Take Charge! Program FY2020 Invoice and Billing Training

Slide 1- Cover Slide

Welcome to Fiscal Year 2020 Take Charge! Program Invoice and Billing Training.

Slide 2- Before Proceeding with Training

Please have Take Charge! Invoice template for Fiscal Year 2020 ready for easy reference. There is a skill assessment at the end of the training. The training and skill assessment will take approximately 20 minutes to complete. Please find a quiet place to work independently on your skill assessment.

Slide 3- Who should take the Take Charge! Invoice Training?

The following individuals are required to take the Take Charge! Invoice and Billing Training.

- Billing staff
- Administrative assistant
- Basically any staff involved in preparing and submitting the Take Charge! invoice

If a third party billing service is being used, it is the contractor's responsibility to train the third party billing service.

Slide 4 - Goal and Objective

The goal for this training is to provide an opportunity for you to gain knowledge and skill in completion of the Breast and Cervical Cancer Invoice Template.

Upon completion of this training, you should be able to correctly complete the Breast and Cervical Cancer Invoice Template.

Slide 5 Take Charge! Contract Review Reminder

As a reminder, please review your Take Charge! contract multiple times a year for the following sections:

- Purpose of the contract
- Duties of the contractor
- Service Provision

Data Reporting

Screening Provision

Screening promotion

Billing and invoicing

It is very important that everyone who works with the Take Charge! program has a copy of the contract.

Slide 6 – Items needed to prepare a Take Charge! Invoice

The following items are needed to prepare a Take Charge! Invoice:

- The current fiscal year 2020 template, available in both Adobe and Excel version and can be fill out electronically or manually
- The completed program data collection forms: ODH form No. 274A, 274C, and 1342
- Instructions for completion of the data collection forms
- The copy of the eligibility letters and ODH Form No 1341/1341A
- The medical documentation related to the service(s) provided to the client

Slide 7 – Preparing a Take Charge! Invoice

After gathering the items mentioned on the previous slide, you will need to do the following 10 steps:

Step 1:

Review the completeness of the Take Charge! Program forms and accompanying paperwork.

Please note that Take Charge! Program forms must be completed in their entirety in order to process for payment.

Please refrain from submitting duplicate data collection forms and medical records.

Slide 8- Preparing a Take Charge! Invoice (cont.)

Step 2:

Match the data collection forms with the eligibility letters and/or ODH Form 1341/1341A.

Ensure the Client's Name, Date of Birth, Date of Service, Eligibility Letter or ODH Form 1341/1341A and medical documentation match the data collection forms.

If the Client's Name or Date of Birth is different from the Eligibility Letter or the ODH Form 1341/1341A, please provide proof of I.D. or write down correct name or Date of Birth on the eligibility letter or the ODH Form 1341/1341A.

The eligibility letter and/or ODH Form 1341/1341A must be current for the date of service.

Slide 9- Preparing a Take Charge! Invoice (cont.)

Step 3:

Determine if the client is enrolled in Medicaid by checking eligibility on the OHCA website located at the link listed below.

If the client is enrolled in Medicaid, please review the clients charges.

If there are screening or initial diagnostic services, bill Take Charge!

If there are NOT initial diagnostic services, bill Medicaid for the services

Take Charge! will not pay for family planning services.

Services not related to family planning may be billed to Take Charge! For example, cervical cancer screening or mammography that's not related to Family Planning.

Slide 10- Preparing a Take Charge! Invoice (cont.)

Step 4

Prepare a client log to submit with your invoice. It is not required but highly recommended.

The client log may contain the client's first and last name, date of birth, date of service and current CPT codes.

Step 5

Complete the invoice template by following the instructions on the following slides.

Slide 11 –

Before you begin, ensure you are using the correct invoice template.

Slide 12-

Complete the top section of the template.

Slide 13

Contractor name

Slide 14

Billing contact including the contact's name, billing address, city, state, zip code, phone and fax numbers.

Slide 15

Billing email address

Slide 16

Purchase order number

Slide 17

FEI number

Slide 18

Invoice number

This number MUST change every month and it is used to track payment.

Slide 19

Billing date

Slide 20

Month of service

Slide 21

Step 6

Calculate the quantity of each CPT code that you are seeking payment for and enter the quantity on the invoice template on the appropriate line in the correct column.

Slide 22

(no voice)

Slide 23

(no voice)

Slide 24

Step 7

The form will calculate the subtotal for you. Ensure you press enter after entering the quantity of the CPT codes or the form will not calculate correctly.

Slide 25

Step 8

The form will automatically add up the charges for each column if you completed step 7 correctly.

Slide 26

Step 9

The form will calculate the grand total automatically. However, if you change any of the quantities in one of the columns, you will need to clear the grand total box and press enter.

Slide 27

Step 10

Sign the invoice. It will NOT be processed if it is not signed

Slide 28

The person who signed the HIPAA agreement (ODH form No. 203 Confidentiality Agreement on Attachment C) will receive an invitation from Take Charge! prior to accessing www.box.com

You will be able to submit invoices using box dot com once the invitation has been accepted.

The next two slides explain how to submit the invoice through www.box.com.

Slide 29 – How to submit an invoice

To submit an invoice, you will need to access your www.box.com account.

