CareWhen Lite Training

Invoices and Claims

CareWhen Lite is a simplified version of CareWhen. Functionality and features discussed in this training may only be available by upgrading to the full version of CareWhen. Contact your DWIHN Administrator for upgrade options.

CareWhen Invoices and Claims

Once Visits have been completed and approved in CareWhen, the balance will be communicated to the responsible Payors via Invoices or Claims.

Payors in CareWhen handle billing differently depending on the Payor type.

Invoicing for Private Pay is only available in the full version of CareWhen. Insurance claims billing in CareWhen Lite is limited.

Private Pay

Private Pay billing uses **invoices** that are sent directly to the Client (or a designated responsible party). Payments are returned directly to the Agency.

The format of these invoices is setup from the “Invoice Settings” area under Settings.

Insurance / Medicaid / VA

For payment through private insurance, or a government option such as Medicaid, billing is handled through CareWhen via **claims**. Claim formatting will be dictated by the payor’s billing companion guide and is controlled from tabs on both the “Payors” area and the “Insurance Company” area.

CareWhen – Invoices

Invoices are bills generated within CareWhen, that are sent directly to a Client or applicable Responsible Party.

Invoices documents may be downloaded from CareWhen and mailed to the recipient or emailed directly.

Note: Private Pay is the most used instance of invoice-based billing, but invoices may be generated for any Payor marked as "Can Invoice" during Payor setup.

Invoicing for Private Pay is only available in the full version of CareWhen.

AssuriCare
100 5th Ave
Waltham, MA 02451-8703

AssuriCare
The Verification Company

Master Card	Visa
Card Number	Amount
Signature	Exp. Date

Phone Fax
Tax ID # 99-9999999

99212-2868

Invoice #1009	
Account #8.N	Page 1 of 1
Due Date: 6/5/2020	Invoice Date: 5/21/2020

Charolette Carr
521 N Argonne Rd
Spokane Vly, WA 99212-2868

AssuriCare
100 5th Ave
Waltham, MA 02451-8703

RE: Charolette Carr

Amount Enclosed: ____________________

Date	Description	Code	Time	Quantity	Rate	Amount	Tax
3/23/2020	Live In Day - Kristine K CNA Bathing- assist with shower - Dressing (R) -		09:30 AM - 09:45 AM	1.00	$200.00	$200.00	

Thank you so much for trusting Assuricare, we appreciate your business!!

