



## Batch Billing Training

## **Introduction:**

The ADIDIS Claims Batch Entry (CBE) system has been designed to speed up the ability to submit monthly billing of services, especially for residential services where the consumer and service code remain the same and only the dates and units change monthly. Once a claim has been submitted using CBE, the claim is handled exactly the same as a claim that has been submitted either through an 837 billing file or has been direct entered through the UI in ASAIS. No matter how a claim is submitted, it passes through all of the same adjudication rules and processing steps.

## **Process Overview:**

### **1. Identify/create batch**

- a. Based on client, service codes and dates
- b. Select matching clients – clients that match criteria listed in Step A and have not already had an activity
- c. Select clients - those to include in batch being created
- d. Create activities – will show under un-posted claims

### **2. Turn activities into claims**

- a. Select batch name
- b. Edit un-posted claims – make any necessary changes to the activity
- c. Save and complete – will lock the record so it cannot be changed unless the status is reversed
- d. Submit claim

On the My ADIDIS tab, click "Batch Claim Entry."

The screenshot shows the My ADIDIS web application interface. At the top, there is a navigation bar with a logo on the left, the text "Click Batch Claim Entry" in the center, and user information on the right: "Welcome, Charlene Weldon | My ADIDIS | Sign Out" and a "Role" dropdown menu set to "MR Provider" with a "GO" button. Below the navigation bar is a "File" section with a "Print" link. A search area contains a "Quick Search" box, dropdown menus for "Clients" and "Last Name", a "GO" button, and a "Participating" checkbox. A main navigation bar includes tabs for "MY ADIDIS" (highlighted), "CLIENTS", "PROVIDERS", "CLAIMS", "UTILITIES", and "REPORTS". The main content area is divided into "CLIENTS" and "TASKS" sections. Under "CLIENTS", there are buttons for "Alert Notes", "Unread Alert Notes", and "Authorizations". Under "TASKS", there are buttons for "My Management", "My Claims" (which is expanded to show "Bulk Void and Replace", "Batch Claim Entry" (highlighted in yellow), "Single Claim Entry", "Resubmission Queue", and "Pending Approval Queue"), and "My Files". A red arrow points from the text "Click Batch Claim Entry" in the top navigation bar to the "Batch Claim Entry" option in the "My Claims" dropdown menu. At the bottom left, the version number "v8.1.2.0" is displayed, and at the bottom right, there is an "About" link.

Complete the “Batch Claim Entry” information. Fields with an asterisk \* are required. The Program field should default to the provider name. Select the correct Service Type from the drop down menu, based on the service code for which you are billing.

The screenshot displays the 'Batch Claim Entry' web application interface. At the top, there is a header bar containing a logo on the left, user information 'Welcome, Charlene Weldon 10/19/2015 10:17 AM' in the center, and the page title 'Batch Claim Entry' on the right. Below the header is a 'File' menu with options: 'File', 'Spell Check', 'Print', and 'Close Batch Claim Entry'. The main content area is a form titled 'Batch Claim Entry' with the following fields and controls:

- Program\***: A dropdown menu showing 'Division of Developmental Disabilities' with a 'Details' link.
- Service Type\***: A dropdown menu.
- Service Code\***: A text input field with a 'Clear' button.
- Unit Type**: A text input field.
- Start Date\***: A date picker.
- End Date\***: A date picker.
- Total Units**: A text input field with the value '0'.
- Batch No**: A text input field with the value 'cweldon105'.
- Place Of Service**: A dropdown menu.
- Existing Batches**: A dropdown menu.

At the bottom of the form, there are two buttons: 'Select Matching Consumers' and 'Edit Un-posted Claims'.

To select a Service Code, click on the ellipsis. The Webpage Dialog box will appear.

