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”.

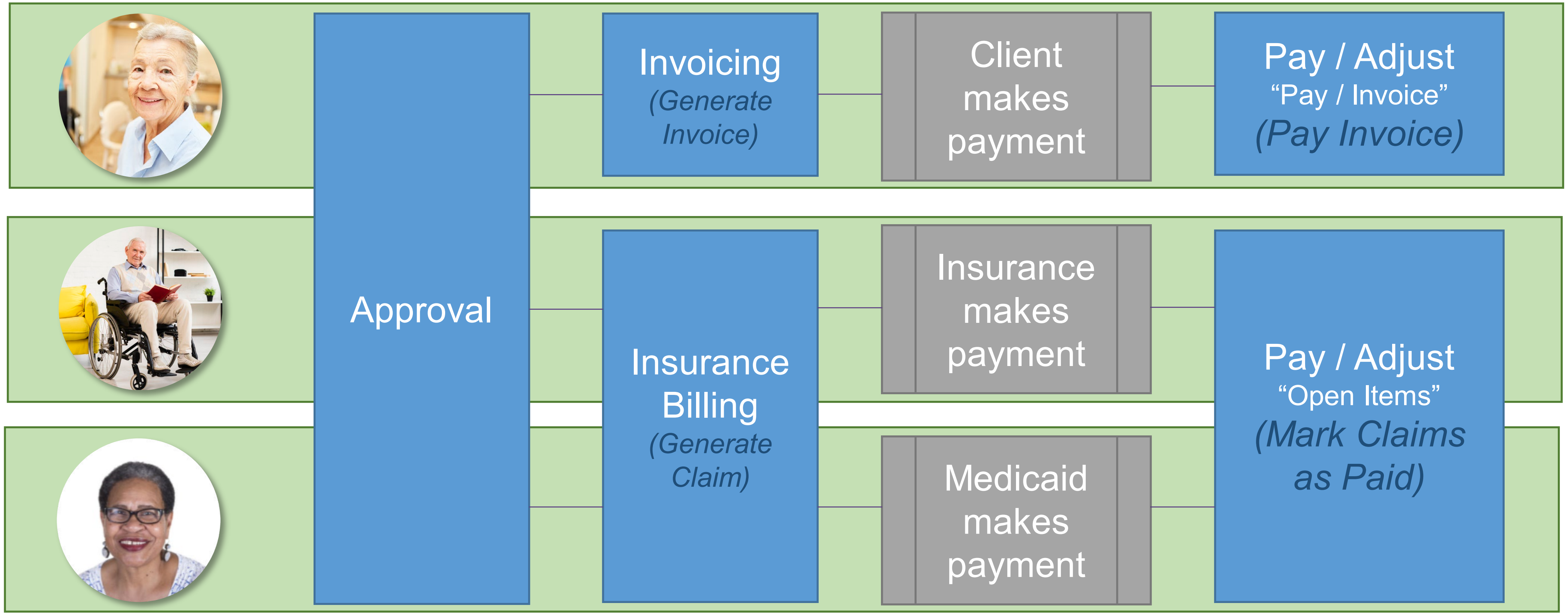
Tasks

Approval	Misc Transactions	Pay/Adjust	Invoicing	Insurance Billing
Review and sign-off on completed visits. *Note: Approved visits are then processed as an invoice or claim based on Payor type.*	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. *Note: Invoices may be downloaded for printing or emailed directly to clients.*	Manage claims that need to be sent to claims-based Payors. *Note: Claims may be downloaded in either print or data formats based on file type.*

The Pay / Adjust and Invoicing tabs, along with their functionality, are not available in CareWhen Lite.

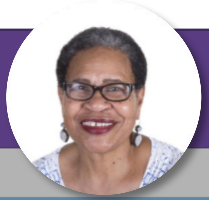
CareWhen Payment Process

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.

