



## CareWhen Lite Training

### Payment Tasks



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 Payment Tasks

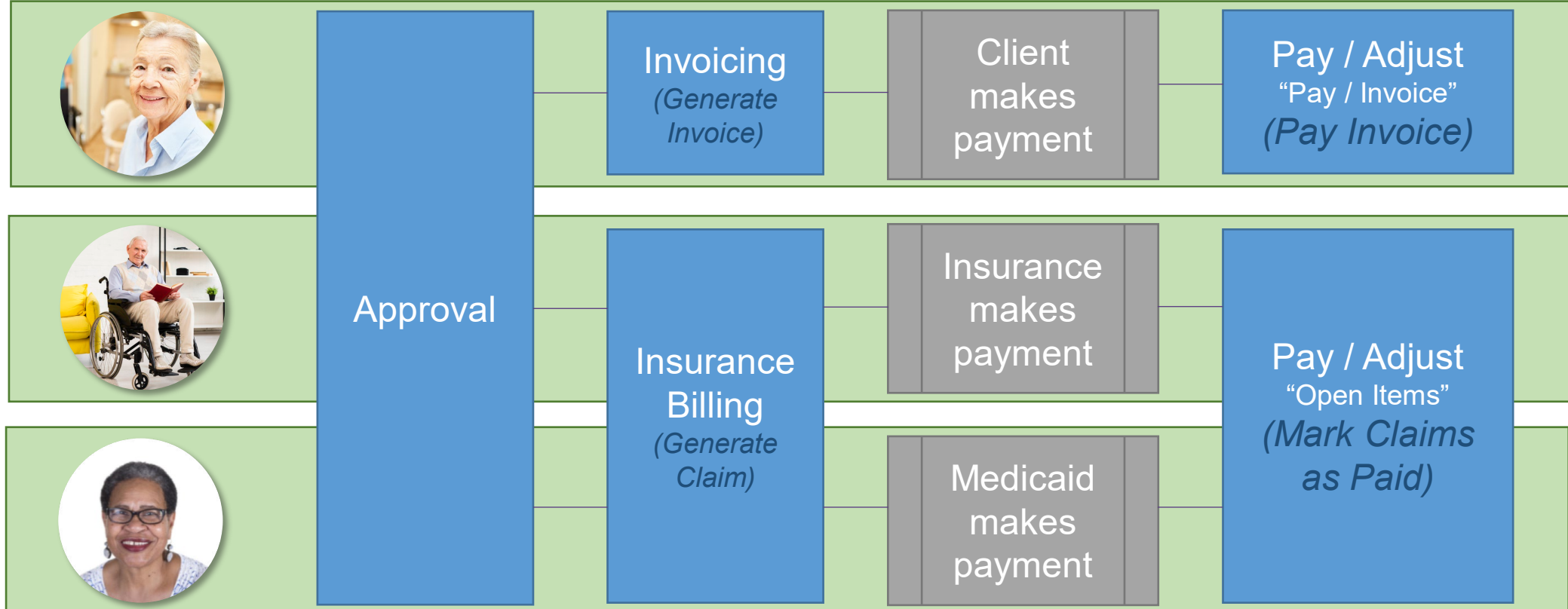
The action of applying payments to claims in CareWhen can be found under the heading “Tasks”.

Tasks				
Approval	Misc Transactions	Pay/Adjust	Invoicing	Insurance Billing
Review and sign-off on completed visits.  <i>Note: Approved visits are then processed as an invoice or claim based on Payor type.</i>	Add in supplementary payments to account for additional charges such as un-accounted for mileage.	Apply manual payments towards outstanding invoices  Add adjustments if needed.	Generate invoices from Approved Visits.  <i>Note: Invoices may be downloaded for printing or emailed directly to clients.</i>	Manage claims that need to be sent to claims-based Payors.  <i>Note: Claims may be downloaded in either print or data formats based on file type.</i>



# CareWhen Payment Process

To illustrate the use of Payment “Tasks”, see below for a map of how certain tabs would be used to process billing for each of our Client examples.



# CareWhen Payment Tasks



## Tasks > Approval



From the Approval tab under Tasks, you may search for completed visits. Use the search bar to locate the visits you wish to approve. To search for Martha's completed visit, we'll search for PVT (Private Pay).

1

2

3

4

5

Flags are used to signal potential issues with completed visits. Mouse-over the flags to display the flag reason.

