SCENARIO: AN ENTIRE SERVICE AUTHORIZATION IS INCORRECT ON A PERSON'S PCSP AND CLAIMS ARE IN A STATUS OF "PAID" OR "PAID ADJUSTED"

Description: The process to REMOVE a Service Authorization because an **"entire"** Service Authorization is incorrect on the Person's plan and needs to be replaced with a new Service Authorization, but there is **billing** against the incorrect Service Authorization.

Prevention: To AVOID incorrect Service Authorizations, it is important…

➢ to review **EACH** Service Authorization before acknowledging (check, check, and recheck). If not correct, contact the ISC.

➢ before billing on a Service Authorization, check to ensure the service is **"correct."** If not, **do not** bill on the Service Authorization.

Disclaimer: The below instructions include one way to search for claims. However, when searching for claims, multiple search options can be used to identify the claim(s) to be voided.

Overview Workflow
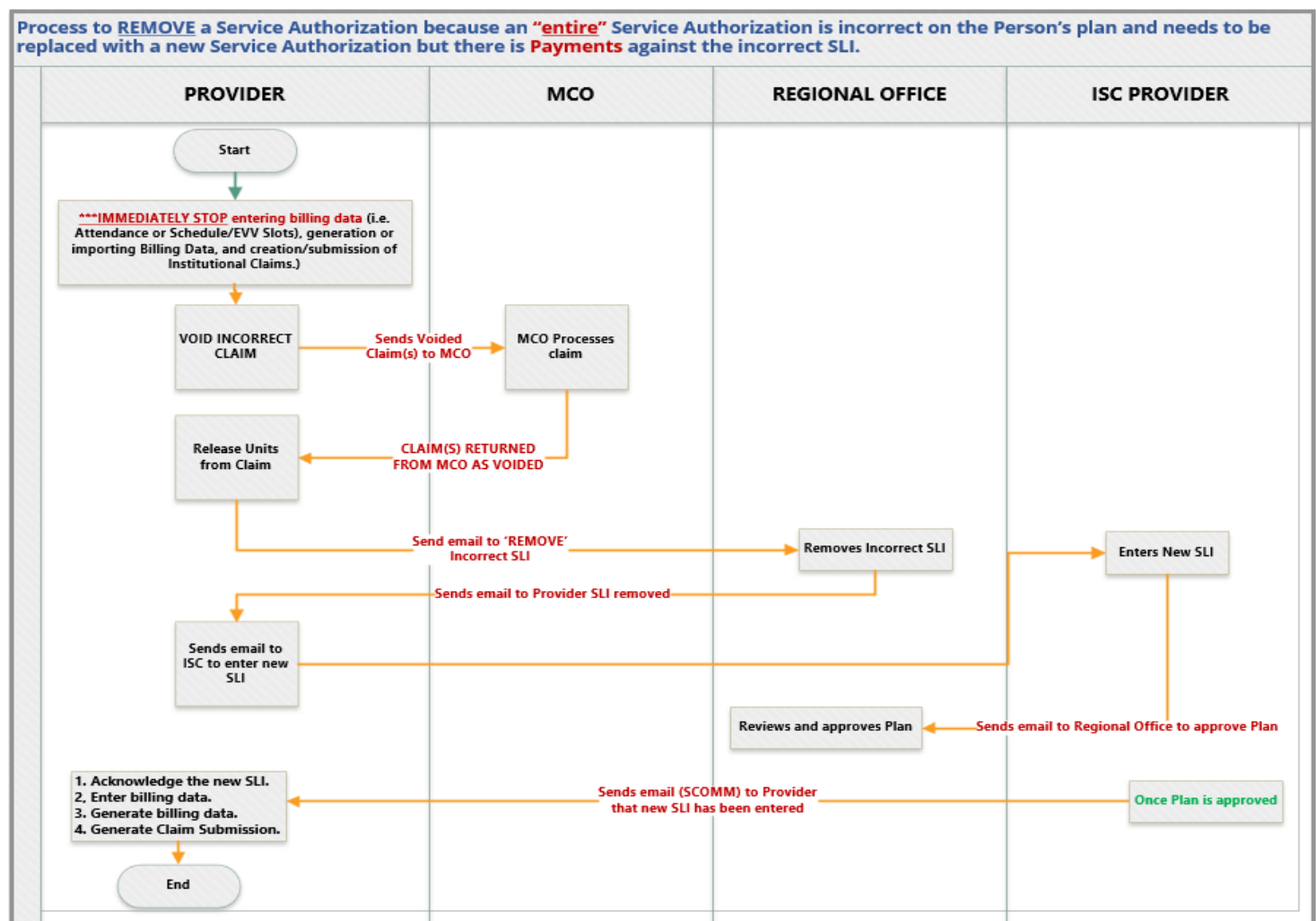
***IMMEDIATELY STOP entering billing data (i.e. Attendance or Schedule/EVV Slots), generation or importing Billing Data, and creation/submission of Institutional Claims.)

