS Training User: Moore, Sarah Loc: Drug Abuse Alternatives Center, Outpatient Drug Free Client: June 2010, Rev 1

Home Page Agency List Agency List Facility List Staff List Tx Team Groups Non-Staff Physicians System Usage Drug Screening Billing Claim Item List Claim Batch List Encounter List EOB Transaction List **Payment List** Payment Profile Billing Transaction List

Payment Search

Payor Plan: Kaiser Client: Pmt #: Reference: Payment Amount: Unapplied Amount: Clear Go

Payment List (Export)

Pmt #	Payor Name	Posted	Payment Amount	Unapplied Amount	Intended For	Created By	Actions
6174	Kaiser	7/14/2010	\$0.00	\$0.00		Moore, Sarah	Profile

Add Client Payment Add Plan Payment

Select "Apply Payment".

SWITS Training User: Moore, Sarah Loc: Drug Abuse Alternatives Center, Outpatient Drug Free Client: June 2010, Rev 1

Home Page Agency List Agency List Facility List Staff List Tx Team Groups Non-Staff Physicians System Usage Drug Screening Billing Claim Item List Claim Batch List Encounter List EOB Transaction List Payment List **Payment Profile** Billing Transaction List Client Balance Clearing House Item Clearing House Batch Cost Center Payor Plan List

Payment Profile

Payment # 6174 Posted Date 7/14/2010
Plan Name Kaiser Receipt Date 7/14/2010
Client Name Created Date 7/14/2010 12:35 PM
Transaction Type Payment Created By Moore, Sarah
Reference Payment Amount \$0.00
Comment Unapplied Amount \$0.00
Intended For Check/EFT Date

Administrative Actions
[Show Payment Application](#) **Apply Payment**

Cancel Save Finish

Medi-Cal as Secondary Payor

V.3

The next screen is the Payment Application screen. The Plan is automatically selected for you, and claim items eligible to be paid by this plan are listed.

SWITS Training
User: Moore, Sarah
Loc: Drug Abuse Alternatives Center, Outpatient Drug Free
Client:
June 2010, Rev 1
Print View
Logout

Home Page
Agency ▼
Agency List ▶
Facility List ▶
Staff List ▶
Tx Team Groups ▶
Non-Staff Physicians ▶
System Usage
Drug Screening ▶
Billing ▼
Claim Item List
Claim Batch List
Encounter List
EOB Transaction List
Payment List ▼
Payment Profile
Billing Transaction List

Payment Application Claim Search

Payment # 6174 Unapplied Amount \$0.00 Client Name
Claim # Member # Plan Name Kaiser
Claim Balance >0 Claim Charge Order of Benefits
Clear Go Finish

Payment Application Claim List *Paid in Full* *Denied in Full* Denial Reason
Denial Reason

<input type="checkbox"/>	Claim #	Client Name	Member #	Charge	Claim Balance	DOS	Order of Benefits	Actions
<input type="checkbox"/>	7602	Flintstone, Pebbles		\$35.00	\$35.00	2010/07/14-2010/07/14	Primary	Select

Select the claim items that should be denied, select a Denial Reason from the dropdown, and then select “Denied in Full”.

SWITS Training
User: Moore, Sarah
Loc: Drug Abuse Alternatives Center, Outpatient Drug Free
Client:
June 2010, Rev 1
Print View
Logout

Home Page
Agency ▼
Agency List ▶
Facility List ▶
Staff List ▶
Tx Team Groups ▶
Non-Staff Physicians ▶
System Usage
Drug Screening ▶
Billing ▼
Claim Item List
Claim Batch List
Encounter List
EOB Transaction List
Payment List ▼
Payment Profile
Billing Transaction List

Payment Application Claim Search

Payment # 6174 Unapplied Amount \$0.00 Client Name
Claim # Member # Plan Name Kaiser
Claim Balance >0 Claim Charge Order of Benefits
Clear Go Finish

Payment Application Claim List *Paid in Full* *Denied in Full* Denial Reason Claim denied charges.
Denial Reason

<input type="checkbox"/>	Claim #	Client Name	Member #	Charge	Claim Balance	DOS	Order of Benefits	Actions
<input checked="" type="checkbox"/>	7602	Flintstone, Pebbles		\$35.00	\$35.00	2010/07/14-2010/07/14	Primary	Select

Note that if you come back at a later date and try to process a denial for this same claim item, you will receive a message letting you know that this claim has already been processed:

SWITS Training
User: Moore, Sarah
Loc: Drug Abuse Alternatives Center, Outpatient Drug Free
Client:
June 2010, Rev 1
Print View
Logout

Home Page
Agency ▼
Agency List ▶
Facility List ▶
Staff List ▶
Tx Team Groups ▶
Non-Staff Physicians ▶
System Usage
Drug Screening ▶
Billing ▼
Claim Item List
Claim Batch List
Encounter List
EOB Transaction List

Payment Application Claim Search

Payment # 6174 Unapplied Amount \$0.00 Client Name
Claim # Member # Plan Name Kaiser
Claim Balance >0 Claim Charge Order of Benefits
Clear Go Finish

Payment Application Claim List *Paid in Full* *Denied in Full* Denial Reason Coinsurance Amount
Denial Reason

Warning:
The following claims were ignored since EOB already existed: 7602.
You must select at least one claim first.

