SCENARIO: AN **ENTIRE** SERVICE AUTHORIZATION IS <u>INCORRECT</u> 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 "<u>entire</u>" 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, <u>do not</u> 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

- 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.

Individual	Search	Q		
From Date	MM/DD/YYYY			
To Date	MM/DD/YYYY			
Status	- Please Select -	•		

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

ervice Auth	Search					
Filter						
Form ID		Individual	0	Service ¢	From Date	To Date 🔅
				T2033-TG - SUPPORTED LIVING SPEC NEEDS ADJUSTMENT (T2033-TG)	01/01/2025	04/01/2025
				T2033-TG - SUPPORTED LIVING SPEC NEEDS ADJUSTMENT (T2033-TG)	07/01/2024	12/31/2024
				T2021-U5 - INTERMITTENT EMP & COMM PART WRAPAROUND (LEVEL 4) (T2021-U5)	01/01/2025	04/01/2025
				T2021-U5 - INTERMITTENT EMP & COMM PART WRAPAROUND (LEVEL 4) (T2021-U5)	07/01/2024	12/31/2024

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.

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.

	Ide menu Image: white
Billing Service Authorization	Сору
	Q. Search
Billing Service Authorization exists for this	s Service Authonzauon.
Form ID: SA-	YFYPEKS3

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.



- 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.
 <u>NOTE:</u> After pasting, make sure there is not a space in front of the Authorization ID number

Institutional Claim Search			
Claim ID			
Individual	Search	٢	Emoji
	ocuren	₽	Voice typing
Type of Bill		6	Undo
Statement Period From	MM/DD/YYY		Cut
То		0	Сору
10	MM/DD/YYY	Ō	Paste
Service Code			Paste as plain text
Service Date From			Select all
Service Date From	MM/DD/YYY	6	Open in sidebar
То	MM/DD/YYYY		Writing direction
Individual Medicaid Number			Get image descrip
Authorization ID		P	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		Q
Type of Bill			
Statement Period From	MM/DD/YYYY		
То	MM/DD/YYYY		
Service Code			
Service Date From			
То			
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.

	ubm												
Trans	actio	on ID	Claim Tracking ID	Claim Frequency Type Code	TCN/ICN		ueued	Sent Date	Check / EFT Issue Date	Check / EFT Number	Paye Char Amo (\$)	ged P	
IBTR-I N4G4		O- X8MULU	120895045	1-Original (Admit thru Discharge Claim)	JKLMN1	1	2/14/2024 0:23:36 M	02/29/2024 01:20:10 PM (88 days ago)	08/09/202	72080038	9 \$52.4	16 \$	
4												Þ	
im In	form	nation											
			Payer	BCBST: BCBS	T - 00390 ((Inst.)							
		Individua		BCBST: BCBS White, Joshua			er: 000-12-3	456)					
			al Name				er: 000-12-3	456)					
		Date	al Name of Birth	White, Joshua			er: 000-12-3	456)					
S	Servi	Date	al Name of Birth Gender	White, Joshua 01/01/1992			er: 000-12-3	456)					
	Servi	Date	al Name of Birth Gender	White, Joshua 01/01/1992			er: 000-12-3	456)					Unit
	Servi	Date	of Birth Gender	White, Joshua 01/01/1992			Proced				Rate Value	Locato Code	
S		Date ice Lines Billing I BILL-DE	of Birth Gender	White, Joshua 01/01/1992 Male Date of	(Social Se	curity Numbe	Proced Code	ure Proced		Code			r Rate
	#	Date ice Lines Billing I BILL-DE N4G4GN	of Birth Gender Data ID	White, Joshua 01/01/1992 Male Date of Service	(Social Se	Service Description SPEECH LANG HEARING 3	Proced Code	ure Proced Modifie	Code Cast Room 19150	Code			r Rate (\$)
	#	Date ice Lines Billing I BILL-DE N4G4GN	of Birth Gender Data ID	White, Joshua 01/01/1992 Male Date of Service	(Social Se	Service Description SPEECH LANG HEARING 3	Proced Code	ure Proced Modifie	Code Cast Room 19150	Code			r Rate (\$) \$26.
	#	Date	of Birth Gender Data ID	White, Joshua 01/01/1992 Male Date of Service 11/06/2023	(Social Sec Service Code G0153	Service Description SPEECH LANG HEARING 3	Proced Code	ure Proced Modifie	Code Cast Room 19150	Code			r Rate (\$) \$26.