TOTAL: $200.00
TAX TOTAL: $0.00

INVOICE TOTAL: $200.00

A sample invoice created in CareWhen

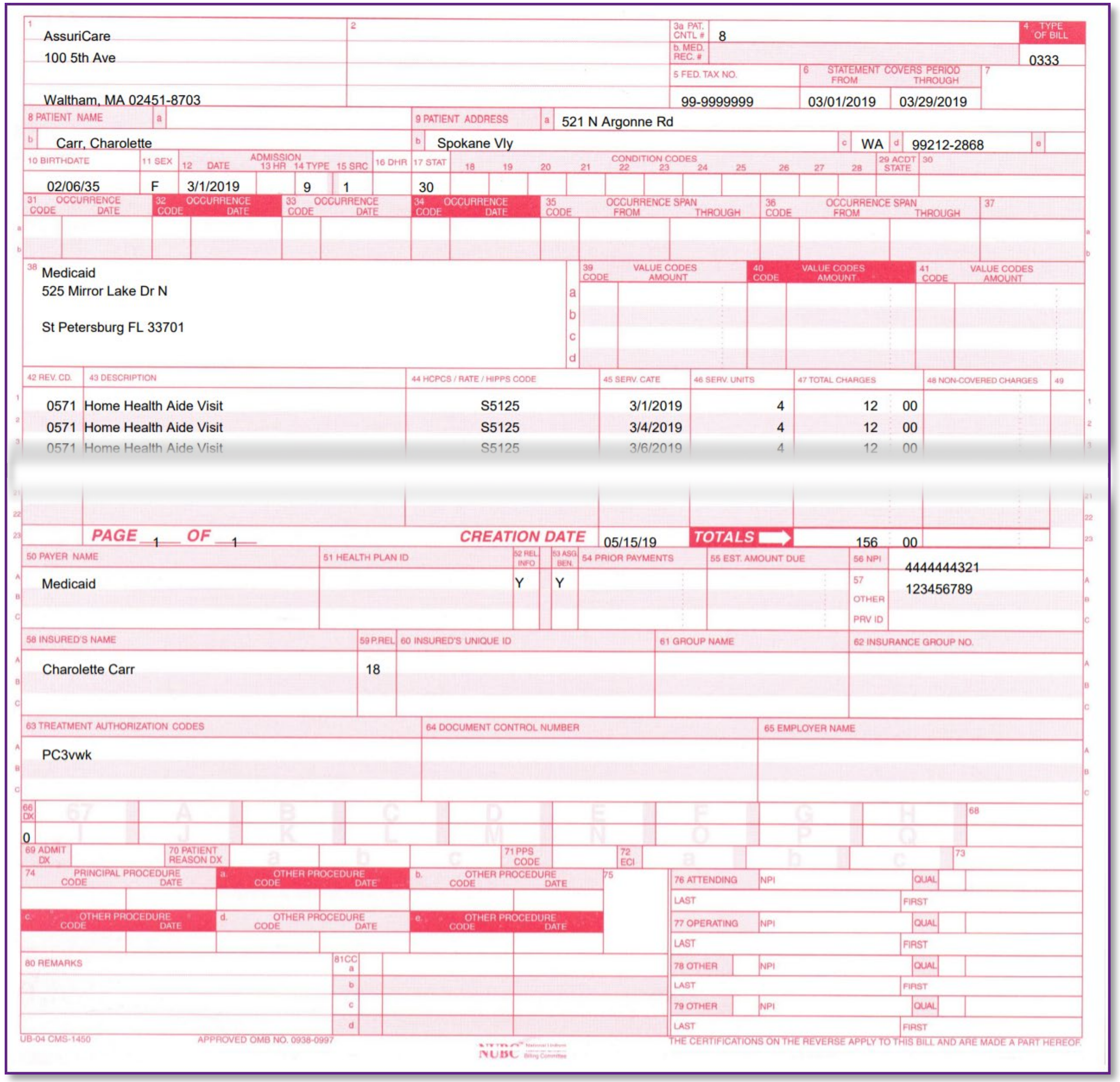
AssuriCare

CareWhen – Claims

Claims are bills sent to Payors that don't utilize invoicing, such as a Private Insurance company or Medicaid. Claims can be output from CareWhen in two forms that will vary based on the Payors needs:

- **Print** (such as a UB04 claim document)
- **Digital** (such as an EMC file compiled in CareWhen and uploaded to a Payor)

Claims in CareWhen Lite are limited to DWIHN-specific billing options.