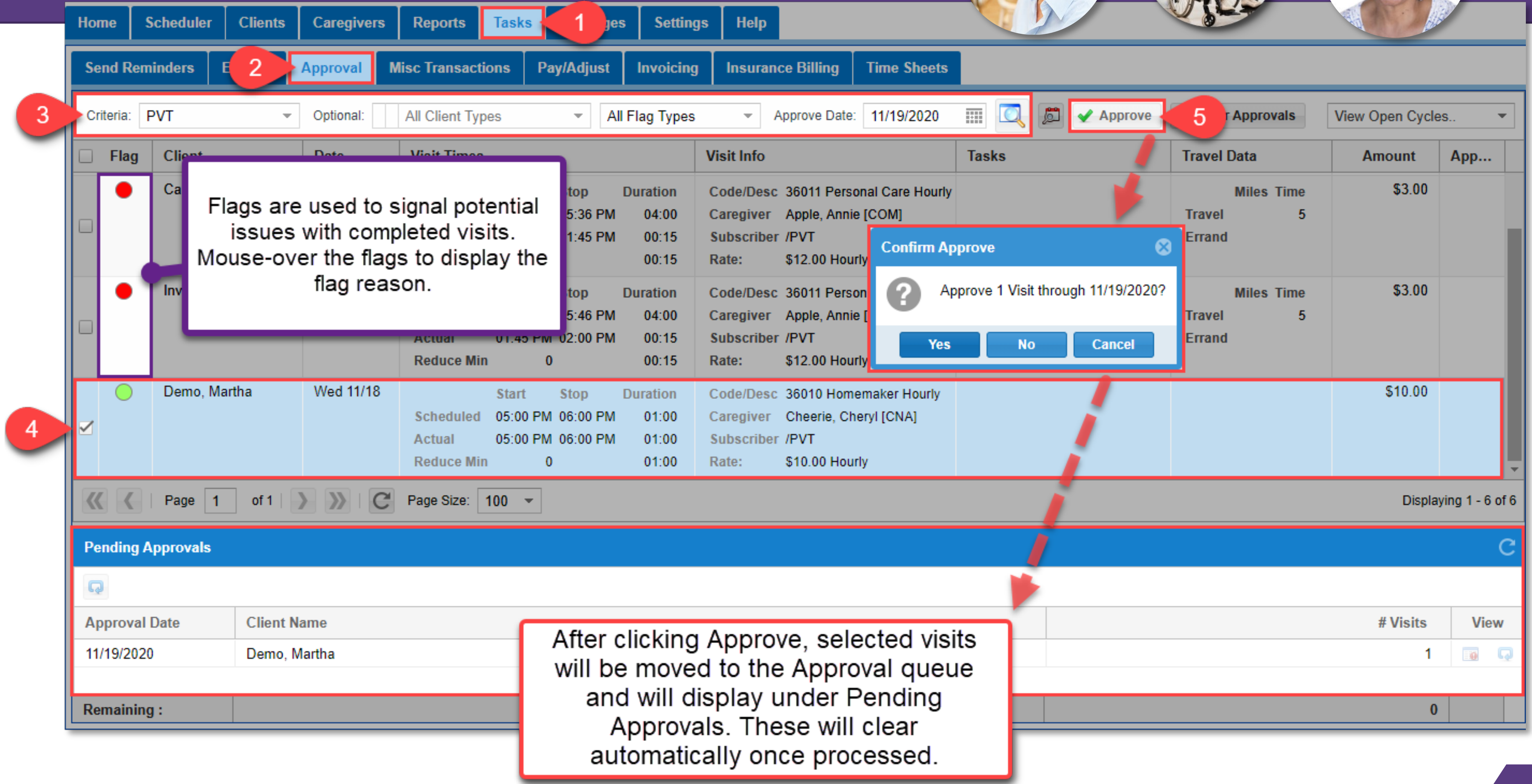


CareWhen Payment Tasks

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).



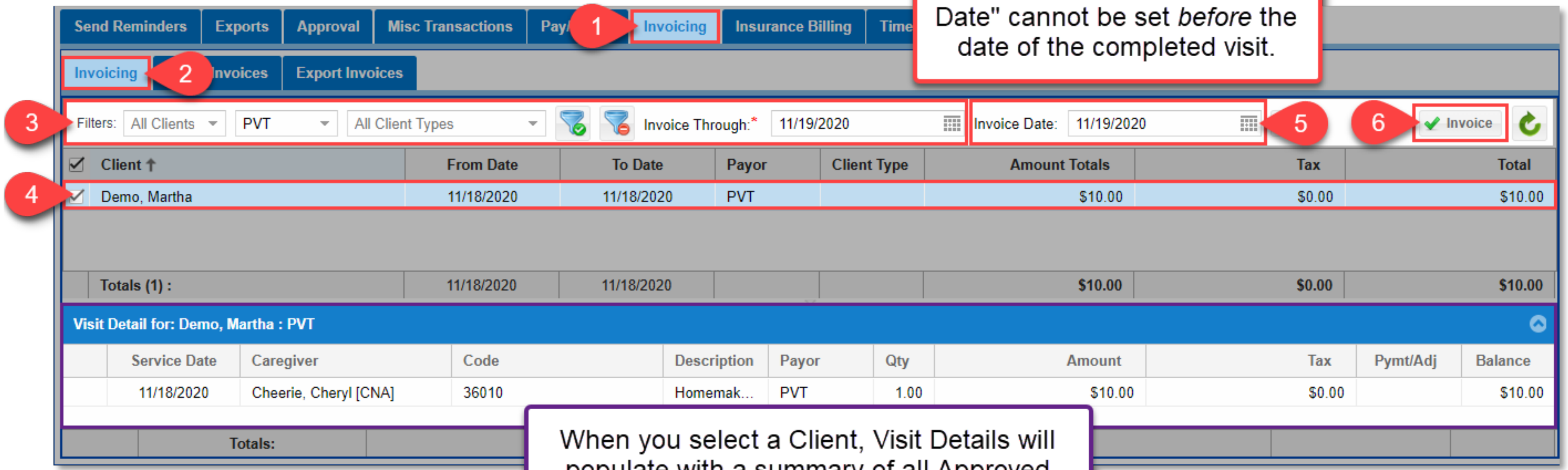
CareWhen Invoicing and Claims

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.