Click on the ellipsis for the Service Code Webpage Dialog to appear

Welcome, Charlene Weldon  
10/19/2015 11:21 AM

Batch Claim Entry

File

File -- Spell Check ----- Print - Close Batch Claim Entry

Batch Claim Entry

Program\* Division of Developmental Disabilities details

Service Type\*

Service Code\* ... Clear Unit Type

Start Date\*

End Date\*

Total Units

Place Of Service

DialogVendorServiceSelectPopUp -- Webpage Dialog

https://fwtest.harmonyis.net/AlabamaTest/Dialogs/DialogVendorServiceSelectPopUp.aspx?VendorID=124&AuthID=0&

Search By: Service Type Search Text: Search Cancel

ServiceID	ServiceCode	SecondaryCode	Service	UnitCost	UnitType	EffectiveDate	EndDate	VServiceID	MaxAuth	Used	Remaining
3653	92507 UD HW	92507 UD HW	Self-Directed Speech Therapy	14.30	Encounter	04/01/2013	09/30/2014	49684	0	0	0
3653	92507 UD HW	92507 UD HW	Self-Directed Speech Therapy	60.06	Encounter	10/01/2014		51807	0	0	0
3730	92507:UC:HW	92507	Self-Directed Speech Therapy	60.06	Encounter	10/01/2014		57262	0	0	0
3727	97110:UC:HW	97110	Self-Directed Physical Therapist	14.30	15 Mins	10/01/2014		57259	0	0	0
3652	97110:UD:HW	97110:UD:HW	Self-Directed Physical Therapist	14.30	15 Mins	04/01/2013		49683	0	0	0

The following filters are available: Service Category, Service Code, Secondary Code, Service, and Description. The example shown below uses the filter Service Code. Enter search text and click Search.

The screenshot shows a web application interface for "Batch Claim Entry". At the top, there is a header with a logo, the text "Choose the filter to search by and enter search text.", a user greeting "Welcome, Charlene Weldon 10/19/2015 11:28 AM", and a "Batch Claim Entry" button. Below the header is a menu bar with "File" and a toolbar with "File", "Spell Check", "Print", and "Close Batch Claim Entry". The main area contains a form with fields for "Program\*", "Service Type\*", "Service Code\*", "Start Date\*", "End Date\*", "Total Units", and "Place Of Service". A search dialog box titled "DialogVendorServiceSelectPopUp -- Webpage Dialog" is overlaid on the form. The dialog box has a search bar with a dropdown menu set to "Service Code" and a search text field containing "t1019:uc". A "Search" button is circled in red. Below the search bar is a table with the following data:

ServiceID	ServiceCode	SecondaryCode	Service	UnitCost	UnitType	EffectiveDate	EndDate	VServiceID	MaxAuth	Used	Remaining
118	T1019:UC	T1019	Personal Care	3.55	15 Mins	10/01/2011	08/31/2012	34318	0	0	0
118	T1019:UC	T1019	Personal Care	3.78	15 Mins	09/01/2012	08/31/2013	37632	0	0	0
118	T1019:UC	T1019	Personal Care	3.90	15 Mins	09/01/2013		44687	0	0	0
3330	T1019:UC:HN	T1019	Self-Directed Personal Care	3.38	15 Mins	06/01/2012	08/31/2013	34287	0	0	0
3330	T1019:UC:HN	T1019	Self-Directed Personal Care	3.48	15 Mins	09/01/2013		45084	0	0	0

Choose the appropriate line item for the service code for which you wish to bill, and the system will auto populate the Service Code field on the form.

**Click on the line of the Service Code for which you wish to bill.**

Welcome, Charlene Weldon  
10/19/2015 11:26 AM

**Batch Claim Entry**

File

File -- Spell Check ----- Print - Close Batch Claim Entry

Batch Claim Entry

Program\* Division of Developmental Disabilities Details

Service Type\* MRW

Service Code\* ... Clear Unit Type

Start Date\*

End Date\*

Total Units

Place Of Service

DialogVendorServiceSelectPopUp -- Webpage Dialog

https://fwtest.harmonyis.net/AlabamaTest/Dialogs/DialogVendorServiceSelectPopUp.aspx?VendorID=124&AuthID=0&