Confirm Approve

? Approve 1 Visit through 11/19/2020?

Yes No Cancel

After clicking Approve, selected visits will be moved to the Approval queue and will display under Pending Approvals. These will clear automatically once processed.

Approval Date	Client Name	# Visits	View
11/19/2020	Demo, Martha	1	
Remaining :		0	

# CareWhen Invoicing and Claims



## Tasks > Invoicing > Invoicing



The Invoicing example used in this training can only be done using the full version of CareWhen.



Once Martha's visit has been Approved, an Invoice can be generated from the Invoicing tab. This is done by searching for her Approved Visit via the search bar, selecting an Invoice Date, and clicking "Invoice".

Note: For the "Invoice" button to be click-able, the "Invoice Date" cannot be set *before* the date of the completed visit.

The screenshot shows the 'Invoicing' tab in the CareWhen system. The interface includes a top navigation bar with tabs like 'Send Reminders', 'Exports', 'Approval', 'Misc Transactions', 'Pay', 'Invoicing' (highlighted with a red circle 1), 'Insurance Billing', and 'Time'. Below this is a sub-navigation bar with 'Invoicing' (highlighted with a red circle 2), 'Invoices', and 'Export Invoices'. The main area contains a search bar with filters: 'All Clients' (highlighted with a red circle 3), 'PVT', and 'All Client Types'. There are also 'Invoice Through' and 'Invoice Date' fields, both set to 11/19/2020 (highlighted with a red circle 5). A red circle 4 highlights the 'Client' column in the table. A red circle 6 highlights the 'Invoice' button with a green checkmark. The table lists one client, 'Demo, Martha', with a visit on 11/18/2020 for a PVT service, totaling \$10.00. Below the table is a 'Visit Detail for: Demo, Martha : PVT' section showing the service details.

Client	From Date	To Date	Payor	Client Type	Amount Totals	Tax	Total
✓ Demo, Martha	11/18/2020	11/18/2020	PVT		\$10.00	\$0.00	\$10.00
Totals (1) :					\$10.00	\$0.00	\$10.00

Service Date	Caregiver	Code	Description	Payor	Qty	Amount	Tax	Pymt/Adj	Balance
11/18/2020	Cheerie, Cheryl [CNA]	36010	Homemak...	PVT	1.00	\$10.00	\$0.00		\$10.00
Totals:									

When you select a Client, Visit Details will populate with a summary of all Approved Visits that will be included on the Invoice.

# CareWhen Invoicing and Claims

## Tasks > Invoicing > Client Invoices



The Invoicing example used in this training can only be done using the full version of CareWhen.



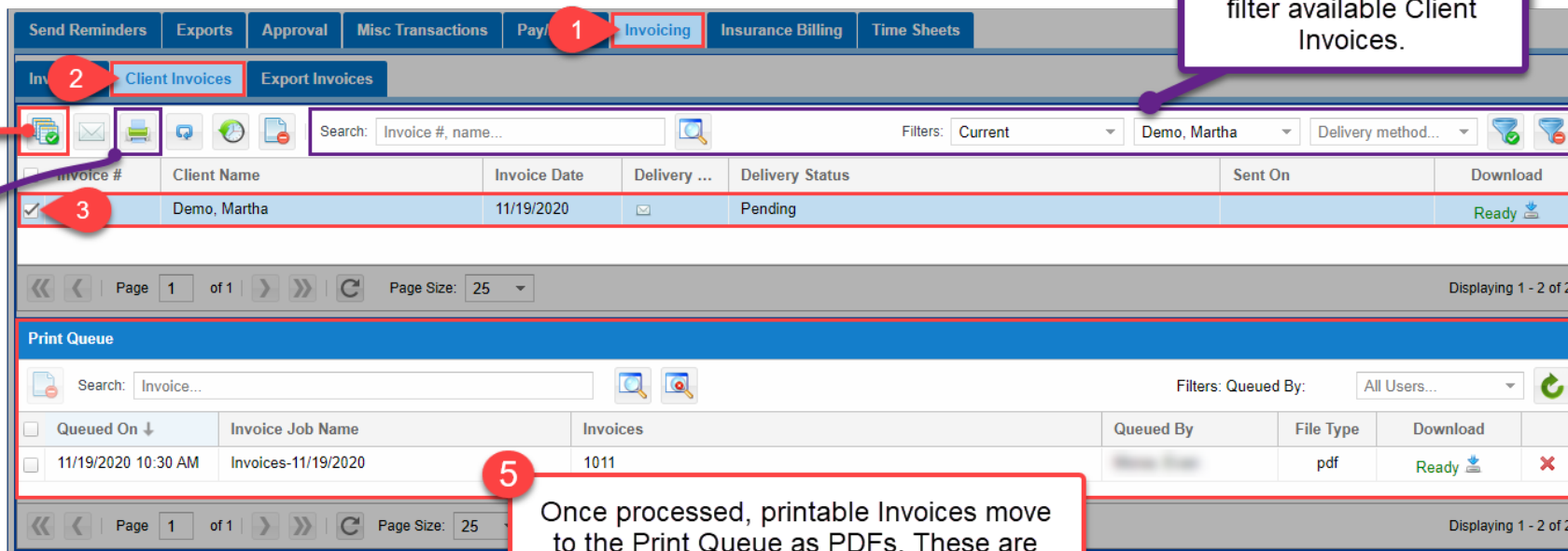
With the Invoice generated, navigate to the Client Invoices tab. Martha is set up to receive print Invoices.