Part One – Institutional Claim Search for "Paid" or "Paid Adjusted" claims

1. On the **"Individual"** tab, locate the **"Pre Auth Service Authorization"** section and click on "Search" next to "**Service Authorization."**

2. In the "Individual" field, enter the person's name and select from the drop-down.

3. Click the **"Search"** button.

4. Review the list and locate the incorrect Service Authorization.

IMPORTANT: Make a note of the "Service From Date" and "Service To Date" for later use.

5. Click on the **"Service Authorization"** record to open.

6. Scroll down to the **"Billing Service Authorization"** section.

7. In front of the **"SA"** drag and highlight the **"Form ID"** number and select copy.
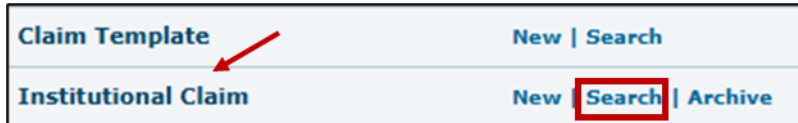

NOTE: If the pop-up for "copy" does not appear, right-click on the "Form ID" number and copy.

8. Scroll to the top of the screen and click the "Therap" icon to return to the main menu.

Therap Linked Provider   ☰ Menu

9. Click on the **"Billing"** tab.
10. Go to the **"Institutional Claim"** section and click on **"Search"** next to "Institutional Claim."

Claim Template	New | Search
Institutional Claim	New | Search | Archive

11. Search Institutional Claims using the following search criteria:
   a. In the **"Authorization ID"** field, do a **"right-click"** and paste.
   NOTE: After pasting, make sure there is not a space in front of the Authorization ID number.

   Institutional Claim Search

Claim ID	
Individual	Search
Type of Bill	
Statement Period From	MM/DD/YYYY
To	MM/DD/YYYY
Service Code	
Service Date From	MM/DD/YYYY
To	MM/DD/YYYY
Individual Medicaid Number	
Authorization ID	

   (Right-click menu shown: Emoji, Voice typing, Undo, Cut, Copy, **Paste**, Paste as plain text, Select all, Open in sidebar, Writing direction, Get image descrip..., Inspect)

   b. Using the date range from the Service Authorization fields labeled **"Service Date From"** and **"Service To Date"** fields, enter the date range in the **"Service Date From"** and the **"To"** fields on the **"Institutional Claim Search"** view.
   c. Scroll down to **"Claim Create Date From"** and **remove** the date.

   Institutional Claim Search

Claim ID	
Individual	Search
Type of Bill	
Statement Period From	MM/DD/YYYY
To	MM/DD/YYYY
Service Code	
Service Date From	
To	
Claim Create Date From	01/01/1900

   d. Scroll down and click the **"Search"** button.

Part Two - Void Claim(s)

1. In the **"Filter"** field, type **"paid."**

NOTE: These claims need to be voided before the Regional Office can remove the Service Authorization.

IMPORTANT: If multiple claims appear, export them to Excel to use as a checklist as you complete each claim.