Search By: Service Code Search Text: t1019:uc Search Cancel

ServiceID	ServiceCode	SecondaryCode	Service	UnitCost	UnitType	EffectiveDate	EndDate	VServiceID	MaxAuth	Used	Remaining
118	T1019:UC	T1019	Personal Care	3.55	15 Mins	10/01/2011	08/31/2012	34318	0	0	0
118	T1019:UC	T1019	Personal Care	3.78	15 Mins	09/01/2012	08/31/2013	37632	0	0	0
118	T1019:UC	T1019	Personal Care	3.90	15 Mins	09/01/2013		44687	0	0	0
3330	T1019:UC:HN	T1019	Self-Directed Personal Care	3.38	15 Mins	06/01/2012	08/31/2013	34287	0	0	0
3330	T1019:UC:HN	T1019	Self-Directed Personal Care	3.48	15 Mins	09/01/2013		45084	0	0	0

The Start Date and End Date fields are required. The dates may be directly typed into the field or the calendar icon may be used to populate the dates. Enter the remaining applicable fields such as Total Units and Place of Service. These items may be edited on a per claim basis in the next steps. The Batch No field is automatically populated. However, this field is editable so you may name your batch as you choose.

Welcome, Charlene Weldon 10/19/2015 11:32 AM		<b>Batch Claim Entry</b>	
File			
File -- Spell Check - - - - - Print - Close Batch Claim Entry			
Batch Claim Entry			
Program*	Division of Developmental Disabilities	<a href="#">Details</a>	
Service Type*	MRW		
Service Code*	T1019:UC:HN	Unit Type	15 mins
Start Date*	08/01/2015		
End Date*	08/31/2015		
Total Units	31	Batch No	cweldon82
Place Of Service	99 - Other	Existing Batches	
Select Matching Consumers		Edit Un-posted Claims	

Click on the Select Matching Consumers button to select records for consumers with authorizations that meet the criteria entered.



**Click Select Matching Consumers**

File

Welcome, Charlene Weldon  
10/19/2015 11:38 AM

**Batch Claim Entry**

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File - Create Activities - Spell Check - - - - - Print - Close Batch Claim Entry

**Batch Claim Entry**

<b>Program*</b>	Division of Developmental Disabilities <span style="font-size: x-small; color: blue;">Details</span>		
<b>Service Type*</b>	MRW		
<b>Service Code*</b>	T1019:UC:HN <span style="font-size: x-small;">... Clear</span>	<b>Unit Type</b>	15 mins
<b>Start Date*</b>	8/1/2015 <span style="font-size: x-small;">...</span>		
<b>End Date*</b>	8/31/2015 <span style="font-size: x-small;">...</span>		
<b>Total Units</b>	31	<b>Batch No</b>	cweldon82
<b>Place Of Service</b>	99 - Other <span style="font-size: x-small;">...</span>	<b>Existing Batches</b>	<span style="font-size: x-small;">...</span>

Select Matching Consumers

Edit Un-posted Claims

43 Consumer Record(S) Returned - Now Viewing 1 Through 15

Consumer	Case No	Start Date	End Date	Units	Cost	Place Of Service	Diagnosis	Claim #	Apply <input type="checkbox"/>
A		8/1/2015 <span style="font-size: x-small;">...</span>	8/31/2015 <span style="font-size: x-small;">...</span>	31	\$107.88	99 - Other <span style="font-size: x-small;">...</span>	317 <span style="font-size: x-small;">...</span>		<input checked="" type="checkbox"/>
A		8/1/2015 <span style="font-size: x-small;">...</span>	8/31/2015 <span style="font-size: x-small;">...</span>	31	\$107.88	99 - Other <span style="font-size: x-small;">...</span>	3181 <span style="font-size: x-small;">...</span>		<input checked="" type="checkbox"/>
A		8/1/2015 <span style="font-size: x-small;">...</span>	8/31/2015 <span style="font-size: x-small;">...</span>	31	\$107.88	99 - Other <span style="font-size: x-small;">...</span>	3182 <span style="font-size: x-small;">...</span>		<input checked="" type="checkbox"/>
B		8/1/2015 <span style="font-size: x-small;">...</span>	8/31/2015 <span style="font-size: x-small;">...</span>	31	\$107.88	99 - Other <span style="font-size: x-small;">...</span>	3181 <span style="font-size: x-small;">...</span>		<input checked="" type="checkbox"/>