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 "<u>Claim Frequency Type Code"</u> field of the claim form will be changed to "8-Void (Void/Cancel of Prior Claim)".

Claim Information	
Payer	Amerigroup: WellPoint - TNIDD (Inst.)
Individual Name	MORRIS, JORDAN (Social Security Number: 432952532)
Date of Birth	04/06/1994
Gender	Male
Residence Address	131 MCGEE LOOP, JACKSON, TN, 38305-9576
* Type of Bill	89
Claim Frequency Type Code	8-Void (Void/Cancel of Prior Claim)

For claims generated for **<u>1915c</u>** services...

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

Claim Information	
Payer	United HealthCare: UnitedHealthcare - 95378 (Inst.)
Individual Name	Doe, Joe (Social Security Number: 123-45-6789
Date of Birth	07/09
Gender	Male
Residence Address	, TN, 38555-8633
* Type of Bill	89
Claim Frequency Type Code	8-Void (Void/Cancel of Prior Claim)
Original TCN/ICN Number	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."

TCN #	Queued Date	Sent Date	Action
274232820000061	07/23/2024	07/23/2024	Add
274232820001215	07/23/2024	07/23/2024	Add
274232820000556	07/23/2024	07/23/2024	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 <u>"VOID"</u> claim for approval, the corresponding <u>billing data</u> will <u>no longer be "editable</u>."

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

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	120895045	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
									Þ
im Information									
	Payer	BCBST: BCBS	T - 00390 (Inst.)						
Individua	-		T - 00390 (Inst.) (Social Security Nur	mber: 000-12-0	3456)				
	al Name			mber: 000-12-3	3456)				
	al Name of Birth	White, Joshua		mber: 000-12-3	3456)				
	al Name of Birth Gender	White, Joshua 01/01/1992 Male			3456)				
Date Residence A	al Name of Birth Gender	White, Joshua 01/01/1992 Male	(Social Security Nur		3456)				
Date Residence A	al Name of Birth Gender Address e of Bill	White, Joshua 01/01/1992 Male 123 Main Stree 89	(Social Security Nur	45	3456)				

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



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



<u>IMPORTANT</u>: The claim will now be in a **"Billable"** status.

im 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 Charge Amour (\$)
IBTR TN- N9L4Q4YZBELQR	124101376	1-Original (Admit thru Discharge Claim)	24L329031700	07/18/2024 05:38:46 PM	07/18/2024 09:18:21 PM(More than 90 days ago)	07/28/2024		\$497.2

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

_		
« Back	Cancel	

- 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."

I	Billing	
	Inst	titutional Claim
	Service Authorization	New Search Renewal Search Applied Rate History Search Archive
	Billing Data	New Search Summary Archive Bulk Delete
	Billing Conversion	ISP Billing (Using Unit Calculation Rule) Case Note Billing EVV Billing
	Claim Template	New Search
	Institutional Claim	New Search Archive
	Claim Submission	Send Bulk Send Transaction Search

- 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.

Service Description (Code)	- Please Select -		•
Claim ID			
* Payer	United HealthCare:	UnitedHealthc	are - 🔻
Type of Bill			
Statement Period From	MM/DD/YYYY	٥	
То	MM/DD/YYYY		
Service Date From	07/01/2024	Ö	
То	12/31/2024	Ö	
Individual	JOE DOE		Q
ndividual Medicaid Number			
Claim Create Date From		0	

- 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.