After you have accessed box dot com, you will click the upload button located in the upper right corner of the screen.

You can choose if you want to upload a file or a folder.

After choosing a file or a folder, you will need to upload the document or documents by clicking upload.

It is important that you wait for the file to upload before logging out of www.box.com

Slide 30 – How to submit an invoice

The invoice and backup documents will be removed from www.box.com once it has been saved at the Take Charge! Administrative Office. This will alleviate confusion when you are uploading new files.

If you experience any difficulties submitting an invoice, please contact the Take Charge! Administrative office at 405.271.3619.

Slide 31 – Invoice Process at OSDH

There is a multiple step process prior to invoices being sent to OSDH Accounts Payable for reimbursement.

Upon receiving invoice, the Take Charge! staff

- Date stamps the invoice
- Creates an OSDH client log for each invoice
- Determines if the client is covered by Medicaid
- Determines if the client received services during the timeline of their eligibility letter or the ODH Form 1341/1341A

Slide 32 – Invoice Process at OSDH (cont.)

The Take Charge! Administrative Staff will review invoices and data collection forms for clarity, completeness, ability to enter data, verify if the clients have an abnormal finding and level of services provided.

If data collection forms appear to indicate the need of patient navigation services, they will be referred to the patient navigator.

Slide 33 – Invoice Process at OSDH (cont.)

The Take Charge! Administrative Staff checks the invoice for mathematical errors, adds any notes, corrections, or questions into the OSDH client log.

Correctly completed data collection forms will be entered into the CaST database.

Slide 34 – Invoice Process at OSDH (cont.)

The invoices will be logged into an OSDH tracking system and sent to accounts payable.

It is important to note that if the invoice or data collection forms are incomplete or if there are errors, the entire invoice will be returned to the contractor for corrections via www.box.com.

Slide 35 – When Invoice and Documents are Returned for Correction

When corrections are required, the entire invoice (including the data collection forms, eligibility letters and/or ODH Form 1341 or 1341A plus medical documentation) will be returned with the OSDH-prepared client log using www.box.com.

The contractor is responsible for:

- Reviewing the OSDH-prepared client log for indicated errors – both mathematical and documentation
- Correct the indicated errors and return the entire invoice including all forms and documentation to OSDH using Box.com
  - Draw a line through any mistakes, make the needed corrections and initial the corrected mistakes.
  - Whiteout or correction tape should NEVER be used on medical documentation

Once the corrected invoice is received through box dot com, the OSDH invoice review process will restart.

Instructions for submitting corrected invoices are posted on the Take Charge! website.

Slide 36 – Billing Cycle

Contractor shall submit only one invoice per month itemizing each service provided during the month.

An invoice must be submitted within 30 days of the end of the month in which services were delivered.

Slide 37 – FY2020 Invoice Schedule

This slide shows the billing deadlines for the month of service.

The invoice number may be different from this example. We recommend utilizing your purchase order number as a part of your invoice number.

Slide 38 - When Should Forms Be Submitted For Billing

Form 274A should be submitted with your monthly invoice when the form is complete, but the client may not be finished with screening care.

- Facilities that provide in-house breast and cervical screening service or facilities with sub-contract will also submit pathology report for Pap and HPV testing, radiology report and coupon

Form 1342 should be submitted when services have been provided along with medical documentation.

Please note: Client may not be finished with screenings or care

Slide 39- When Should Forms Be Submitted For Billing

Form 274C

When the form is complete, the client should be finished with receiving final diagnosis

- If the recommendation is for two or more months follow-up, the form is complete
- The form is complete once a final determination has been made (cancer or not cancer diagnosed)

If a woman has an abnormal finding that was paid by Take Charge! funds, CDC requires follow-up information (regardless of the payer source)

Slide 40 - Helpful Hints

Here are some helpful hints and reminders

Please ensure to use the current fiscal year 2020 invoice template.

Contractor shall submit ONE Invoice per month itemizing each service provided during the month or before the deadline to submit invoice.

It is the contractor's responsibility to maintain a current tracking system that includes award amount and expenditures. A tracking system template is available upon request.

Take Charge! is the payer of last resort, meaning that all other available resources must be first to be used before payment is expected.

Slide 41- Helpful Hints (cont.)

A Take Charge! letter of eligibility or ODH Form 1341 or 1341A is required to receive services in the program.

Take Charge Screening and Diagnostic Services Coupon (ODH Form No. 1342) is required to request and receive breast and/or cervical services.

Slide 42 – Proper paperwork to submit with an invoice

This chart shows what paperwork to submit with each form

Slide 43- Skill Assessment

The final thing to do, is to complete the skill assessment. The skill assessment is located on the Take Charge! website below the training files. If there is any issues with the skill assessment, please contact Take Charge! Administrative staff at 405-271-3619.

Slide 44 – Take Charge! Contact Information

This is the contact information for the Take Charge! Program.

The Take Charge! Toll free number is 1-888-669-5934.

The number for the Center for Chronic Disease Prevention and Health Promotion is 405-271-3619.

You can also email at cancerpcp@health.ok.gov, just please do not email any protected health/confidential information.

The fax number is 405-271-6315.

There is also a Take Charge! Website which you can find at the address below.

This concludes the audio portion of the training.