4 Use the Process Button to process all selected invoices via the Client's preferred delivery format.

This will either generate a printable invoice, or email the invoice directly to the Client.

If multiple invoices exist for a single Client, use the Combine button to create a print invoice combining all selected invoices.

Use the search bar to filter available Client Invoices.



The screenshot shows the 'Invoicing' tab in the CareWhen software. The 'Client Invoices' sub-tab is active. A table lists invoices for 'Demo, Martha'. The first row is selected. Below the table is a 'Print Queue' section showing a PDF of the invoice ready for download. Numbered callouts indicate the following steps:

1. Click the 'Invoicing' tab.
2. Click the 'Client Invoices' sub-tab.
3. Select the invoice row.
4. Click the 'Process' button (represented by a green checkmark icon).
5. Click the 'Download' button for the invoice in the Print Queue.

Once processed, printable Invoices move to the Print Queue as PDFs. These are then downloaded, printed, and sent to the Client / Responsible Party.

# CareWhen Invoicing and Claims

## Tasks > Pay / Adjust > Pay Invoice

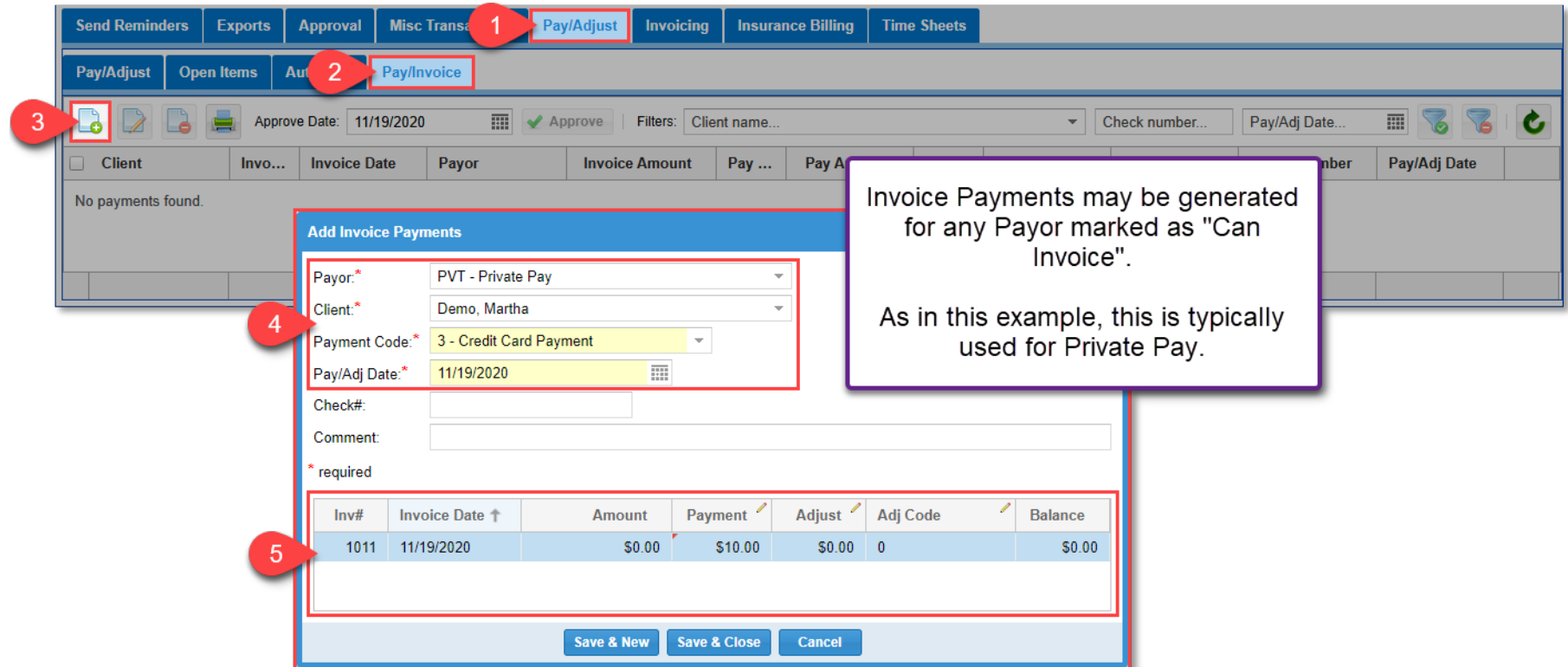


The Invoicing example used in this training can only be done using the full version of CareWhen.



After receiving her invoice, Martha sent the Agency a credit card payment of \$10 to pay her invoice. This is entered under the Pay / Invoice tab within Pay / Adjust.

Add a new payment, select the applicable Payor and Client. This will populate the payment box with all outstanding Invoices for the Client. Enter in a payment amount in the Payment column, then click Save.