<input type="checkbox"/>	Claim #	Client Name	Member #	Charge	Claim Balance	DOS	Order of Benefits	Actions
<input type="checkbox"/>	7602	Flintstone, Pebbles		\$35.00	\$35.00	2010/07/14-2010/07/14	Primary	Select

Medi-Cal as Secondary Payor

V.3

Having selected “Denied in Full” on an eligible claim, you will be brought to the Bill Another Payor screen.

The screenshot shows the 'Bill Another Payor' screen in the SWITS Training system. The user is Sarah Moore, located at Drug Abuse Alternatives Center, Outpatient Drug Free. The date is June 2010, Rev 1. The screen has a left-hand navigation menu and a main content area. The main content area is divided into two sections: 'Bill Another Payor' and 'Encounters'.

Bill Another Payor

- Order of Benefits: Secondary
- Group Enrollment: Medi-Cal Non-Perinatal
- Payor Plan: Medi-Cal - ADP Non-Perinatal
- Initial Status: (empty dropdown)

Encounters

Enc #	Units	Charge	Service	Service Date	Encounter Balance	Actions
29647	1.00	\$35.00	H0003 - Drug Screening	7/14/2010	\$35.00	Edit

Buttons: Cancel, Finish

Select the Initial Status that you want the new claim item to be in when you select Finish.

This screenshot is identical to the previous one, but the 'Initial Status' dropdown menu is now populated with the option 'Awaiting Review'.

Bill Another Payor

- Order of Benefits: Secondary
- Group Enrollment: Medi-Cal Non-Perinatal
- Payor Plan: Medi-Cal - ADP Non-Perinatal
- Initial Status: Awaiting Review

Encounters

Enc #	Units	Charge	Service	Service Date	Encounter Balance	Actions
29647	1.00	\$35.00	H0003 - Drug Screening	7/14/2010	\$35.00	Edit

Buttons: Cancel, Finish

Medi-Cal as Secondary Payor

V.3

Selecting “Finish” on the Bill Another Payor screen creates the following EOB transactions:

The screenshot shows the SWITS Training interface. The top navigation bar includes the user name 'Moore, Sarah', location 'Drug Abuse Alternatives Center, Outpatient Drug Free', and a 'Print View' button. The left sidebar contains a menu with 'EOB Transaction List' highlighted. The main content area is titled 'EOB Transaction Search' and contains search criteria: 'EOB Transaction Type' (dropdown), 'Client Name' (text box), 'Payment #' (text box), 'Payor Name' (text box), and 'Enc # 29647' (text box). There are 'Clear' and 'Go' buttons. Below the search area is the 'EOB Transaction List (Export)' table.

Enc #	Client Name	Svc Date	Transaction Type	Adjustment Reason	App Amt	App Date	Pmt #	Payor Name	Actions
29647	Flintstone, Pebbles	7/14/2010	Payment		\$0.00	7/14/2010	6174	Kaiser	
29647	Flintstone, Pebbles	7/14/2010	Other adjustments	Claim denied charges.	\$35.00	7/14/2010	6174	Kaiser	

You will not see this information unless you go to the EOB Transaction list to look it up, but it is there.

Creating the New Claim Item

Selecting “Finish” on the Bill Another Payor screen also creates a new claim item for Medi-Cal, which will be in the status you specified.

At this point, you can edit the claim item if you need to add an override code, etc., by selecting the “Profile” Action link.

The screenshot shows the SWITS Training interface for 'Claim Item Search'. The top navigation bar is the same as the previous screenshot. The left sidebar has 'Claim Item List' highlighted. The main content area is titled 'Claim Item Search' and contains search criteria: 'Plan' (dropdown), 'Group Enrollment' (dropdown), 'ENC ID 29647' (text box), 'Client First Name' (text box), 'Client Last Name' (text box), 'Charge' (text box), 'Subscriber/Resp Party First Name' (text box), 'S/R Party Last Name' (text box), 'Service' (text box), 'Subscriber/Resp Party Account #' (text box), 'Rendering Staff' (text box), 'Service Date' (text box), 'Authorization #' (text box), 'Item Status' (dropdown, set to 'All Awaiting Review'), and 'Facility' (dropdown). There are 'Create Batches', 'Clear', and 'Go' buttons. Below the search area is the 'Claim Item List (Export)' table.

Item #	Client Name	Service Date	Service	Duration	Status	Release Date	Charge	Actions
30549	Flintstone, Pebbles	7/14/2010	H0003	60 Min	Awaiting Review	7/14/2010	\$35.00	Profile

You can proceed to bill Medi-Cal as you normally would at this point. The 837 file will reflect the primary payor denial.