



## 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 Proprietary and Confidential

AssuriCare 100 5th Ave Waltham, MA 02451-8703  Phone    Fax Tax ID # 99-9999999 99212-2868  Charolette Carr 521 N Argonne Rd Spokane Vly, WA 99212-2868  RE: Charolette Carr		<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td colspan="2"> <input type="checkbox"/> Master Card    <input type="checkbox"/> Visa         </td> </tr> <tr> <td style="width: 70%;">Card Number</td> <td>Amount</td> </tr> <tr> <td>Signature</td> <td>Exp. Date</td> </tr> </table> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td>Invoice #1009</td> </tr> <tr> <td>Account #8.N <span style="float: right;">Page 1 of 1</span></td> </tr> <tr> <td>Due Date: 6/5/2020    Invoice Date: 5/21/2020</td> </tr> </table> <div style="text-align: right;">           AssuriCare            100 5th Ave            Waltham, MA 02451-8703         </div> Amount Enclosed: _____	<input type="checkbox"/> Master Card <input type="checkbox"/> Visa		Card Number	Amount	Signature	Exp. Date	Invoice #1009	Account #8.N <span style="float: right;">Page 1 of 1</span>	Due Date: 6/5/2020    Invoice Date: 5/21/2020
<input type="checkbox"/> Master Card <input type="checkbox"/> Visa											
Card Number	Amount										
Signature	Exp. Date										
Invoice #1009											
Account #8.N <span style="float: right;">Page 1 of 1</span>											
Due Date: 6/5/2020    Invoice Date: 5/21/2020											

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	

	TOTAL:	\$200.00
Thank you so much for trusting Assuricare, we appreciate your business!!	TAX TOTAL:	\$0.00
	INVOICE TOTAL:	\$200.00

A sample invoice created in CareWhen

# 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.



1 AssuriCare 100 5th Ave Waltham, MA 02451-8703		2		3a PAT. CNTL # b. MED. REC. # 8		4 TYPE OF BILL 0333	
5 FED. TAX NO. 99-9999999		6 STATEMENT COVERS PERIOD FROM 03/01/2019		7 THROUGH 03/29/2019			
8 PATIENT NAME a Carr, Charolette		9 PATIENT ADDRESS b 521 N Argonne Rd		c WA		d 99212-2868	
10 BIRTHDATE 02/06/35		11 SEX F		12 DATE 3/1/2019		13 ADMISSION 13 HR 14 TYPE 15 SRC 16 DHR	
17 STAT 30		18		19		20	
21		22		23		24	
25		26		27		28	
29 ACCT STATE		30		31		32	
33		34		35		36	
37		38		39		40	
41		42		43		44	
45		46		47		48	
49		50		51		52	
53		54		55		56	
57		58		59		60	
61		62		63		64	
65		66		67		68	
69		70		71		72	
73		74		75		76	
77		78		79		80	
81		82		83		84	
85		86		87		88	
89		90		91		92	
93		94		95		96	
97		98		99		100	

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



The screenshot shows the 'Settings' tab in the CareWhen application, specifically the 'Invoice Settings' section. The interface includes a navigation menu on the left with categories like Skill type, Text Messaging, Agency Logo, Maintenance, Agency Tables, Charge Codes, Payment Codes, Adjustment Codes, Document Categories, GL Codes, Users & Roles, Agency Roles, Agency Users, Doctors, ClockWork/EVV, Export Configurations, Invoicing, Billing Settings, Invoice Settings (highlighted), and Payors. The main content area is titled 'Invoice Settings' and contains several sub-sections: 'Invoice Settings', 'Invoice Email Settings', 'Invoice Layout Settings', and 'Invoice Growth'. The 'Invoice Settings' sub-section is active and contains the following fields: 'Next Invoice Number' (1010), 'Default Due Days' (15), 'Start Date' (03/01/2019), 'Sales Tax Rate', 'Invoice Tax Code', 'Sales Tax Description', 'G/L Revenue Code for Tax', 'G/L Revenue Description', 'Credit Cards Accepted' (Visa, Master Card, Discover, American Express), 'General Comment' (Thank you so much for trusting Assuricare, we appreciate your business), 'Terms Comment', 'Separate mileage on Invoice totals', 'Include Service Tasks', 'Include Service Tasks With Comments', 'Invoice Export Format' (QuickBooks), 'G/L Accounts Receivable Account' (GL A/R), and 'G/L Income Account' (GL Income). Several callouts are present: a red box around the 'Start Date' field with the text 'Set a date to have these invoice settings take effect. This is required.'; a purple box around the 'Sales Tax' fields with the text 'If applicable to your agency, set invoice tax settings for invoices here.'; a red box around the 'Credit Cards Accepted' section with the text 'Set the acceptable credit card types to have listed on the invoices.'; and a purple box around the 'General Comment' field with the text 'Enter comments to have included on agency invoices and toggle the inclusion of service tasks.'