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.

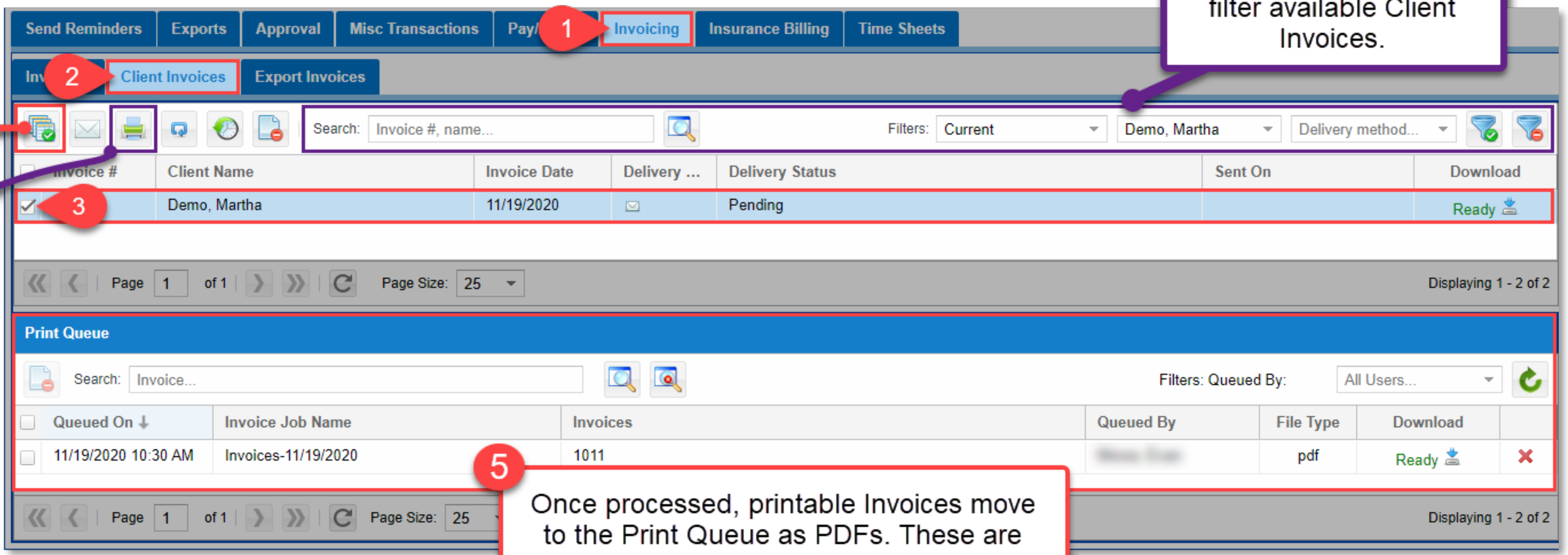
With the Invoice generated, navigate to the Client Invoices tab. Martha is set up to receive print Invoices.

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.