A sample UB04 claim generated in CareWhen

CareWhen Invoices and Claims – Invoice Setup

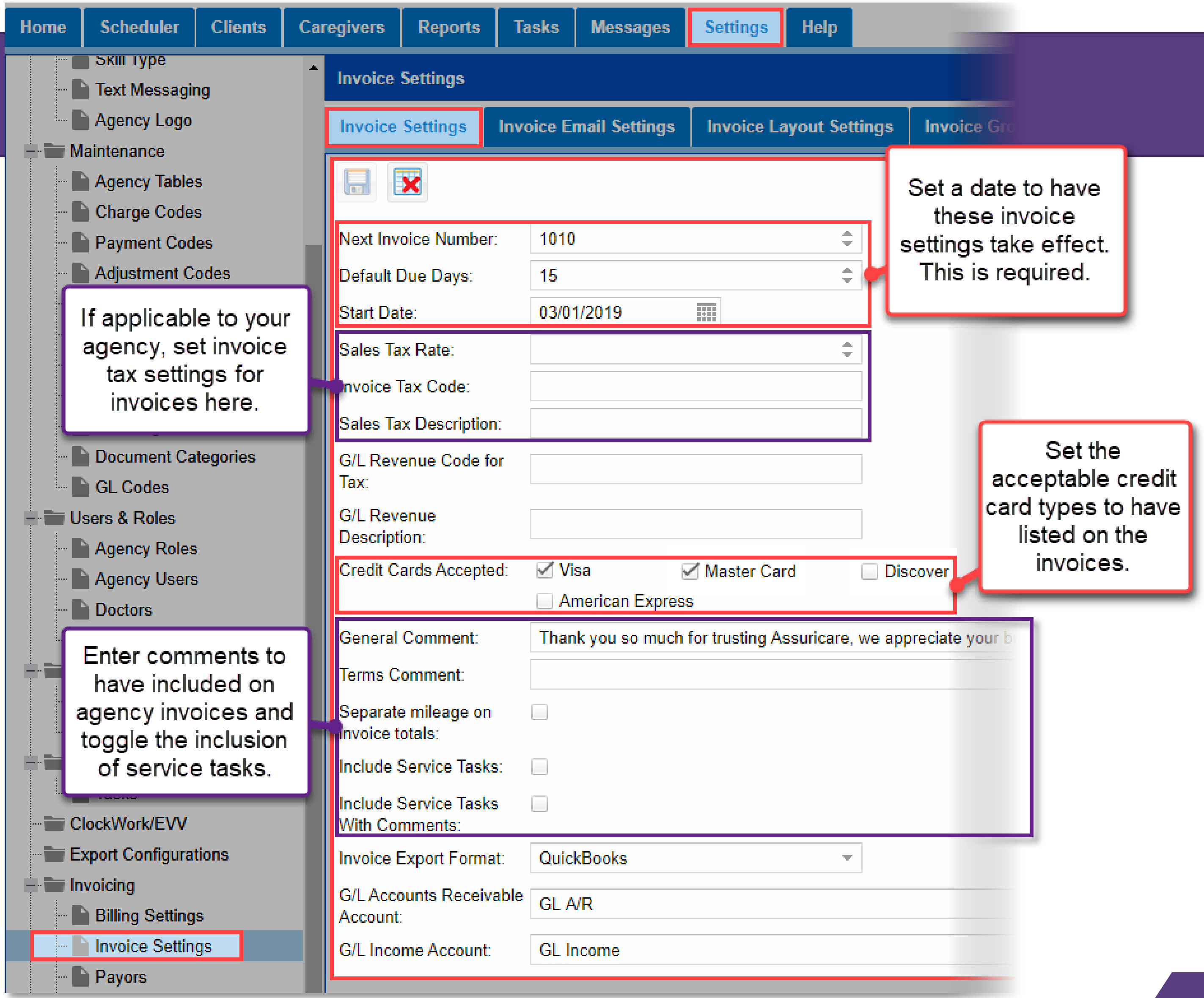
Invoice Settings

General Invoice settings are controlled from the Invoice Settings area of the Settings tab.

Settings entered here will apply to all instances of invoice-based billing that occurs within CareWhen.

Essential Configurations

- A Start Date must be selected. This will set a date that the selected invoice settings will take effect
- If Credit Card payments are accepted, acceptable CC types should be denoted here

