



## HHAExchange Lunch-and-Learn Webinar *Billing Review “On Hold” Reasons*

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# Today's Agenda: *Billing Review “On Hold”*

## Billing Review: Root Causes for “On Hold”

### 2 Billing Review “On Hold” Reasons

- Reason #1: *Pending Billing of Additional Shifts on Same Day*
- Reason #2: *Visits on Same Day/Service Code must be billed on same Invoice*



# Billing Review: Root Causes for “On Hold”

# Billing Review: Before Claims Finalized

Scrubbing Steps: Cleaning Claims before Billing

HHAEExchange Provides List of Possible Warnings/Issues

- **Prebilling:** Before you try to bill
- **Billing Review:**
  - *Claims Held (with Reasons)*
  - *Invoices will **not** be sent*

# Billing Review: Root Causes (Unrealized \$\$)

## Missed Visits or Duplicate Visit (*EVV Agencies*)

- Visit is Duplicate, or did not take place, but schedule still on Calendar
- 2 Options: Delete the Visit --or-- Mark the Visit as a *Missed Visit*

## Authorization Issue (*Overutilization*)

- First Visit(s) = Within Authorization (*Green*)
- Later Visit(s) = Outside/Past Authorization Limits (*Pink*)
- 2 Options: Adjust Visit Confirmation Times --or-- Speak with MCO (Inc. Auth)

## Solution

- Run Billing Review *Every Day* – After creating New Invoice Batch
- Run Billing Review *Every Day* – PERIOD!





**“On Hold” Reason #1:**  
*Pending Billing of Additional Shifts on Same Day*

# Pending Billing of Additional Shifts on Same Day

## Scenario #1

- Invoice Generated for one shift
- Another shift on the same day is *confirmed* but not *Invoiced* (B: N)

## Scenario #2

- Invoice Generated for one shift
- Another shift on the same day is *scheduled* but not yet *Confirmed*

## Why on Hold?

- Could be seen as a duplicate visit if billed in separate invoices
- For *Split Shifts*, all visits must be confirmed and invoiced *together*

# Pending Billing of Additional Shifts on Same Day

## Step 1: Billing Review → Summary View

- Hold Reason: *Pending billing of additional shifts on same day*
- Total Amount on Hold: Unrealized Revenue

**Billing Review**

**Billing Review Search**

View:  Summary View  Detail View ?

Group By: MCO

MCO: All

Member Team: All

Coordinator: All

Hold Reason:  Pending billing of additional shifts on same day

Member First Name:

Member Last Name:

Visit From Date:

Visit To Date:

Display Zero Results:  ?

Batch Number:

Invoice Number:

Invoice From Date:

Invoice To Date:

Service Code:

**Search Results (3)**

MCO <input type="text"/>	Total Visits	Total Visits (Hourly)	Total Visits (Daily)	Total Visits (Visit)	Total Amount on Hold
MCO Community Health Plan	48	48	0	0	\$20,060.96
Group USA Health Plan	15	15	0	0	\$1,464.00
Caring Network Payer	12	12	0	0	\$6,199.72
<b>Total:</b>	<b>75</b>	<b>75</b>	<b>0</b>	<b>0</b>	<b>\$27,724.68</b>



# Pending Billing of Additional Shifts on Same Day

## Step 2: Billing Review → Detail View

- **Hold Reason:** *Pending billing of additional shifts on same day*
- **Visit Dates:** Indicates which visits to review (some billed, some not)

**Billing Review** Limited 6.2.1.0 TELXWEB

**Billing Review Search**

View:  Summary View  **Detail View** i

MCO:  Member Team:  Coordinator:  **Hold Reason:**

Member First Name:  Member Last Name:  Visit From Date:

Batch Number:  Invoice Number:  Invoice From Date:   Visit To Date:

Service Code:  Invoice To Date:

**Search Results (212)** Page 1 of 5 | [Next](#) [Last](#)

Invoice Number	Invoice Date	Admission ID	Member Name	MCO	Coordinator	Visit Date	Service Code	Units	Amount on Hold	Hold Reasons
4	01/11/2018		ED	Caring Network Payer	Default	01/01/2018	W1793	20.00	\$97.40	Pending billing of additional shifts on same day
7	01/11/2018		ED	Caring Network Payer	Default	01/04/2018	W1793	4.00	\$19.48	Pending billing of additional shifts on same day
7	01/11/2018		ED	Caring Network Payer	Default	01/04/2018	W1793	16.00	\$77.92	Pending billing of additional shifts on same day