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

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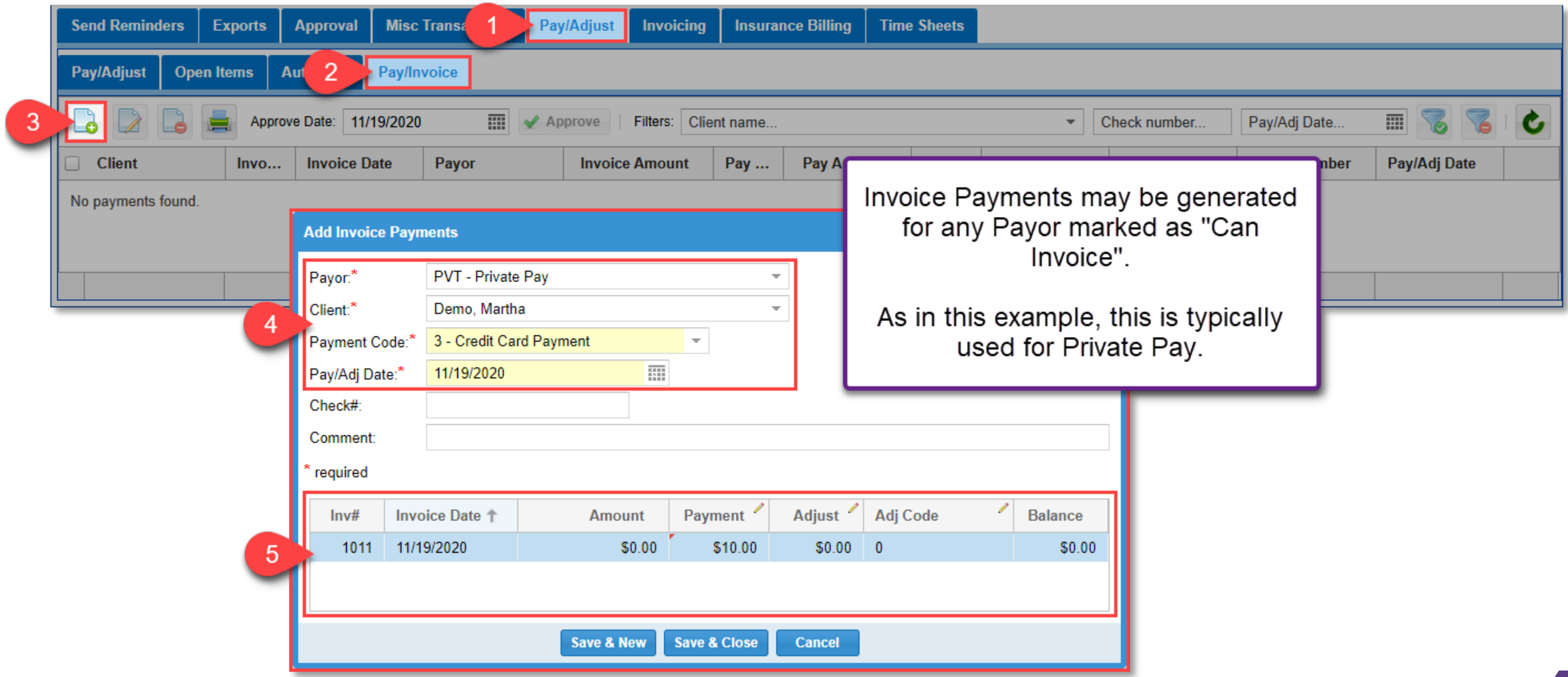
CareWhen Invoicing and Claims

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.



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CareWhen Invoicing and Claims

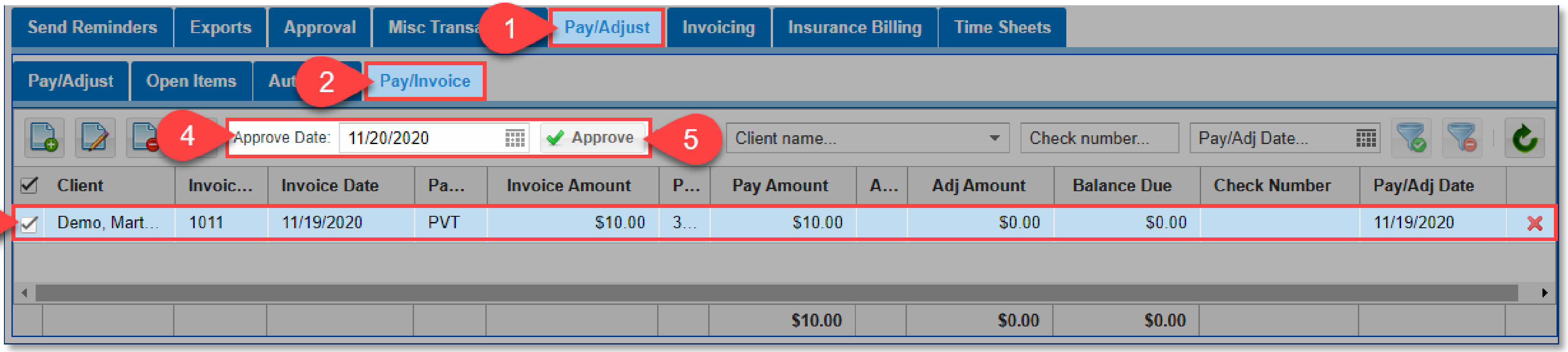
Tasks > Pay / Adjust > Pay Invoice continu

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.