**1** Pay/Adjust

**2** Pay/Invoice

**3** Add new payment icon

**4** Add Invoice Payments form fields:

- Payor: PVT - Private Pay
- Client: Demo, Martha
- Payment Code: 3 - Credit Card Payment
- Pay/Adj Date: 11/19/2020

**5** Payment table:

Inv#	Invoice Date ↑	Amount	Payment	Adjust	Adj Code	Balance
1011	11/19/2020	\$0.00	\$10.00	\$0.00	0	\$0.00

Buttons: Save & New, Save & Close, Cancel

Invoice Payments may be generated for any Payor marked as "Can Invoice".

As in this example, this is typically used for Private Pay.



# CareWhen Invoicing and Claims



Tasks > Pay / Adjust > Pay Invoice continue



The Invoicing example used in this training can only be done using the full version of CareWhen.



Once invoice payments have been added to the Pay / Invoice area, they must be approved before being posted to the Client's account. When a Client payment has successfully cleared, check the box next to the payment, select an Approve Date, and click the Approve button.

## Configuration Note

- The Approve Date cannot be set in the future **and** must come on or after the Pay / Adjust date set in the payment.

The screenshot shows the 'Pay/Adjust' section of the software. The 'Pay/Adjust' tab is selected, and the 'Pay/Invoice' sub-tab is active. A table lists payments, with the first row highlighted. The 'Approve Date' field is set to 11/20/2020, and the 'Approve' button is visible. Red callouts 1 through 5 indicate the sequence of steps for approving a payment.

Client	Invoice...	Invoice Date	Pa...	Invoice Amount	P...	Pay Amount	A...	Adj Amount	Balance Due	Check Number	Pay/Adj Date
<input checked="" type="checkbox"/> Demo, Mart...	1011	11/19/2020	PVT	\$10.00	3...	\$10.00		\$0.00	\$0.00		11/19/2020