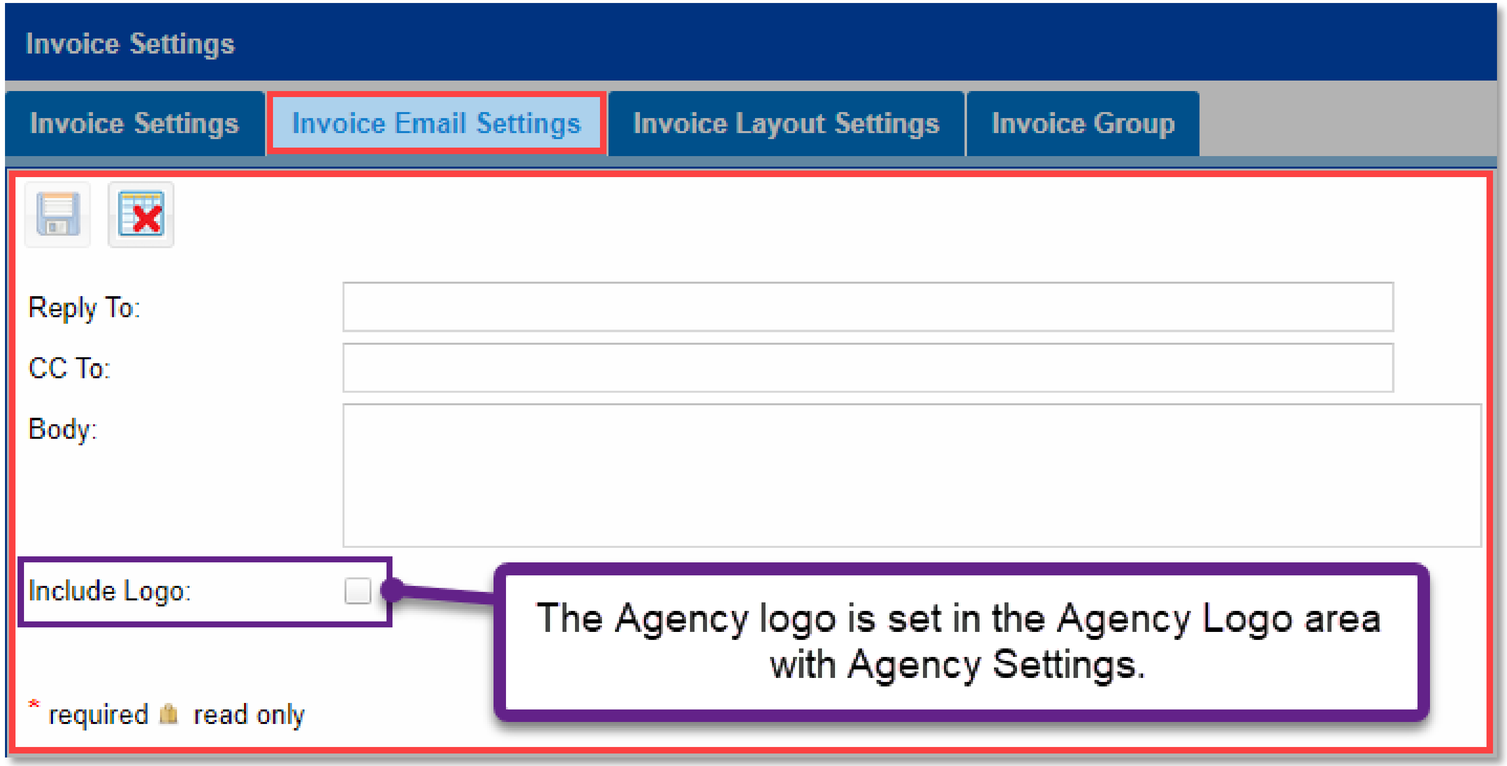


AssuriCare

CareWhen Invoices and Claims – Invoice Setup

Invoice Email Settings

Use the Invoice Email Settings tab to configure the default formatting of invoice emails that are sent to Clients. Configure the body of the email and set the default reply email address for your agency.



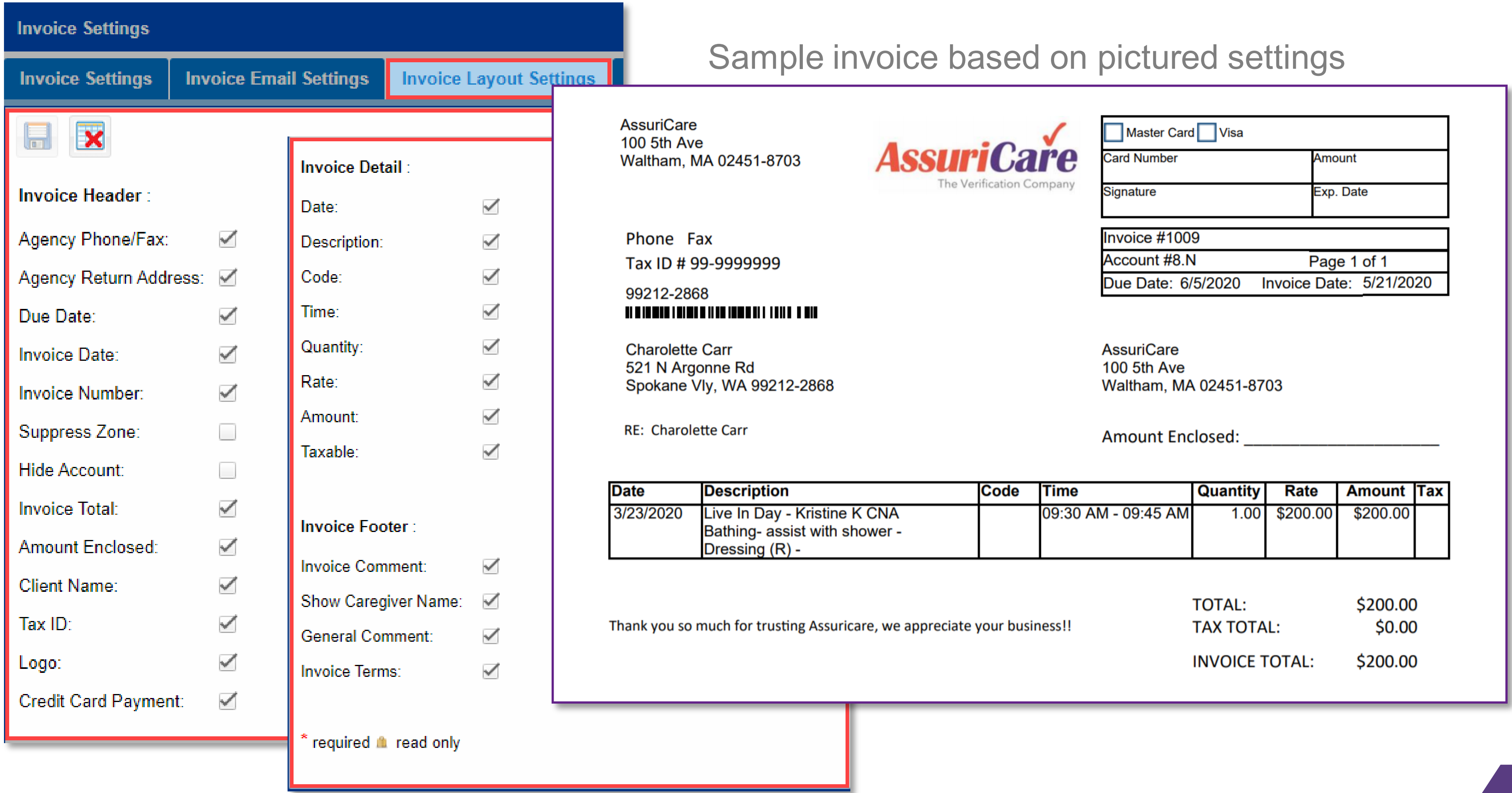
CareWhen Invoices and Claims – Invoice Setup