This view defaults to 15 records shown. To show more records on a page, change the retrieve number from 15 to the desired number of consumer records to be returned. Click on Next to display all requested records. It is recommended to view no more than 100 clients per page.

**43 Consumer Record(S) Returned - Now Viewing 1 Through 15** ← **The view defaults to 15 records shown at a time**


Consumer	Case No	Start Date	End Date	Units	Cost	Place Of Service	Diagnosis	Claim #	Apply <input checked="" type="checkbox"/>
		8/1/2015	8/31/2015	31	\$107.88	99 - Other	317		<input checked="" type="checkbox"/>
		8/1/2015	8/31/2015	31	\$107.88	99 - Other	318		<input checked="" type="checkbox"/>
		8/1/2015	8/31/2015	31	\$107.88	99 - Other	3181		<input checked="" type="checkbox"/>
H		8/1/2015	8/31/2015	31	\$107.88	99 - Other	3180		<input checked="" type="checkbox"/>

Navigation: << First < Previous Retrieve **15** Records At A Time Next > Last >>

**Enter the number of records here that you would like to view and click next**

Total \$1,618.20  Calculate Total

Remove the CHECK mark from the Apply All option box.



**Remove the check mark from the Apply option box.**

Welcome, Charlene Weldon  
10/19/2015 11:38 AM

**Batch Claim Entry**

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File

File - Create Activities - Spell Check - - - - - Print - Close Batch Claim Entry

**Batch Claim Entry**

Program*	Division of Developmental Disabilities <span style="font-size: small;">Details</span>		
Service Type*	MRW		
Service Code*	T1019:UC:HN <span style="font-size: x-small;">... Clear</span>	Unit Type	15 mins
Start Date*	8/1/2015 <span style="font-size: x-small;">...</span>		
End Date*	8/31/2015 <span style="font-size: x-small;">...</span>		
Total Units	31	Batch No	cweldon02
Place Of Service	99 - Other	Existing Batches	<span style="font-size: x-small;">...</span>

Select Matching Consumers
Edit Un-posted Claims

43 Consumer Record(S) Returned - Now Viewing 1 Through 15

Consumer	Case No	Start Date	End Date	Units	Cost	Place Of Service	Diagnosis	Claim #	Apply <input checked="" type="checkbox"/>
A		8/1/2015 <span style="font-size: x-small;">...</span>	8/31/2015 <span style="font-size: x-small;">...</span>	31	\$107.88	99 - Other	317 <span style="font-size: x-small;">...</span>		<input checked="" type="checkbox"/>
A		8/1/2015 <span style="font-size: x-small;">...</span>	8/31/2015 <span style="font-size: x-small;">...</span>	31	\$107.88	99 - Other	3181 <span style="font-size: x-small;">...</span>		<input checked="" type="checkbox"/>
A		8/1/2015 <span style="font-size: x-small;">...</span>	8/31/2015 <span style="font-size: x-small;">...</span>	31	\$107.88	99 - Other	3182 <span style="font-size: x-small;">...</span>		<input checked="" type="checkbox"/>
B		8/1/2015 <span style="font-size: x-small;">...</span>	8/31/2015 <span style="font-size: x-small;">...</span>	31	\$107.88	99 - Other	3181 <span style="font-size: x-small;">...</span>		<input checked="" type="checkbox"/>

At the bottom of the screen, click on the Calculate Total button. With all Apply boxes unchecked, the Total displays \$0.00. As records are selected for batch claim, selecting the Calculate Total will show the cumulative calculated amount.