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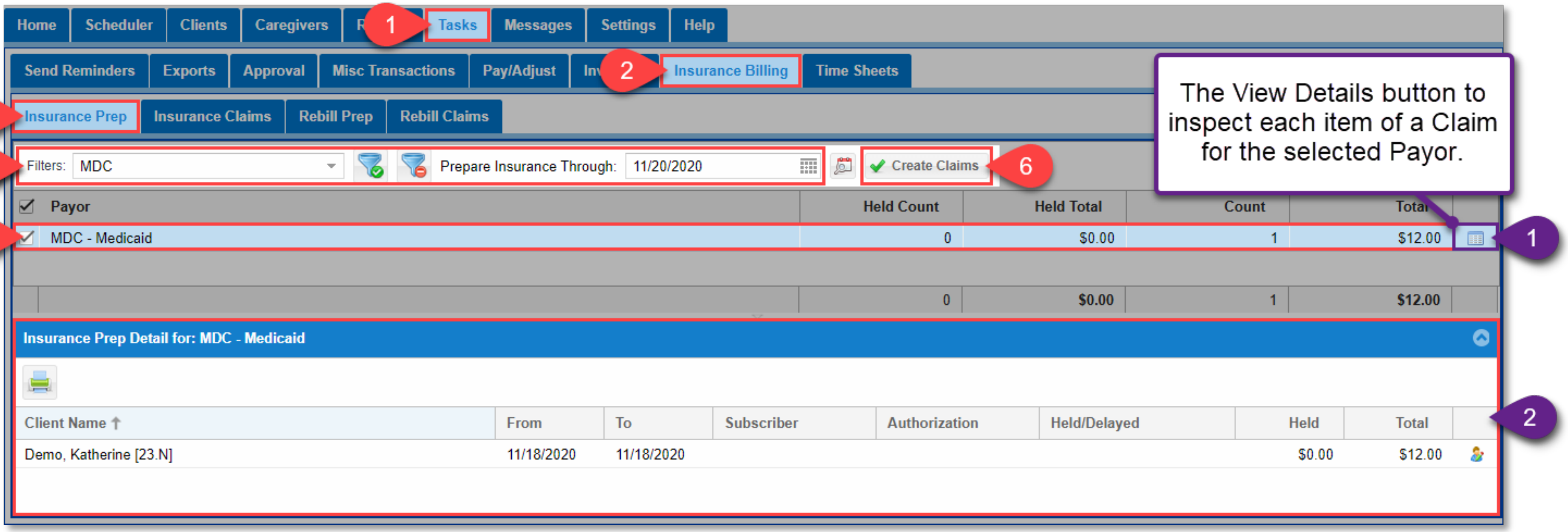
CareWhen Invoicing and Claims

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”.



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CareWhen Invoicing and Claims

Tasks > Insurance Billing > Insurance Claims

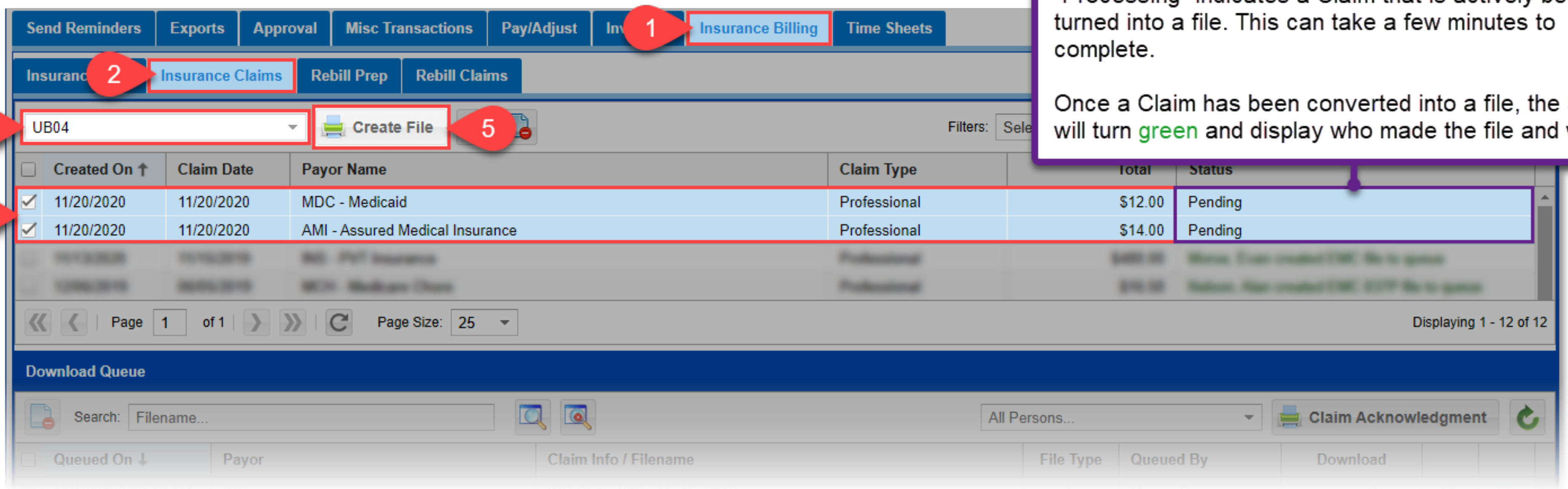
When a Claim has been prepared, it moves to the Insurance Claims tab. From here, the Claim may be rendered as a file type based on the billing needs of the Payor (such as UB04 print claim or an EMC electronic claim).