# Pending Billing of Additional Shifts on Same Day

## Step 3: Visit View (Calendar)

**Last 3 Authorization**

Auth. #	From Date	To Date	Service Category	Service Type	Service Code	Authorization Type	MCO	Notes	Visits/Invoice
	01/01/2018	06/30/2018	Home Health	PCA	W1793	Weekly <b>Weekly Hours: 35.25</b>	Caring Network Payer		<a href="#">Update</a>

**Calendar** [Rollover History](#)

Month:  Year:

Saturday	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday
30		31	1	2	3	4
		<div style="border: 1px solid red; padding: 5px;"><p><b>S:0430-0530</b> V:- B: <b>N</b> H: A:</p></div>	<div style="border: 1px solid red; padding: 5px;"><p><b>S:0700-0800</b> V:0700-0800 B: Y (01:00)</p></div>	<div style="border: 1px solid red; padding: 5px;"><p><b>S:0900-1930</b> V:0900-1930 B: Y (10:30)</p></div>	<div style="border: 1px solid red; padding: 5px;"><p><b>S:0700-0800</b> V:0700-0800 B: Y (01:00)</p></div>	<div style="border: 1px solid red; padding: 5px;"><p><b>S:0930-1430</b> V:0930-1430 B: Y (05:00)</p></div>
		<div style="border: 1px solid red; padding: 5px;"><p><b>S:1330-1830</b> V:1330-1830 B: Y (05:00)</p></div>	<div style="border: 1px solid red; padding: 5px;"><p><b>S:1300-2100</b> V:1300-2100 B: Y (08:00)</p></div>		<div style="border: 1px solid red; padding: 5px;"><p><b>S:1100-1500</b> V:1100-1500 B: Y (04:00)</p></div>	
					<div style="border: 1px solid red; padding: 5px;"><p><b>S:1700-2100</b> V:- B: <b>N</b> H: A:</p></div>	



## “On Hold” Reason #2:

*Visits on Same Day/Service Code must be billed on same invoice*

# Visits on Same Day/Service Code...

## Scenario #1: *Addressed Automatically Overnight*

- 2 Visits on different invoices for **Same Day** (Automatically Merged)
- HHAeXchange merges Invoices, using most recent Invoice #

## Scenario #2: *Requires Rebilling*

- 2 Visits on different invoices on **Different Days** (First one already *Billed*)
- 2<sup>nd</sup> Visit remains “on hold” until first one returns after adjudication

**Please view the *Rebilling in HHAeXchange* recorded webinar, available on the TRAINING page of your Provider Info Center**

# Visits on Same Day/Service Code...

## Step 1: Billing Review → Summary View

- **Hold Reason:** *Visits on same day/service code must be billed on same invoice*
- **Total Amount on Hold:** Unrealized Revenue

**Billing Review** Limited 6.2.1.0 TELXWEB01

**Billing Review Search**

View:  Summary View  Detail View i

Group By: MCO v MCO: All v Member Team: All v Coordinator: All v

**Hold Reason:**  Visits on same day/service code must be billed on same invoice

Member First Name:  Member Last Name:  Visit From Date:  c

Invoice From Date:  c Display Zero Results:  i Batch Number:  Invoice Number:

Invoice To Date:  c Service Code:

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**Search Results (2)**

MCO <span style="font-size: small;">^</span>	Total Visits	Total Visits (Hourly)	Total Visits (Daily)	Total Visits (Visit)	Total Amount on Hold
Group USA Health Plan	8	8	0	0	\$751.52
Caring Network Payer	14	14	0	0	\$1,182.60
<b>Total:</b>	<b>22</b>	<b>22</b>	<b>0</b>	<b>0</b>	<b>\$1,934.12</b>



# Visits on Same Day/Service Code...

## Step 2: Billing Review → Detail View

- **Hold Reason:** *Visits on same day/service code must be billed on same invoice*
- **Visit Dates/Units:** Indicates which visit(s) to review  
**Visit “On Hold”:** *Date = 01/03/2018; Units = 4 (01:00)*

Billing Review Limited 6.2.1.0 TELXWEB

**Billing Review Search**

View:  Summary View  Detail View ⓘ

MCO:  Member Team:  Coordinator:  Hold Reason:

Member First Name:  Member Last Name:  Visit From Date:

Batch Number:  Invoice Number:  Invoice From Date:  Visit To Date:

Service Code:  Invoice To Date:

**Search Results (14)**

Invoice Number	Invoice Date	Admission ID	Member Name	MCO	Coordinator	Visit Date	Service Code	Units	Amount on Hold	Hold Reasons
55	01/17/2018	1	J,BERT	Caring Network Payer	Default	01/03/2018	W1793	4.00	\$17.52	Visits on same day/service code must be billed on same invoice



# Visits on Same Day/Service Code...

## Step 3: Visit View (Calendar)

**Last 3 Authorization**

Auth. #	From Date	To Date	Service Category	Service Type	Service Code	Authorization Type	MCO	Notes	Visits/Invoice
8	01/01/2018	06/30/2018	Home Health	PCA	W1793	Weekly Weekly Hours: 40.00	Caring Network Payer		Update

**Calendar** [Rollover History](#)

Month:  Year:

Saturday	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday
30	31	1	2	3	4	5
		<b>S:1200-1830</b> <u>V:1200-1830</u> B: Y (06:30)	<b>S:1200-1830</b> <u>V:1200-1830</u> B: Y (06:30)	<b>S:1200-1515</b> <u>V:1200-1515</u> B: Y (03:15) <b>S:1515-1615</b> <u>V:1515-1615</u> B: Y (01:00) <b>S:1615-1945</b> <u>V:1615-1945</u> B: Y (03:30)	<b>S:1200-1830</b> <u>V:1200-1830</u> B: Y (06:30)	<b>S:1200-1830</b> <u>V:1200-1830</u> B: Y (06:30)

# Visits on Same Day/Service Code...

## Step 4: Verify *Bill Info Tab*

Visit Duration: 03:15 - **Not** Held

Wednesday	
S:1200-1515 V:1200-1515 B Y (03:15)	X
S:1515-1615 V:1515-1615 B Y (01:00)	X
S:1615-1945 V:1615-1945 B Y (03:30)	X

Schedule Visit Info **Bill Info**

- Entering \$0 in the Pay Rate field will not automatically create a non-payable visit. Hours should be adjusted to zero.

**Primary Bill To:**

Primary bill to:	Caring Network Payer
Service Code:	W1793
Bill Type:	Hourly
Service Hours:	03:15
TT Hours:	
OT. Hours:	
Billable Hours:	03:15
Billable Units:	13.00
Bill rate:	\$17.52
Total:	\$56.94
Billed:	Y
Invoice#:	600076
Invoice Creation Date:	01/11/2018
Billing Hold:	No
TRN Number:	
E-billing Batch #:	CLM1306144750000

Save

# Visits on Same Day/Service Code...

## Step 4: Verify *Bill Info Tab*

Visit Duration: 03:30 – **Not** Held

Wednesday	
S:1200-1515	3
V:1200-1515	
B Y (03:15)	X
S:1515-1615	
V:1515-1615	
B Y (01:00)	X
S:1615-1945	
V:1615-1945	
B Y (03:30)	X

Schedule Visit Info **Bill Info**

- Entering \$0 in the Pay Rate field will not automatically create a non-payable visit. Hours should be adjusted to zero.

**Primary Bill To:**

Primary bill to:	Caring Network Payer
Service Code:	W1793
Bill Type:	Hourly
Service Hours:	03:30
TT Hours:	
OT. Hours:	
Billable Hours:	03:30
Billable Units:	14.00
Bill rate:	\$17.52
Total:	\$61.32
Billed:	Y
Invoice#:	600076
Invoice Creation Date:	01/11/2018
Billing Hold:	No
TRN Number:	
E-billing Batch #:	CLM13061447500001

Save

# Visits on Same Day/Service Code...

## Step 4: Verify *Bill Info Tab*

Visit Duration: 01:00 – **Held in Billing Review**

Wednesday	
S:1200-1515	3
V:1200-1515	
B Y (03:15)	X
S:1515-1615	
V:1515-1615	
B Y (01:00)	X
S:1615-1945	
V:1615-1945	
B Y (03:30)	X

Schedule Visit Info **Bill Info**

- Entering \$0 in the Pay Rate field will not automatically create a non-payable visit. Hours should be adjusted to zero.

**Primary Bill To:**

Primary bill to:	Caring Network Payer
Service Code:	W1793
Bill Type:	Hourly
Service Hours:	01:00
TT Hours:	
OT. Hours:	
Billable Hours:	01:00
Billable Units:	4.00
Bill rate:	\$17.52
Total:	\$17.52
Billed:	Y
Invoice#:	601355
Invoice Creation Date:	01/17/2018
Billing Hold:	No
TRN Number:	
E-billing Batch #:	

Save

→ Different *Invoice# & Invoice Creation Date*