Invoice Layout Settings

The Invoice Layout Settings area is used to toggle various formatting options that will determine the included content of the header, details, and footer sections of invoices.

Many options are toggled on by default.

Sample invoice based on pictured settings



AssuriCare

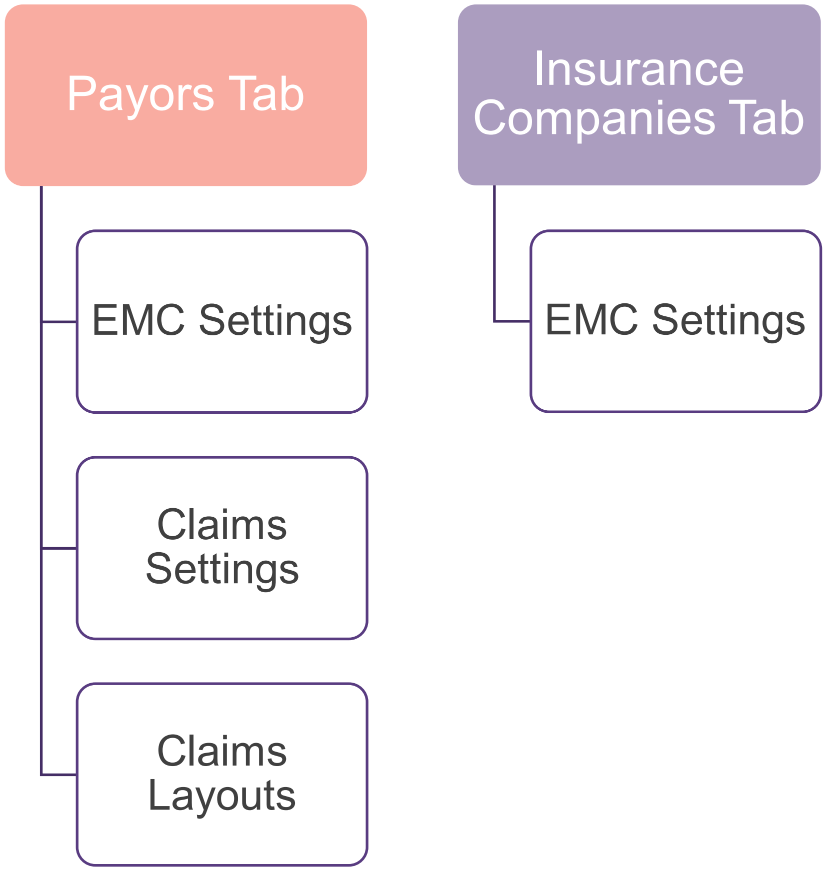
CareWhen Invoices and Claims – Claims Setup

Claims Setup Overview

Unlike Invoices, Claims setup occurs on a per-Payor / Insurance Company basis. These settings are controlled across four areas:

As each Payor will have different claims requirements, follow the details of the payor's billing companion guide to fill in the required settings and options available.

Note: For the sake of example, the following slides use some of the more commonly used fields. If additional help is required, please contact AssuriCare for further assistance.