		8/1/2015	8/31/2015	31	\$107.88	99 - Other	3181	<input type="checkbox"/>
		8/1/2015	8/31/2015	31	\$107.88	99 - Other	3180	<input type="checkbox"/>

<< First < Previous Retrieve 43 Records At A Time Next > Last >>

Total \$0.00 Calculate Total



To save the batch, click on Create Activities. The screen will refresh and remove all services that were created.

FILE

File - **Create Activities** - Spell Check - - - - - Print - Close Batch Claim Entry

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**Batch Claim Entry**

Program\*  Details

Service Type\*

Service Code\*  ... Clear

Unit Type

Start Date\*

End Date\*

Total Units

Batch No

Place Of Service

Existing Batches

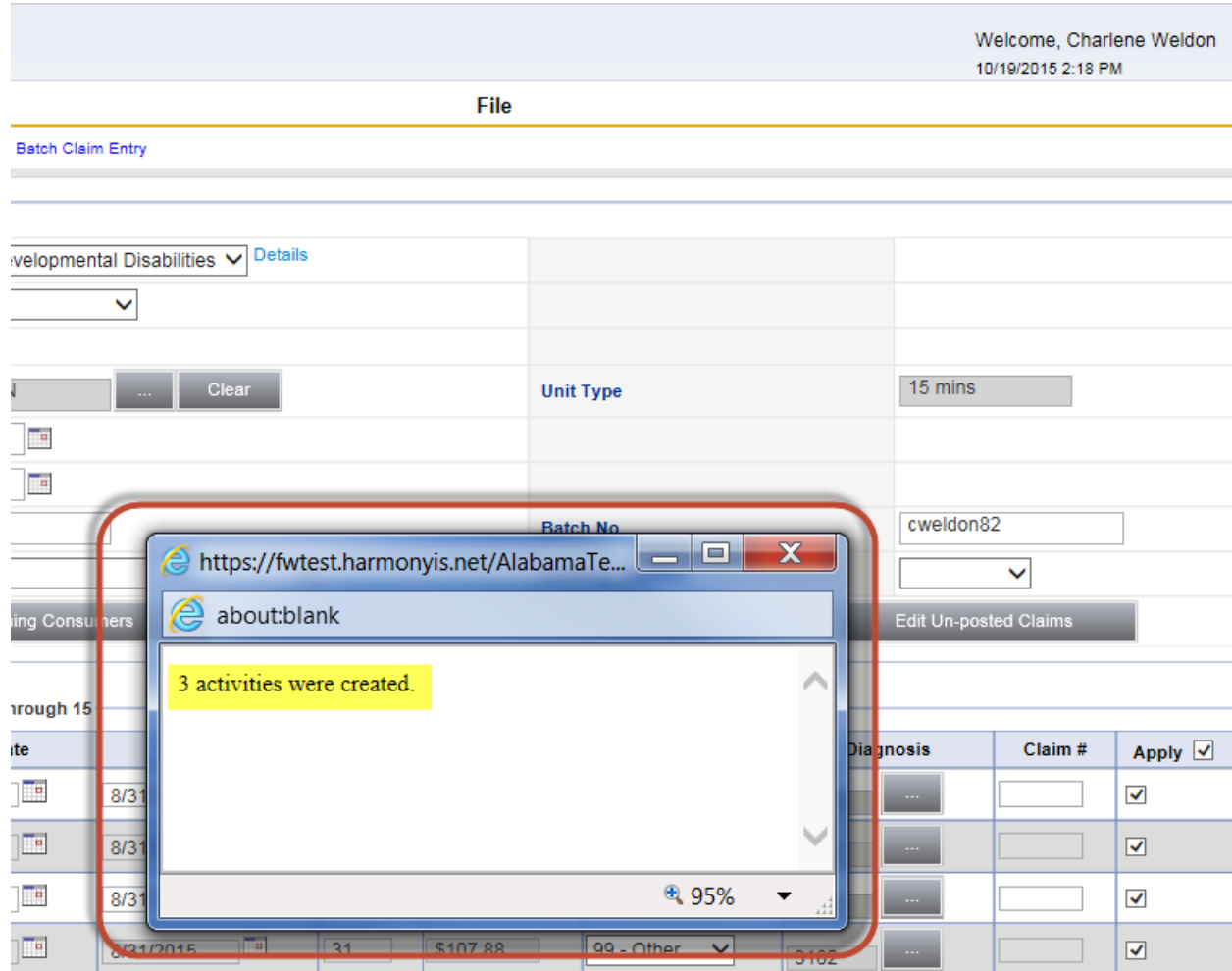
Select Matching Consumers

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43 Consumer Record(S) Returned - Now Viewing 1 Through 15

Consumer	Case No	Start Date	End Date	Units	Cost	Place Of Service	Diagnosis	Claim #	Apply <input type="checkbox"/>
		<input type="text" value="8/1/2015"/>	<input type="text" value="8/31/2015"/>	<input type="text" value="31"/>	<input type="text" value="\$107.88"/>	<input type="text" value="99 - Other"/>	<input type="text" value="317"/> ...	<input type="text" value=""/>	<input checked="" type="checkbox"/>
		<input type="text" value="8/1/2015"/>	<input type="text" value="8/31/2015"/>	<input type="text" value="31"/>	<input type="text" value="\$107.88"/>	<input type="text" value="99 - Other"/>	<input type="text" value="3181"/> ...	<input type="text" value=""/>	<input type="checkbox"/>