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.

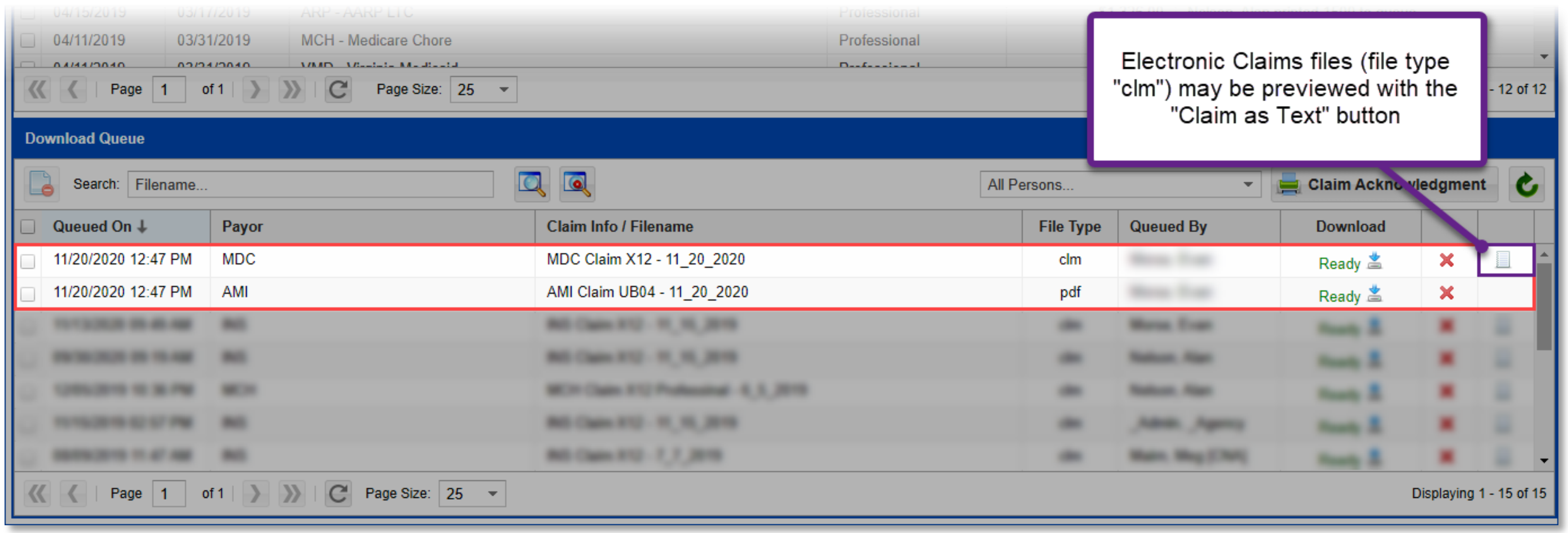
Once a Claim has been converted into a file, the Status will turn green and display who made the file and when.



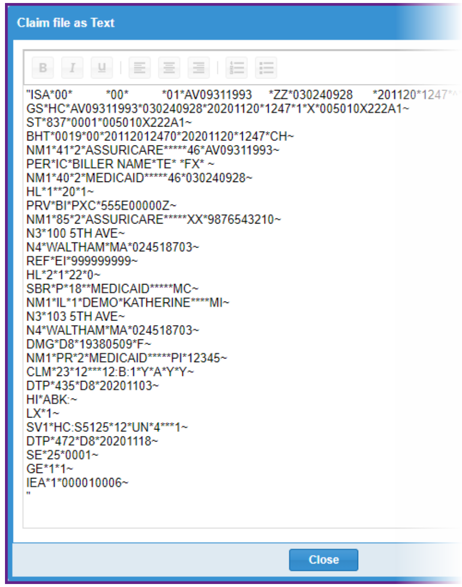
CareWhen Invoicing and Claims

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.