2. Click on the first claim to open the claim.
3. Scroll down and click on the **"Update for Void**" button at the bottom of the form.

Institutional Claim Paid ⓘ

Claim Submission Details

Transaction ID	Claim Tracking ID	Claim Frequency Type Code	TCN/ICN #	Queued Date	Sent Date	Check / EFT Issue Date	Check / EFT Number	Payer Charged Amount ($)	P. P. A ($
IBTR-DEMO-N4G4GRAX8MULU	I20895045	1-Original (Admit thru Discharge Claim)	JKLMN1OP2Q34	02/14/2024 10:23:36 AM	02/29/2024 01:20:10 PM (88 days ago)	08/09/2021	720800389	$52.46	$

Claim Information

Payer BCBST: BCBST - 00390 (Inst.)

Individual Name White, Joshua (Social Security Number: 000-12-3456)

Date of Birth 01/01/1992

Gender Male

Service Lines

#	Billing Data ID	Date of Service	Service Code	Service Description	Procedure Code	Procedure Modifiers	Revenue Code	Rate Code	Rate Value	Locator Code	Unit Rate ($)
1	BILL-DEMO-N4G4GNDPPMULH	11/06/2023	G0153	SPEECH LANG HEARING 3 - 76+		U6-GN	Cast Room - 1915c-0700				$26.2

Total Claim Amount ($) 52.46

Amount Paid ($) 52.46

‹‹ Back   Cancel   Update for Replacement   Update for Void

NOTE: A pop-up message will appear asking if you wish to proceed with this action.

4. Click on the **"Yes"** button if you want to continue.

You are updating a Paid/Paid Adjusted Claim. Do you want to continue?

No   Yes

NOTE: Under the **"Claim Information"** section, the "Claim Frequency Type Code" field of the claim form will be changed to "8-Void (Void/Cancel of Prior Claim)".

For claims generated for **1915c** services...

5. In the **"Claim Information"** section, click on the (blue) link **"Original TCN/ICN Number List."**

6. On the "Original TCN/ICN Number List..."
    ➢ If only one "TCN/ICN Number" appears, click **"Add."**
    ➢ If multiple "TCN/ICN Number" appears, click the top record **"Add."**

NOTE: For the Claims generated for **KBB and State Funded** services, the <u>Original TCN/ICN Number</u> will be automatically assigned with the latest "Claim Tracking ID" of the claim form. You can skip this step.

WARNING: Be aware **BEFORE** submitting the **"VOID"** claim for approval, the corresponding **billing data** will **no longer be "editable**."

1. Once you have verified all the information on the form, scroll down and click on the **"Submit for Approval"** button.

Institutional Claim Updating ⓘ

Claim Submission Details

Transaction ID	Claim Tracking ID	Claim Frequency Type Code	TCN/ICN #	Queued Date	Sent Date	Check / EFT Issue Date	Check / EFT Number	Payer Charged Amount ($)	P. P. A ($
IBTR-DEMO-N4G4GRAX8MULU	I20895045	1-Original (Admit thru Discharge Claim)	JKLMN1OP2Q34	02/14/2024 10:23:36 AM	02/29/2024 01:20:10 PM (88 days ago)	08/09/2021	720800389	$52.46	$4

Claim Information

Payer	BCBST: BCBST - 00390 (Inst.)
Individual Name	White, Joshua (Social Security Number: 000-12-3456)
Date of Birth	01/01/1992
Gender	Male
Residence Address	123 Main Street, Anytown, TN, 12345
* **Type of Bill**	89
Claim Frequency Type Code	8-Void (Void/Cancel of Prior Claim)
Original TCN/ICN Number	I20895045

‹‹ Back   Cancel   Update   Submit for Approval

NOTE: A confirmation message will be shown on the following page upon successfully submitting the claim form.

> The form ICLM-DEMO-N782M5V87MULQ has been successfully submitted

2. Clicking on the "**Form"** link will go back to the Institutional Claim form.

> The form ICLM-DEMO-N782M5V87MULQ has been successfully submitted
>
> Back to Form | List

IMPORTANT: The claim will now be in a **"Billable"** status.