Filt	er	You have	e selected 0) items.		
	Claim ID	Payer	Type of Bill	Statement Period From	Statement Period To	Individual
	ICLM- NAX4 YDEQLV	UnitedHealthcare	89	07/30/2024	07/30/2024	
	ICLM- NAX4 YAEQL7	UnitedHealthcare	89	07/27/2024	07/27/2024	
	ICLM- NAX4 ZNEPML	UnitedHealthcare	89	08/01/2024	08/01/2024	
	ICLM-TN-	UnitedHealthcare	89	08/11/2024	08/11/2024	

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.

titutional Cl		lea U						
Transaction ID	Claim Tracking ID	Claim Frequency Type Code	TCN/ICN #	Queued Date	Sent Date	Check / EFT Issue Date	Check / EFT Number	Paye Char Amo (\$)
IBTR- P4F42X3YFMULT	126112324	8-Void (Void/Cancel of Prior Claim)		02/13/2025 04:02:00 PM				
IBTR-TN- N9L4Q4YZBELQR	124101376	1-Original (Admit thru Discharge Claim)	24L329031700	07/18/2024 05:38:46 PM	07/18/2024 09:18:21 PM(More than 90 days ago)	07/28/2024		\$497

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."

aim Status in 999 : /	Accepted									
uni status in see . /	Accepted									
laim Submission	Details									
						Check		Payer	Payer	
	Claim Tracking	Claim Frequency	TCN/ICN	Queued		/ EFT Issue	Check / EFT	Charged Amount	Paid Amount	Claim
Transaction ID	ID	Type Code	#	Date	Sent Date	Date	Number	(\$)	(\$)	Status
IBTR TN-	127729716	1-Original		09/06/2024	09/06/2024					
NB83TYDB74TLT		(Admit thru		04:28:59	05:33:40					
		Discharge		PM	PM(More					
		Claim)			than 90					

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."**

Form ID					
Individual	Search		Q		
From Date	MM/DD/YYYY	Ö			
To Date	MM/DD/YYYY				
Status	- Please Select -		•		
ction					
lection					

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.

Filter						
Form ID	-	Individual	٥	Service ¢	From Date	To Date
				T2033-TG - SUPPORTED LIVING SPEC NEEDS ADJUSTMENT (T2033-TG)	01/01/2025	04/01/202
				T2033-TG - SUPPORTED LIVING SPEC NEEDS ADJUSTMENT (T2033-TG)	07/01/2024	12/31/202
				T2021-U5 - INTERMITTENT EMP & COMM PART WRAPAROUND (LEVEL 4) (T2021-U5)	01/01/2025	04/01/202
				T2021-U5 - INTERMITTENT EMP & COMM PART WRAPAROUND (LEVEL 4) (T2021-U5)	07/01/2024	12/31/202

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.

	Mide menu ···· More actions
Billing Service Authorization	Сору
	Q Search
	kists for this Service Authonzauon. IN-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.



- 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	0	Emoji
	ocarcii	Ŷ	Voice typing
Type of Bill		5	Undo
Statement Period From	MM/DD/YYY		Cut
То		D	Сору
10	MM/DD/YYY	Ō	Paste
Service Code			Paste as plain text
Service Date From	MM/DD/YYYY		Select all
Service Date From		Cò	Open in sidebar
То	MM/DD/YYYY		Writing direction
Individual Medicaid Number			Get image descrip
Authorization ID		Ģ	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.

Institutional Claim Search		
Claim ID		
Individual	Search	Q
Type of Bill		
Statement Period From	MM/DD/YYYY	Ċ
То	MM/DD/YYYY	
Service Code		
Service Date From		—
То		Ö
Claim Create Date From	01/01/1900	Ċ

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".

Institutional Claim 🕞	eted O
Claim Information	
Payer	Amerigroup: WellPoint - WLPNT (Inst.)
Individual Name	Doe, Joe (Social Security Number: 123-45-6789
Date of Birth	
Gender	
Residence Address	
Type of Bill	89
Claim Frequency Type Code	1-Original (Admit thru Discharge Claim)
Service Lines	
No Service Lines found.	
Total Claim Amount	(\$) 0.00
Amount Paid	
Check / EFT Num	ber
Check / EFT Issue D	late
Patient Responsibility Amo	unt (\$)
« Back Cancel	

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 <u>ALL</u>, "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 <u>remove</u> 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.