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

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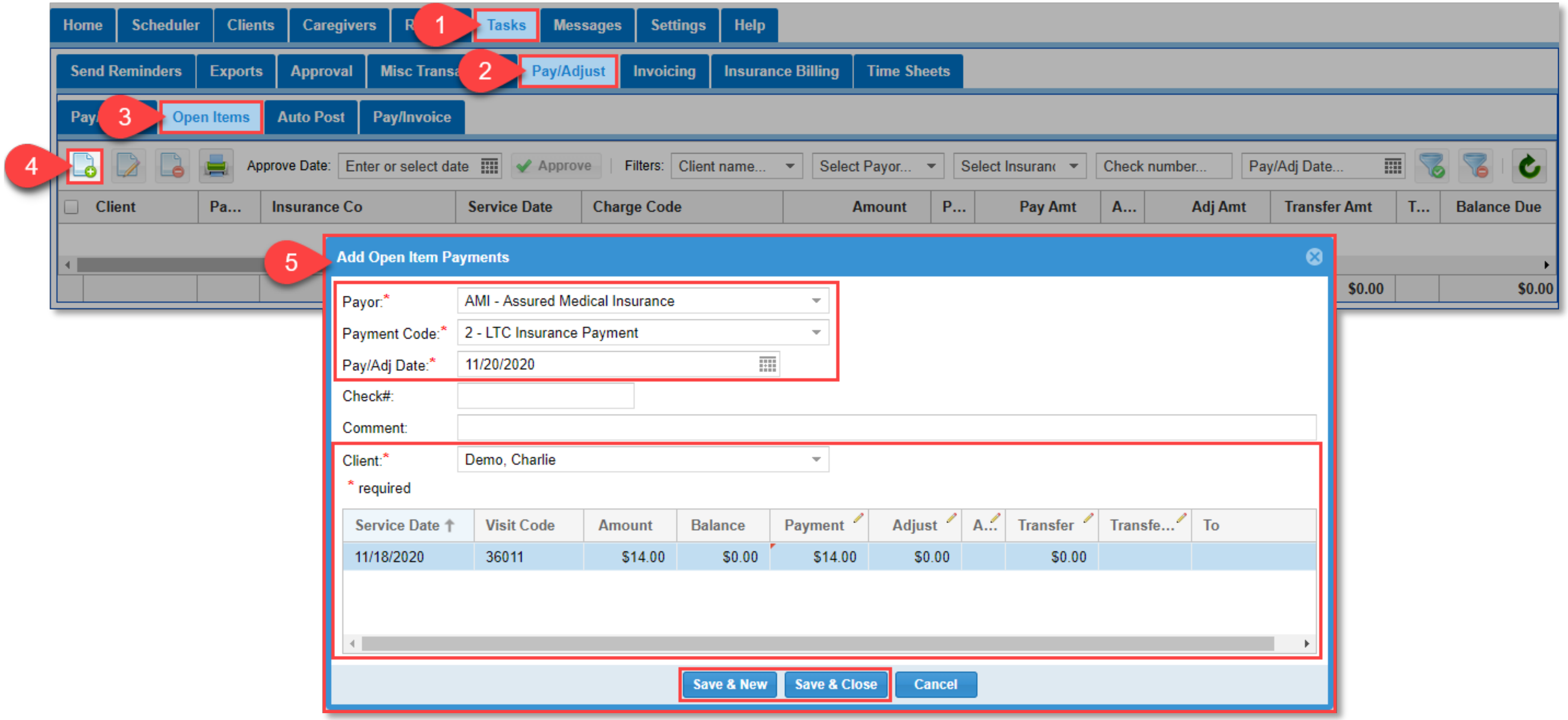
CareWhen Invoicing and Claims

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.



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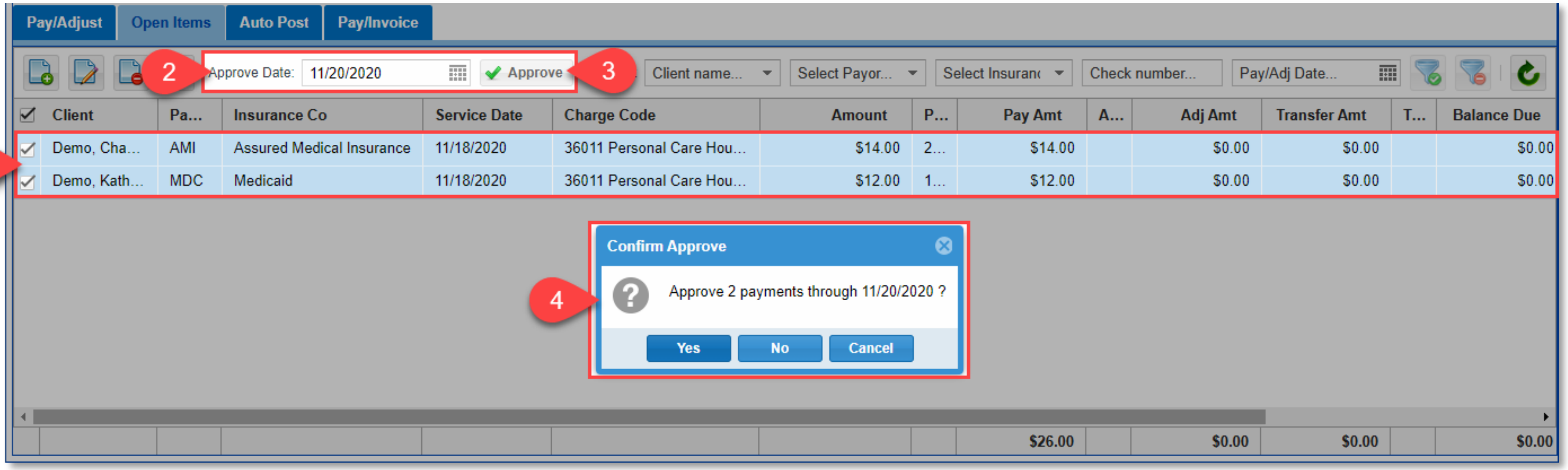
CareWhen Invoicing and Claims