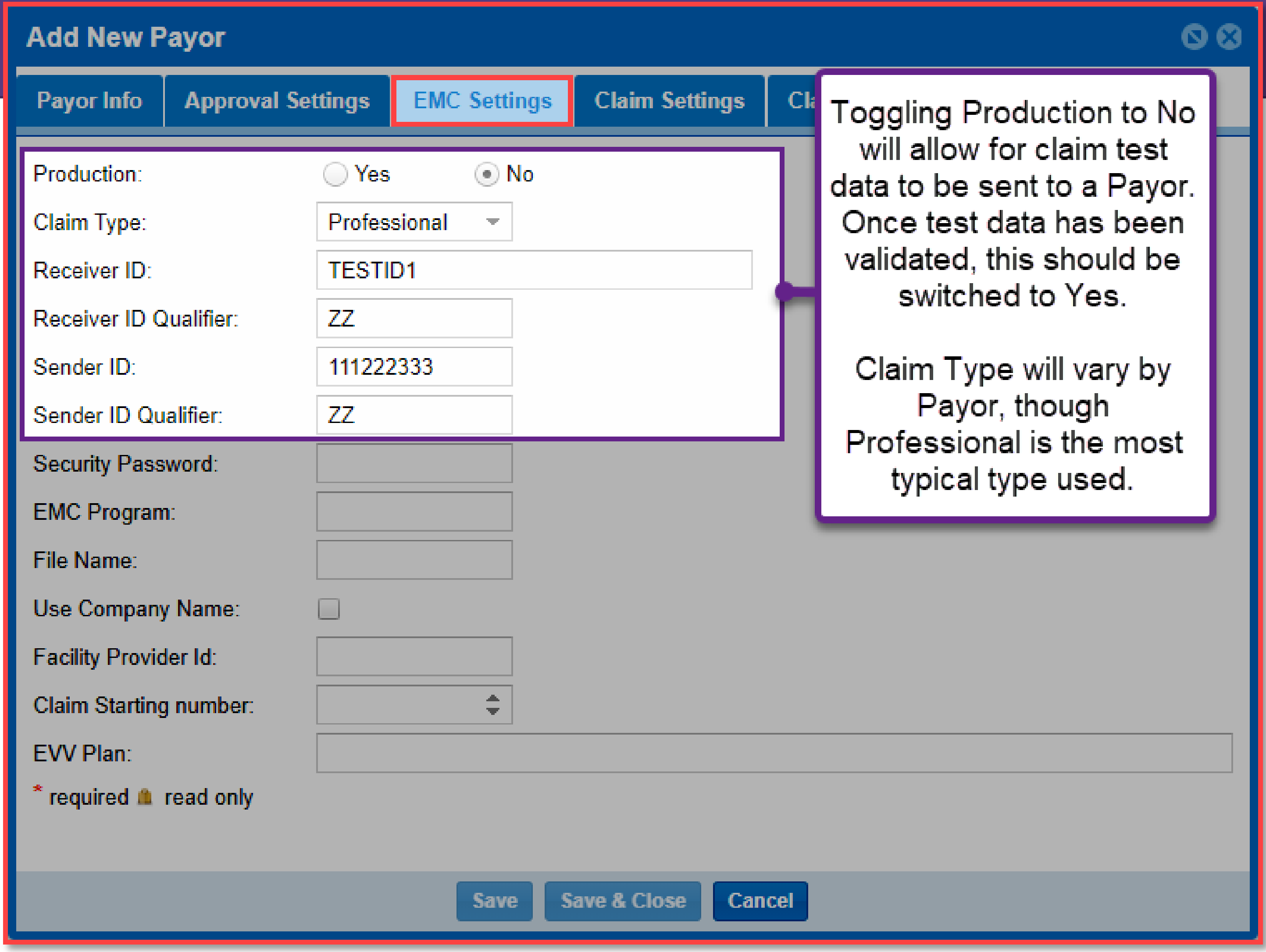


CareWhen Invoices and Claims – Claims Setup

Payor EMC Settings

The EMC (Electronic Media Claims) Settings tab within Payor setup contains numerous input fields that will be used to identify where Claims will be sent electronically.

As with all Claims-related settings, these will be outlined by the Payor's billing companion guide or dictated by the Payor directly.



Toggling Production to No will allow for claim test data to be sent to a Payor. Once test data has been validated, this should be switched to Yes.