3. If you know there are **multiple** claims to void on the "Institutional Claim Search" list.
    ➢ Scroll down and click the **"<< Back"** button to return to the "Institutional Claim Search" listing.

4. Repeat the "Part Two – Void Claims" section until all "Paid" claims have been voided.
5. If you are only voiding one claim, go to the next section.

NOTE: There is no 'bulk void' because each DOS claim has a unique claim number.

Part Three- Submit Claim to MCO
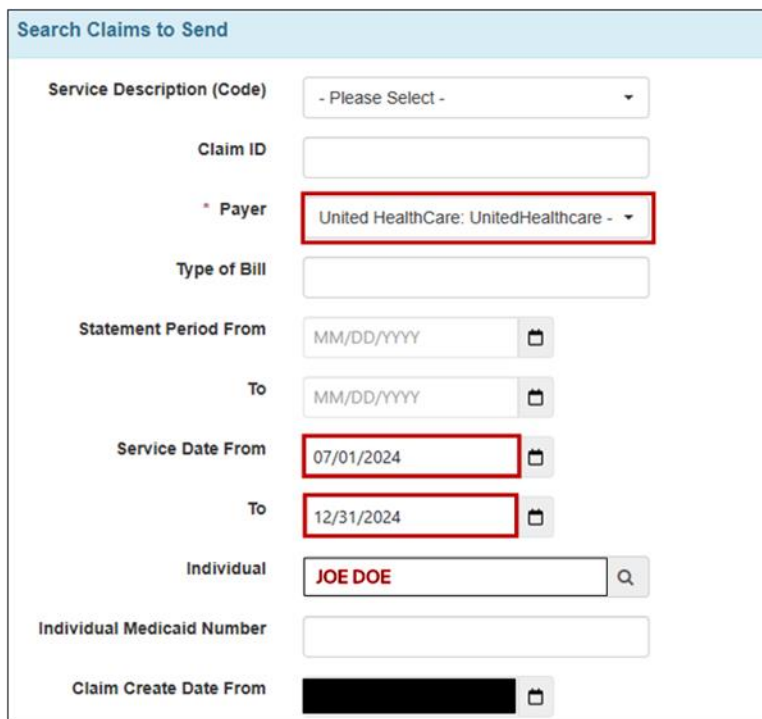
1. Scroll to the top of the screen and click the "Therap" icon to return to the main menu.

2. Click on the **"Billing"** tab.
3. Under the **"Institutional Claim"** section, locate **"Claim Submission"** and click on **"Send."**

4. (See screenshot below) On the **"Payer,"** click on the drop-down and select "Payer."
5. Using the Service Authorization date range...
   i. Enter the "From Date" in the **"Service Date From"** field.
   ii. Under the "Service Date From" field, in the **"To"** field, enter the "To Date".
6. In the **"Individual"** field, enter the person's name and select from the drop-down.
7. In the **"Claim Create Date From"** field, remove the date.
8. Scroll down and click the **"Search"** button.

9. If you exported an Excel spreadsheet, this is the time to review the list on the screen with your spreadsheet to ensure you voided all the claims. (skip this step if you did not export to Excel)
   ➢ If all claims did not appear, please go back to the "Part One" section and begin again to identify the claims you are missing and void.
10. On the result's view, click on the top **"checkbox"** in the header to submit all claims.

IMPORTANT: Check to make sure you don't have multiple pages on this view. If so, you will have to go to each page, select the top **"checkbox"** in the header, and send claims.

11. Click on the **"Send Claim"** button.
12. A **"Claim Send Summary"** will appear.

   ➢ It is **important** to review the claims listed to ensure there are no claims with (red) "X".
      i. If so, please take a screenshot for you to investigate the issue of the claim.
   ➢ If you want to send the report, click on the "Send report via SComm" button.

NOTE: After the claims are successfully submitted in Therap, if you go back and look up the claim(s)...