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.



CareWhen Invoicing and Claims

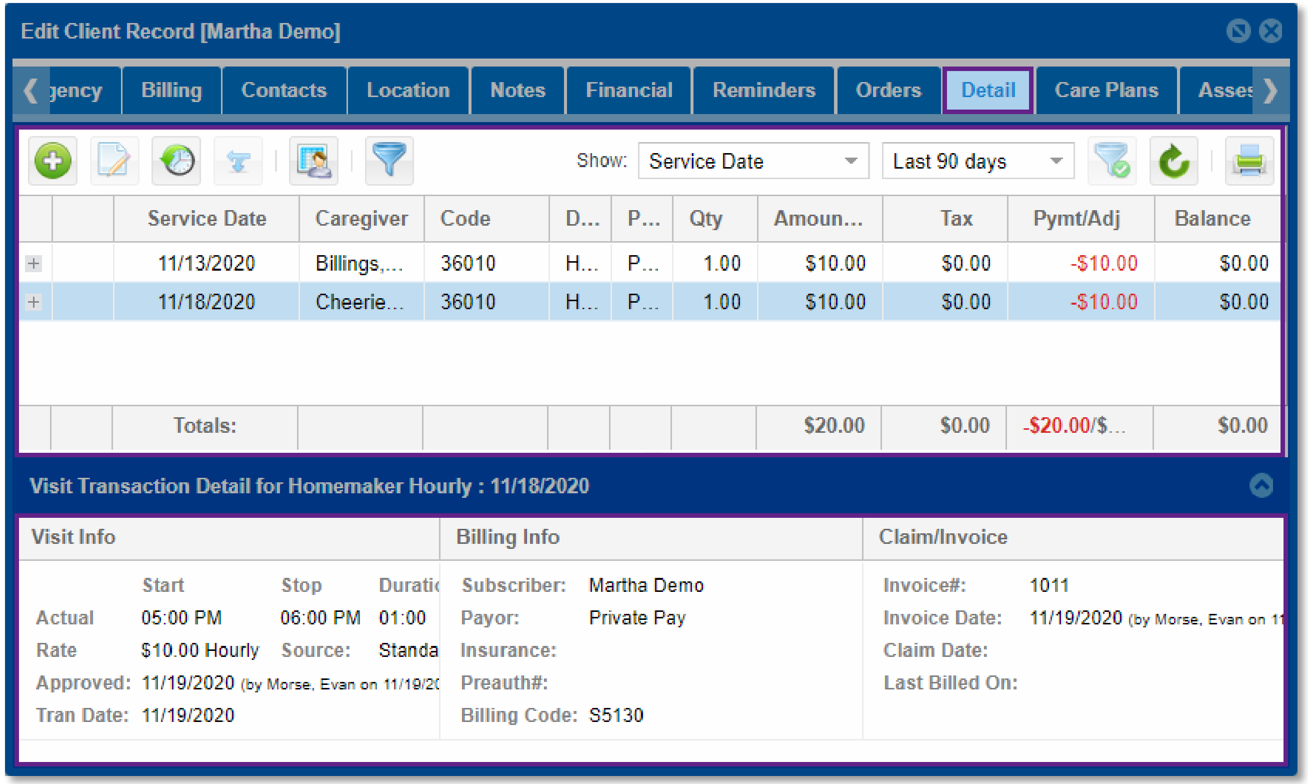
Client Settings > Details



Once a payment has been approved, review paid Invoices or Claims from the Details tab of a Client's Settings area.

Any unpaid Invoices or Claims will be viewable from this area, as will the current balance due on the Client account.

After following these steps, Martha, Charlie, and Katherine have all paid for their services and no longer have an outstanding balance in CareWhen.



Martha's Client Details page reflecting completed Invoice payments and a $0.00 balance on her account.

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