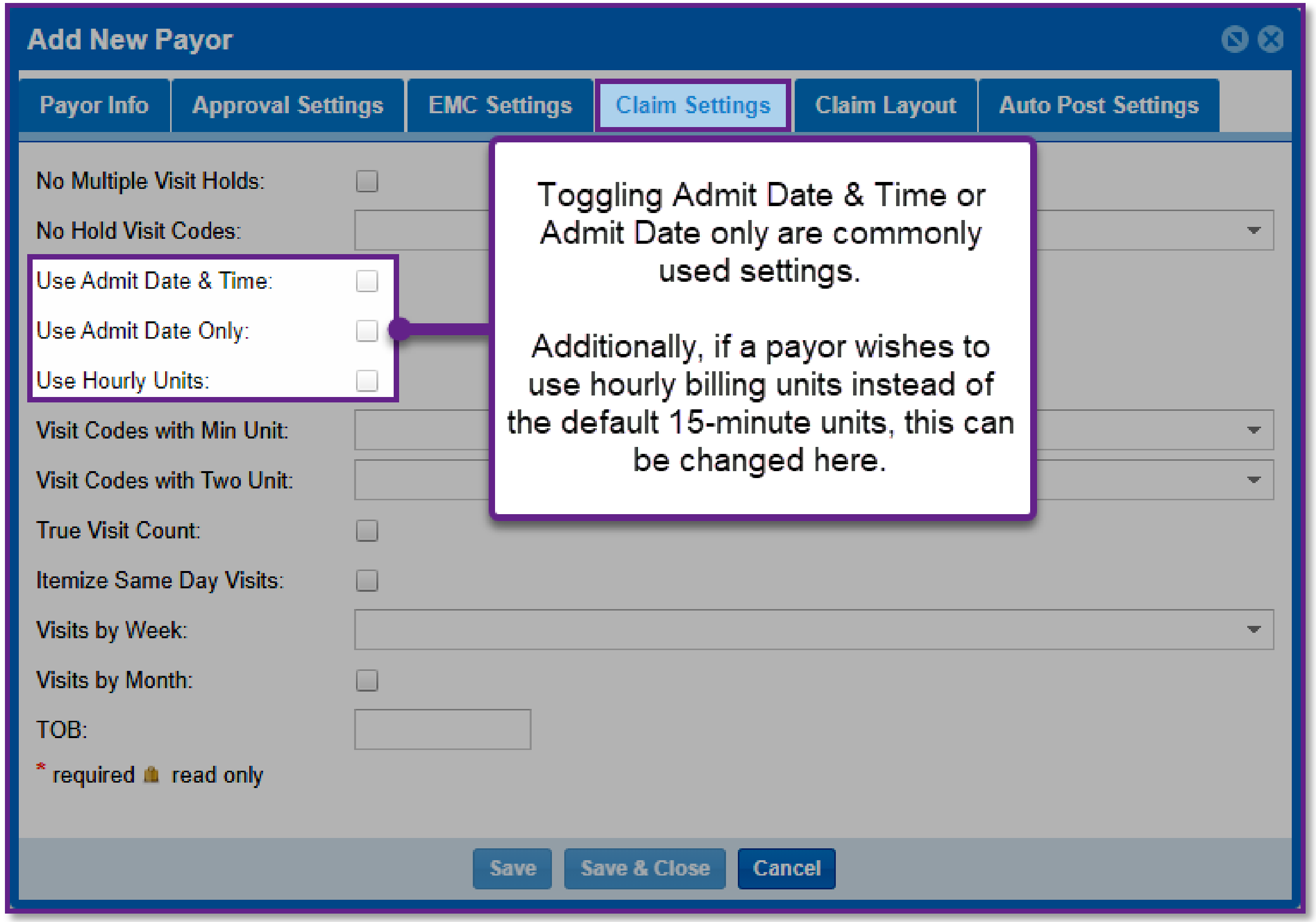
Claim Type will vary by Payor, though Professional is the most typical type used.

AssuriCare

CareWhen Invoices and Claims – Claims Setup

Payor Claim Settings

If applicable to a certain Payor, the Claim Settings tab allows for modifiers to be placed on the Claims that will be generated within CareWhen.