➢ the claims will be in a "Queued" status.
➢ the top line in the "Claim Submission Details" will have a "Queued Date" of today.
➢ Therap will send an 837i file to the MCO.

NOTE: When the claims are sent to the MCOs, the **"Sent Date"** will be displayed, and if the claim is **"accepted"** by the MCO, the claims will update to a **"Sent"** status and say **"Claim Status in 999: Accepted."**

Institutional Claim Sent ⓘ

Claim Status in 999 : Accepted

Claim Submission Details

Transaction ID	Claim Tracking ID	Claim Frequency Type Code	TCN/ICN #	Queued Date	Sent Date	Check / EFT Issue Date	Check / EFT Number	Payer Charged Amount ($)	Payer Paid Amount ($)	Claim Status
IBTR▮▮TN-NB83TYDB74TLT	I27729716	1-Original (Admit thru Discharge Claim)		09/06/2024 04:28:59 PM	09/06/2024 05:33:40 PM(More than 90 days ago)					

Part Four - MONITOR Claim(s)

IMPORTANT: Providers will monitor CLAIM(s) until the MCO processes the claim(s) and the claim(s) are in a "Voided" status.

Once the claim(s) have been voided by the MCOs or State Funded, you will need to release the units from the claim.

Part Five: Release the Units

The "Release Units" option can be applied to Claims that are in "Voided" status. The "Release Units" option will update the corresponding Billing Data Billable Units to zero (0), detach the Billing Data from the Claim, and change the status of the claim to "Deleted".

Institutional Claim Search for "Voided" claims

1. On the **"Individual"** tab, locate the **"Pre Auth Service Authorization"** section and click on "Search" next to "**Service Authorization."**
2. In the **"Individual"** field, enter the person's name and select from the drop-down.

3. Click the **"Search"** button.
4. Review the list and locate the incorrect Service Authorization.

IMPORTANT: Make a note of the "From Date" and "To Date" for later use.

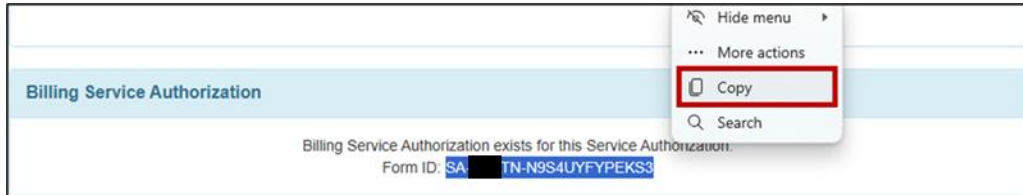5. Click on the Service Authorization record to open.

6. Scroll down to the "Billing Service Authorization" section.

Billing Service Authorization

Billing Service Authorization exists for this Service Authorization.
Form ID: SA-███TN-N9S4UYFYPEKS3

7. In front of the "SA" drag and highlight the "Form ID" number and select copy.

Billing Service Authorization

⤵ Hide menu ▸
⋯ More actions
▢ Copy
🔍 Search

Billing Service Authorization exists for this Service Authorization.
Form ID: SA-███TN-N9S4UYFYPEKS3

NOTE: If the pop-up for "copy" does not appear, right-click on the "Form ID" number and copy.

8. Scroll to the top of the screen and click the "Therap" icon to return to the main menu.

Therap® Linked Provider   ☰ Menu

9. Click on the **"Billing"** tab.
10. Go to the "Institutional Claim" section and click on **"Search."**
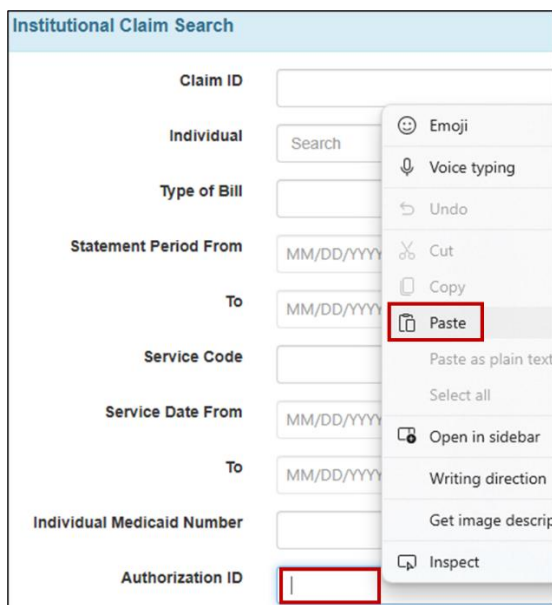
Claim Template   New | Search