		<input type="text" value="8/1/2015"/>	<input type="text" value="8/31/2015"/>	<input type="text" value="28"/>	<input type="text" value="\$97.44"/>	<input type="text" value="99 - Other"/>	<input type="text" value="3182"/> ...	<input type="text" value=""/>	<input checked="" type="checkbox"/>
		<input type="text" value="8/1/2015"/>	<input type="text" value="8/31/2015"/>	<input type="text" value="31"/>	<input type="text" value="\$107.88"/>	<input type="text" value="99 - Other"/>	<input type="text" value="3181"/> ...	<input type="text" value=""/>	<input checked="" type="checkbox"/>

A dialog box will appear showing the number of activities created. Select the X in the upper right corner of the box to close it.



To review and make any necessary edits to the batch, click on the Edit Un-Posted Claims button. If necessary, edit the service lines.

File - Create Activities - Spell Check - - - - - Print - Close Batch Claim Entry

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**Batch Claim Entry**

<b>Program*</b>	Division of Developmental Disabilities <a href="#">Details</a>		
<b>Service Type*</b>	MRW		
<b>Service Code*</b>	T1019:UC:HN <input type="button" value="..."/> <input type="button" value="Clear"/>	<b>Unit Type</b>	15 mins
<b>Start Date*</b>	8/1/2015 <input type="button" value="Calendar"/>		
<b>End Date*</b>	8/31/2015 <input type="button" value="Calendar"/>		
<b>Total Units</b>	31	<b>Batch No</b>	cweldon82
<b>Place Of Service</b>	99 - Other	<b>Existing Batches</b>	<input type="button" value="v"/>
<input type="button" value="Select Matching Consumers"/>		<input type="button" value="Edit Un-posted Claims"/>	

If no additional edits are needed, select the Save & Complete option. All activities will be changed to a read-only status.