Configuration Note

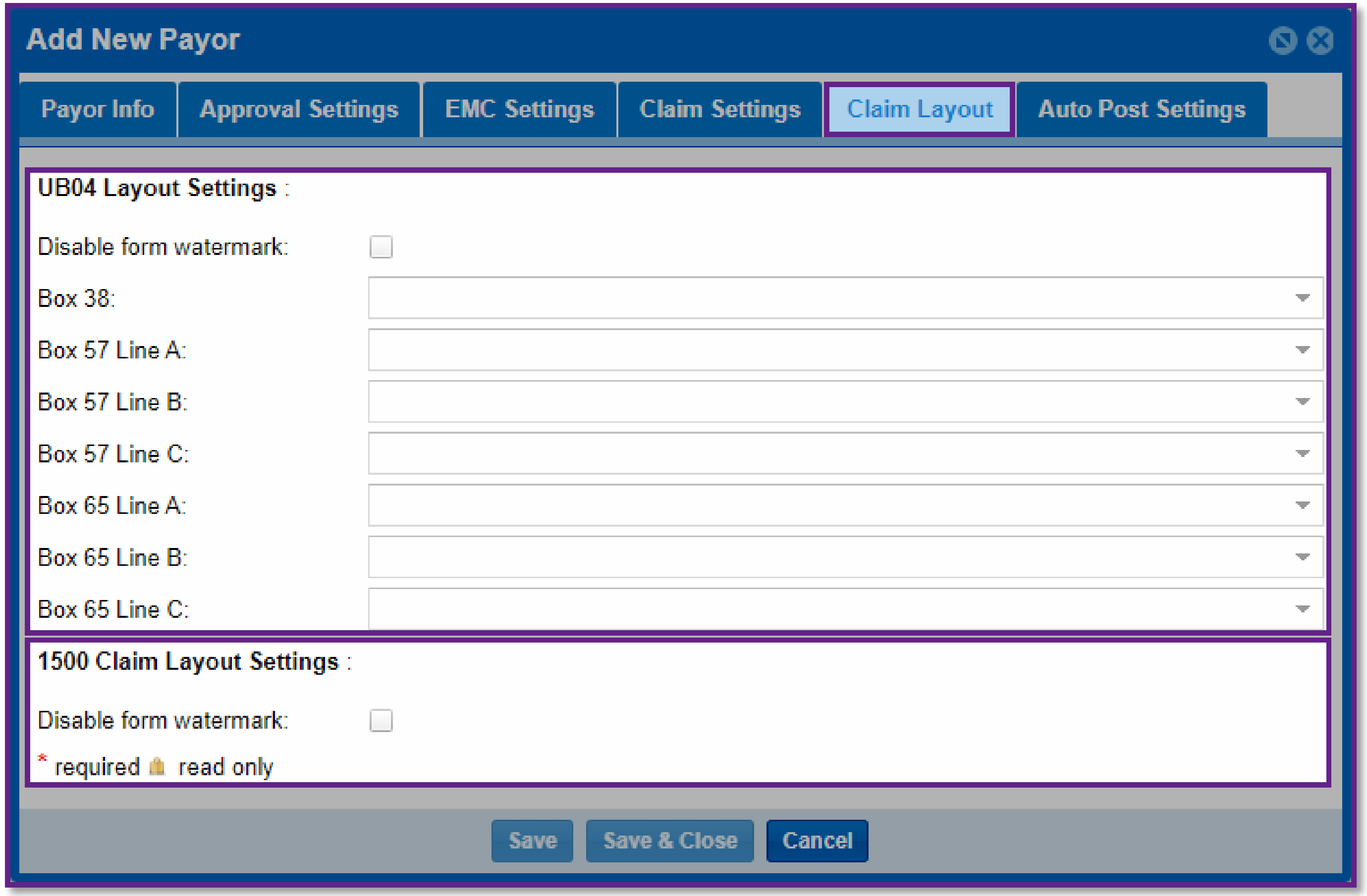
- Modifiers are configured in the Insurance Company Charge Code settings area

CareWhen Invoices and Claims – Claims Setup

Payor Claim Layout

If a Payor will be receiving print Claims, such as the sample UB04 pictured in this training or a 1500 Claim Document, the Claim Layout page may be used to input Payor-specific information into certain fields.

These settings will not apply to a Payor that plans to utilize digital-only Claims.



AssuriCare

CareWhen Invoices and Claims – Claims Setup

Insurance Company EMC Settings

In addition to the Claims settings found in the Payors area, additional claims-related information may be required at the Insurance Company level.

This is done on the EMC Settings tab from the Insurance Company area when adding or editing an Insurance Company.

Note: If an Insurance Company is the same entity as a Payor, redundant EMC settings at this level, such as Sender and Receiver ID, do not need to be repeated if previously entered at the Payor level.