# CareWhen Invoicing and Claims

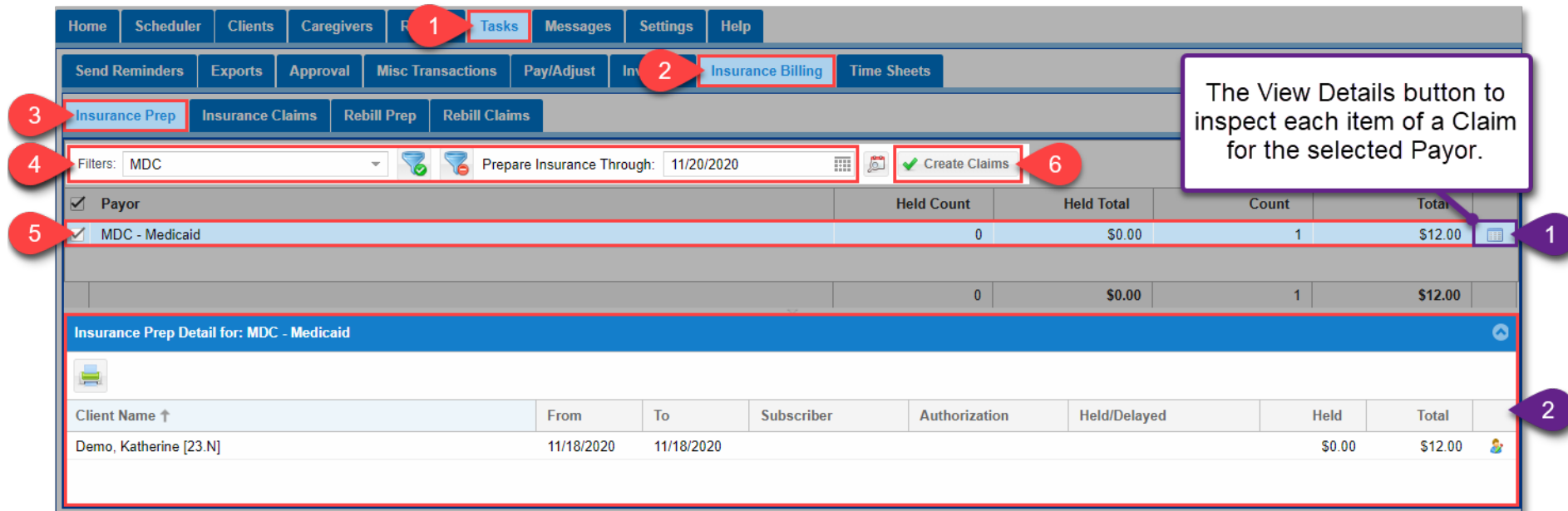
## Tasks > Insurance Billing > Insurance Prep



Charlie and Katherine's Payors both utilize Claims. These are managed from the Insurance Billing tab and, unlike Invoices, are managed in groups based on the Payor rather than the Client.

Filter available potential Claims via Payor and select a "Prepare Insurance Through" date. Multiple Payor filters can be selected for faster searching.

Select the Payor you wish to create a Claim for and select "Create Claims".



The screenshot shows the 'Insurance Prep' interface with the following elements:

- 1**: 'Tasks' tab in the top navigation bar.
- 2**: 'Insurance Billing' tab in the sub-navigation bar.
- 3**: 'Insurance Prep' sub-tab.
- 4**: 'Filters: MDC' dropdown menu.
- 5**: 'Payor' filter section with 'MDC - Medicaid' selected.
- 6**: 'Create Claims' button.

A callout box states: "The View Details button to inspect each item of a Claim for the selected Payor." pointing to the 'View Details' icon (1).

Payor	Held Count	Held Total	Count	Total
MDC - Medicaid	0	\$0.00	1	\$12.00
	0	\$0.00	1	\$12.00

**Insurance Prep Detail for: MDC - Medicaid**

Client Name ↑	From	To	Subscriber	Authorization	Held/Delayed	Held	Total
Demo, Katherine [23.N]	11/18/2020	11/18/2020				\$0.00	\$12.00

**2**: Points to the 'View Details' icon (person icon) in the bottom right corner of the detail table.

# CareWhen Invoicing and Claims



## Tasks > Insurance Billing > Insurance Claims



When a Claim has been prepared, it moves to the Insurance Claims tab. From here, the Claim may be rendered as a file type based on the billing needs of the Payor (such as UB04 print claim or an EMC electronic claim).

A Claim's status will update as the Claim is worked on:

"Pending" indicates a Claim that hasn't been exported to a file.

"Processing" indicates a Claim that is actively being turned into a file. This can take a few minutes to complete.

Once a Claim has been converted into a file, the Status will turn **green** and display who made the file and when.

The screenshot shows the 'Insurance Billing' tab selected in the top navigation bar (callout 1). Below it, the 'Insurance Claims' sub-tab is active (callout 2). A dropdown menu is set to 'UB04' (callout 4), and a 'Create File' button is visible (callout 5). A table lists two claims, both with a status of 'Pending' (callout 3):

	Created On ↑	Claim Date	Payor Name	Claim Type	Total	Status
<input checked="" type="checkbox"/>	11/20/2020	11/20/2020	MDC - Medicaid	Professional	\$12.00	Pending
<input checked="" type="checkbox"/>	11/20/2020	11/20/2020	AMI - Assured Medical Insurance	Professional	\$14.00	Pending

At the bottom, there is a 'Download Queue' section with a search bar and a 'Claim Acknowledgment' button.