Institutional Claim   New | Search | Archive

11. Search Institutional Claims using the following search criteria:
    a. In the **"Authorization ID"** field, do a "right-click" and paste.

    NOTE: After pasting make sure there is not a space in front of Authorization ID number.

Institutional Claim Search

Claim ID	
Individual	Search
Type of Bill	
Statement Period From	MM/DD/YYYY
To	MM/DD/YYYY
Service Code	
Service Date From	MM/DD/YYYY
To	MM/DD/YYYY
Individual Medicaid Number	
Authorization ID		

☺ Emoji
🎤 Voice typing
↺ Undo
✂ Cut
▢ Copy
📋 Paste
Paste as plain text
Select all
▢ Open in sidebar
Writing direction
Get image descrip
🔲 Inspect

b. Using the date range from the Service Authorization fields labeled "Service Date From" and "Service To Date" fields, enter the date range in the **"Service Date From"** and the **"To"** fields on the "Institutional Claim Search" view.

c. Scroll down to "Claim Create Date From" and **remove** the date.

d. Scroll down and click the **"Search"** button.

12. In the "Filter" field, type "void".

NOTE: These claims are the claims that need the units released before the Regional Office can remove the Service Authorization.

IMPORTANT: If multiple claims appear, export to Excel to use as a checklist as you complete each claim.

12. Click on the first claim, to open the claim.

13. Scroll down and click on the **"Release Units"** button at the bottom of the form.

A pop-up message will appear asking if you wish to proceed with this action.

14. Click on the **Yes** button.

A success message will be shown on the following page upon successfully releasing the units.

15. Clicking on the **"Form"** link will take you back to the Institutional Claim form.

The form ICLM-▇▇TN-NAX4YUAZNEPML has been successfully updated

Back to [Form] | List

NOTE: The status of the Institutional Claim will be changed to "Deleted".

NOTE: The Total Billable Units in the corresponding Billing Data will also be updated to zero (0) units.

16. If you know there were multiple claims to release the units on the "Institutional Claim Search" list
    ➢ Scroll down and click the **"<< Back"** button to return to the "Institutional Claim Search" listing.

17. Repeat the "Part Five – Release the Units" section until all "Voided" claims units have been released.
18. If you are only releasing the units on one claim, go to the next step.

19. After **ALL,** "Paid" or "Paid Adjusted" claims have been "voided" and "units released" for the incorrect Service Authorization, the Provider will notify the regional office by email to **remove** the incorrect Service Authorization from the person's PCSP.

OPTIONAL PROCESS: Once the units have been released from the claim, you can delete the billing data and remove the service data (Attendance or Schedule/EVV Slots) at this time.

Part Six: Remove the "incorrect" Service Authorization

Regional Office:

1. Remove the incorrect Service Authorization from the person's PCSP.
2. The Regional Office will reply to the Provider letting them know the Service Authorization has been removed.
3. Provider will notify the ISC to enter the new Service Authorization.

Part Seven: ISC to add Service Authorization

ISC:

1. Enters the new Service Authorization in the person's PCSP.
2. Send an email to the Regional Office to review the plan.
3. Once Service Authorization is approved, the ISC will send SCOMM to the Provider for review and acknowledgment.

Provider:

1. Provider will then…
   a. Acknowledge the new Service Authorization **(check, check, and recheck)**.
   b. Enter billing data.
   c. Generate billing data.
   d. Send the claim to MCO for payment.