Welcome, Charlene Weldon  
 10/19/2015 2:23 PM

**Batch Claim Entry**

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File

File - Spell Check - Save - Save & Complete - Submit Claims - Print - Close Batch Claim Entry

**Batch Claim Entry**

Program*	Division of Developmental Disabilities <span style="font-size: small;">Details</span>		
Service Type*	MRW		
Service Code*	T1019 UC:HN <span style="font-size: x-small;">...</span> <span style="font-size: x-small;">Clear</span>	Unit Type	15 mins
Start Date*	8/1/2015 <span style="font-size: x-small;">...</span>		
End Date*	8/31/2015 <span style="font-size: x-small;">...</span>		
Total Units	31	Batch No	cweldon82
Place Of Service	99 - Other	Existing Batches	

Select Matching Consumers
Edit Un-posted Claims

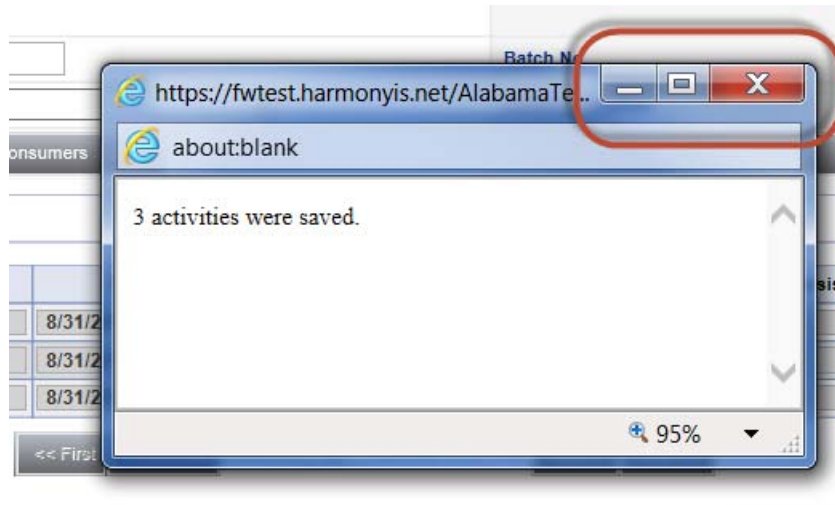
- 3 Activity Record(S) Returned - Now Viewing 1 Through 3 -

Activity ID	Consumer	Case No	Start Date	End Date	Units	Cost	Place Of Service	Diagnosis	Claim #	Apply <input checked="" type="checkbox"/>
838149			8/1/2015 <span style="font-size: x-small;">...</span>	8/31/2015 <span style="font-size: x-small;">...</span>	31	\$107.88	99 - Other	317 <span style="font-size: x-small;">...</span>		<input checked="" type="checkbox"/>
838150			8/1/2015 <span style="font-size: x-small;">...</span>	8/31/2015 <span style="font-size: x-small;">...</span>	28	\$97.44	99 - Other	3182 <span style="font-size: x-small;">...</span>		<input checked="" type="checkbox"/>
838151			8/1/2015 <span style="font-size: x-small;">...</span>	8/31/2015 <span style="font-size: x-small;">...</span>	31	\$107.88	99 - Other	3181 <span style="font-size: x-small;">...</span>		<input checked="" type="checkbox"/>

<< First < Previous Retrieve 15 Records At A Time Next > Last >>

Total \$313.20 Calculate Total

A dialog box will appear stating the number of activities saved and the Activity ID is complete. Click on the X in the right corner to close the box.



Submit the batch by clicking Submit Claims. Only completed services (changed to read-only) can be submitted.

File

File -- Spell Check -- Save -- Save & Complete -- **Submit Claims** -- Reverse Status -- Print -- Close Batch Claim Entry

Batch Claim Entry

Program\* Division of Developmental Disabilities Details

Service Type\* MRW

Service Code\* T1019:UC:HN Clear Unit Type 15 mins

Start Date\* 8/1/2015

End Date\* 8/31/2015

Total Units 31 Batch No cweldon82

Place Of Service 99 - Other Existing Batches

Select Matching Consumers Edit Un-posted Claims

3 Activity Record(S) Returned - Now Viewing 1 Through 3

Activity ID	Consumer	Case No	Start Date	End Date	Units	Cost	Place Of Service	Diagnosis	Claim #	Apply
										<input checked="" type="checkbox"/>

A dialog box will confirm the number of claims submitted.