# CareWhen Invoicing and Claims



## Tasks > Insurance Billing > Insurance Claims continued



Once a Claim has been converted to a file, it will be placed in the Download Queue. From here, the Claims files may be downloaded and sent to the Payor. For Insurance and Medicaid Payors, this is generally done via an upload to a Claims portal.

Queued On ↓	Payor	Claim Info / Filename	File Type	Queued By	Download
11/20/2020 12:47 PM	MDC	MDC Claim X12 - 11_20_2020	clm	John Doe	Ready
11/20/2020 12:47 PM	AMI	AMI Claim UB04 - 11_20_2020	pdf	John Doe	Ready

Claim file as Text

```
"ISA*00" "00" "01"AV09311993 "ZZ"030240928 "201120"1247"
GS*HC*AV09311993*030240928*20201120*1247*1*X*005010X222A1~
ST*837*0001*005010X222A1~
BHT*0019*00~20112012470~20201120*1247*CH~
NM1*41*2*ASSURICARE*****46*AV09311993~
PER1C*BILLER NAME*TE*FX~
NM1*40*2*MEDICAID*****46*030240928~
HL*1*20*1~
PRV*BIPXC*555E0000Z~
NM1*85*2*ASSURICARE*****XX*9876543210~
N3*100 5TH AVE~
N4*WALTHAM*MA*024518703~
REF*E199999999~
HL*2*1*22*0~
SBR*P*18*MEDICAID*****MC~
NM1*1L*1*DEMO*KATHERINE*****MI~
N3*103 5TH AVE~
N4*WALTHAM*MA*024518703~
DMG*D8*19380509F~
NM1*PR*2*MEDICAID*****PI*12345~
CLM*23*12***2.B*1*Y*AY*Y~
DTP*435*D8*20201103~
HI*ABK~
LX*1~
SV1*HC.S5125*12*UN*4***1~
DTP*472*D8*20201118~
SE*25*0001~
GE*11~
IEA*1*000010006~
```

Close

For these examples, Katherine's Medicaid Claim has been turned into an EMC file, and Charlie's Insurance Claim has been turned into a UB04.