# 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.

**Invoice Settings**

**Invoice Settings** | **Invoice Email Settings** | Invoice Layout Settings | Invoice Group

Reply To:

CC To:

Body:

Include Logo: ☐

\* required read only

The Agency logo is set in the Agency Logo area with Agency Settings.



# 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.



**Invoice Settings**

**Invoice Settings** | **Invoice Email Settings** | **Invoice Layout Settings**

**Invoice Header :**

Agency Phone/Fax: ☒

Agency Return Address: ☒

Due Date: ☒

Invoice Date: ☒

Invoice Number: ☒

Suppress Zone: ☐

Hide Account: ☐

Invoice Total: ☒

Amount Enclosed: ☒

Client Name: ☒

Tax ID: ☒

Logo: ☒

Credit Card Payment: ☒

**Invoice Detail :**

Date: ☒

Description: ☒

Code: ☒

Time: ☒

Quantity: ☒

Rate: ☒

Amount: ☒

Taxable: ☒

**Invoice Footer :**

Invoice Comment: ☒

Show Caregiver Name: ☒

General Comment: ☒

Invoice Terms: ☒

\* required 📄 read only

Sample invoice based on pictured settings

AssuriCare  
100 5th Ave  
Waltham, MA 02451-8703

**AssuriCare**  
The Verification Company

☐ Master Card ☐ Visa

Card Number	Amount
Signature	Exp. Date

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

Phone Fax  
Tax ID # 99-9999999  
99212-2868  
██

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

# 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.*

### Payors Tab

EMC Settings

Claims  
Settings

Claims  
Layouts

### Insurance Companies Tab

EMC Settings



# 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.

The screenshot shows the 'Add New Payor' form with the 'EMC Settings' tab selected. The form contains the following fields:

- Production: Radio buttons for Yes and No (No is selected).
- Claim Type: Dropdown menu set to Professional.
- Receiver ID: Text field containing TESTID1.
- Receiver ID Qualifier: Text field containing ZZ.
- Sender ID: Text field containing 111222333.
- Sender ID Qualifier: Text field containing ZZ.
- Security Password: Text field.
- EMC Program: Text field.
- File Name: Text field.
- Use Company Name: Checkbox (unchecked).
- Facility Provider Id: Text field.
- Claim Starting number: Spin box.
- EVV Plan: Text field.

At the bottom, there are buttons for 'Save', 'Save & Close', and 'Cancel'. A legend indicates that an asterisk (\*) denotes required fields and a padlock icon denotes read-only fields.

**Annotations:**

- A purple box highlights the 'Production' and 'Claim Type' fields with the text: "Claim Type will vary by Payor, though Professional is the most typical type used."
- A white box with a purple border points to the 'Production' field with the text: "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."

# 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

**Add New Payor**

Payor Info | Approval Settings | EMC Settings | **Claim Settings** | Claim Layout | Auto Post Settings

No Multiple Visit Holds: ☐  
No Hold Visit Codes:   
Use Admit Date & Time: ☐  
Use Admit Date Only: ☐  
Use Hourly Units: ☐  
Visit Codes with Min Unit:   
Visit Codes with Two Unit:   
True Visit Count: ☐  
Itemize Same Day Visits: ☐  
Visits by Week:   
Visits by Month: ☐  
TOB:   
\* required 📁 read only

Toggle Admit Date & Time or Admit Date only are commonly used settings.

Additionally, if a payor wishes to use hourly billing units instead of the default 15-minute units, this can be changed here.

Save Save & Close Cancel

# 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.

**Add New Payor**

Payor Info | Approval Settings | EMC Settings | Claim Settings | **Claim Layout** | Auto Post Settings

**UB04 Layout Settings :**

Disable form watermark: ☐

Box 38:

Box 57 Line A:

Box 57 Line B:

Box 57 Line C:

Box 65 Line A:

Box 65 Line B:

Box 65 Line C:

**1500 Claim Layout Settings :**

Disable form watermark: ☐

\* required 🔒 read only

Save Save & Close Cancel

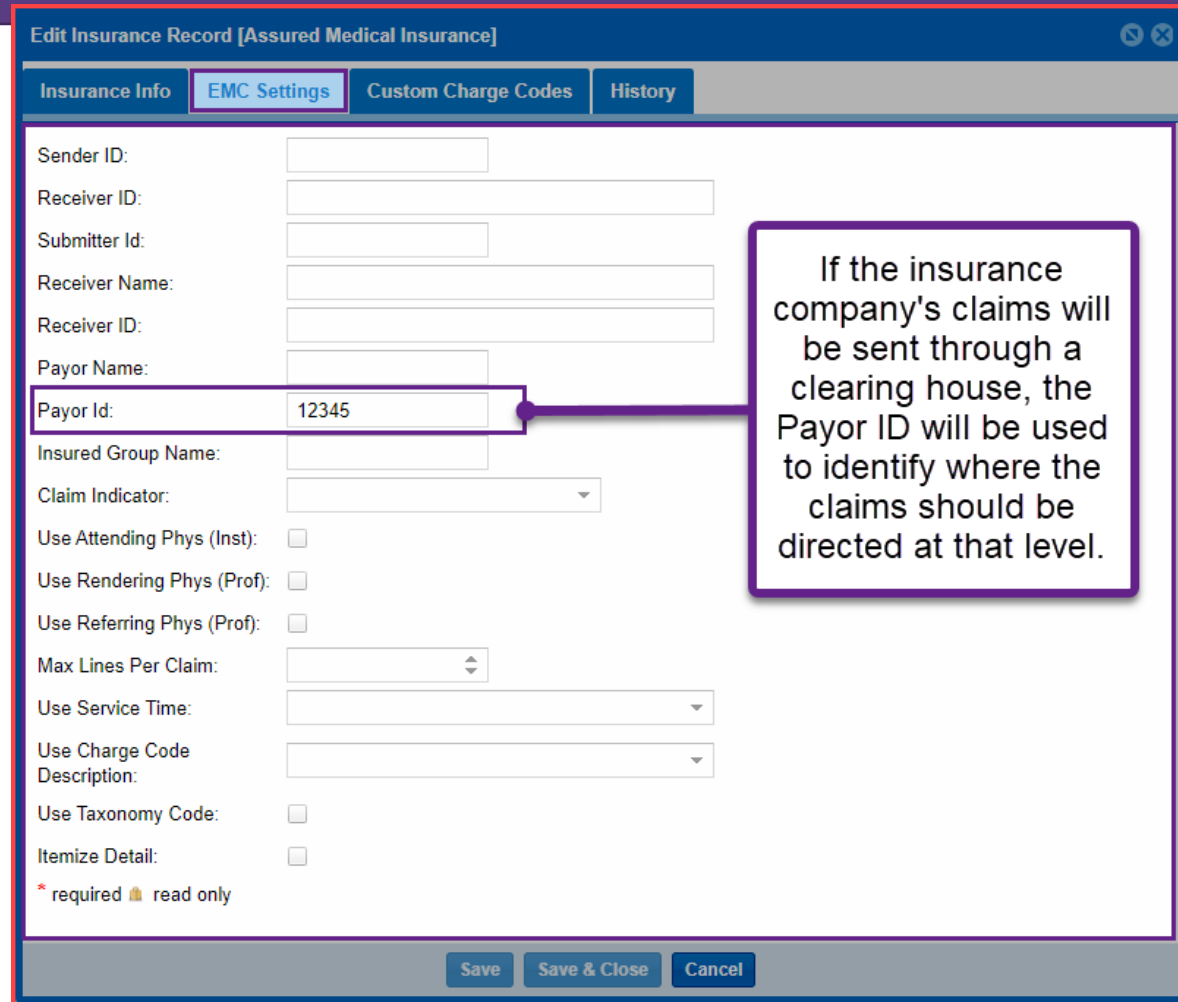
# CareWhen Invoices and Claims – Claims Setup

## 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.*



Edit Insurance Record [Assured Medical Insurance]

Insurance Info **EMC Settings** Custom Charge Codes History

Sender ID:

Receiver ID:

Submitter Id:

Receiver Name:

Receiver ID:

Payor Name:

Payor Id:

Insured Group Name:

Claim Indicator:

Use Attending Phys (Inst): ☐

Use Rendering Phys (Prof): ☐

Use Referring Phys (Prof): ☐


Max Lines Per Claim:

Use Service Time:

Use Charge Code Description:

Use Taxonomy Code: ☐

Itemize Detail: ☐

\* required  read only

Save Save & Close Cancel

If the insurance company's claims will be sent through a clearing house, the Payor ID will be used to identify where the claims should be directed at that level.