Sample of an EMC file displayed as text

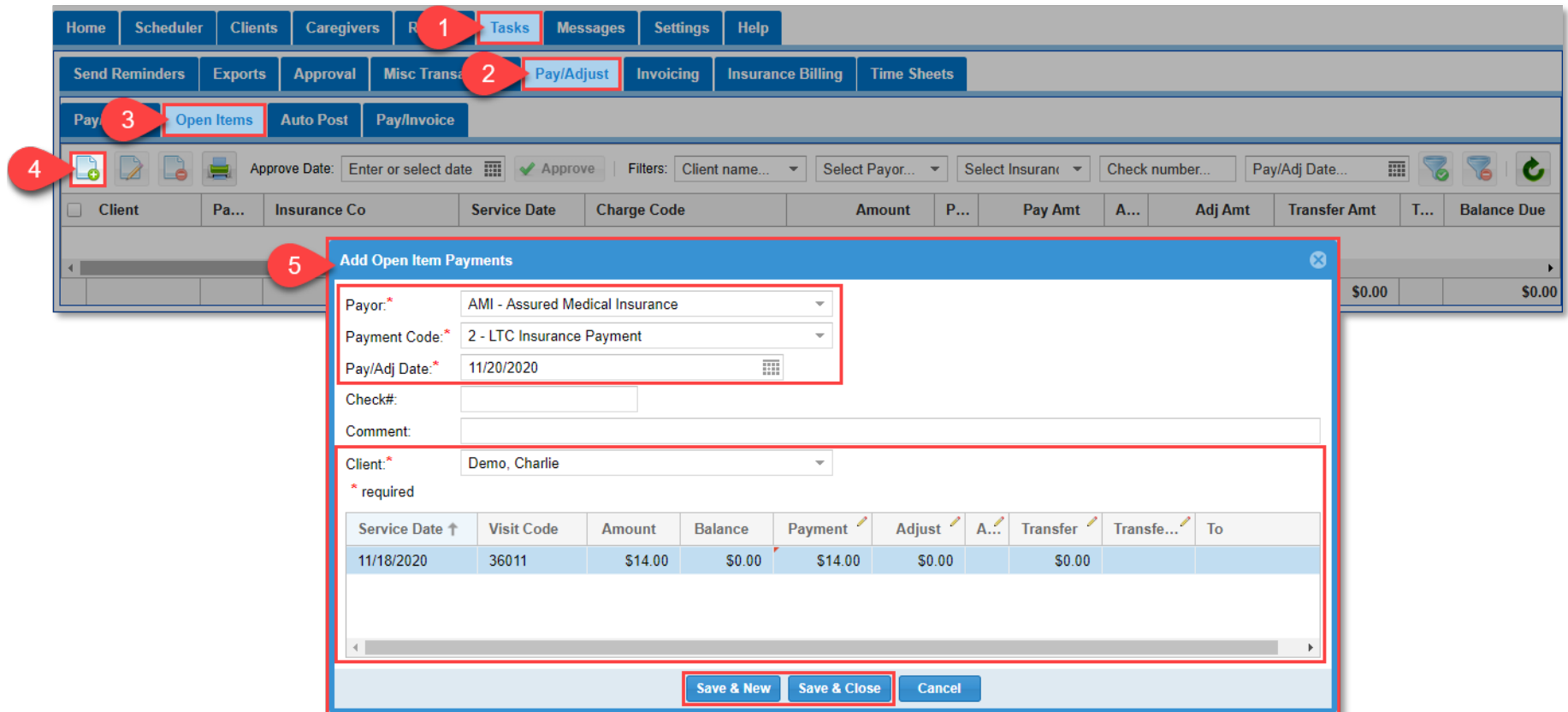
# CareWhen Invoicing and Claims

## Tasks > Pay / Adjust > Open Items



Post Insurance or Medicaid-based payments to a Client's account from the Open Items tab under Pay / Adjust.

From this tab, select the Add button to bring up the payment window. Input a Payor, Payor Code, Pay Date, and Client. Selecting a Client will display the open Claims associated with the Client's account. Received payments may be added here.



The screenshot shows the AssuriCare software interface. The top navigation bar includes tabs: Home, Scheduler, Clients, Caregivers, **Tasks** (highlighted with a red circle 1), Messages, Settings, and Help. Below this is a sub-navigation bar with buttons: Send Reminders, Exports, Approval, Misc Trans, **Pay/Adjust** (highlighted with a red circle 2), Invoicing, Insurance Billing, and Time Sheets. Under the Pay/Adjust tab, there are sub-tabs: Pay, **Open Items** (highlighted with a red circle 3), Auto Post, and Pay/Invoice. In the Open Items sub-tab, there is an 'Add' button (plus icon) highlighted with a red circle 4. A red circle 5 points to the 'Add Open Item Payments' dialog box that appears. The dialog box contains the following fields and data:

- Payor\*: AMI - Assured Medical Insurance
- Payment Code\*: 2 - LTC Insurance Payment
- Pay/Adj Date\*: 11/20/2020
- Check#:
- Comment:
- Client\*: Demo, Charlie

\* required

Service Date ↑	Visit Code	Amount	Balance	Payment	Adjust	A...	Transfer	Transfe...	To
11/18/2020	36011	\$14.00	\$0.00	\$14.00	\$0.00		\$0.00		

Buttons at the bottom: Save & New, Save & Close, Cancel.

# CareWhen Invoicing and Claims



Tasks > Pay / Adjust > Open Items continued



When the Insurance and Medicaid payments have cleared for Charlie and Katherine's bills, "Approve" the payments from the Open Items tab. Select the items from the table, set an Approve Date, and click Approve.

## Configuration Note

- The Approve Date cannot be set in the future **and** must come on or after the Pay / Adjust date set in the payment.

	Client	Pa...	Insurance Co	Service Date	Charge Code	Amount	P...	Pay Amt	A...	Adj Amt	Transfer Amt	T...	Balance Due
<input checked="" type="checkbox"/>	Demo, Cha...	AMI	Assured Medical Insurance	11/18/2020	36011 Personal Care Hou...	\$14.00	2...	\$14.00		\$0.00	\$0.00		\$0.00
<input checked="" type="checkbox"/>	Demo, Kath...	MDC	Medicaid	11/18/2020	36011 Personal Care Hou...	\$12.00	1...	\$12.00		\$0.00	\$0.00		\$0.00

Confirm Approve

? Approve 2 payments through 11/20/2020 ?

Yes No Cancel

