



Batch Billing Training
Revised 3-29-2016

Table of Contents

Introduction:..... **Error! Bookmark not defined.**
Process Overview: 3
CBE in a Single Session: **Error! Bookmark not defined.**

The ASAIS 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 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

CBE in a Single Session

These instructions describe how to create a batch of claims and process them in a single session.

[File](#) - [Create Activities](#) - [Spell Check](#) - [Print](#) - [Close Batch Claim Entry](#)

Batch Claim Entry

Program*	<input type="text" value=""/>	Details	
Service Type*	3 SA		
Service Code*	4 H0020:HF <input type="button" value="Clear"/>	Facility	<input type="text" value=""/> 8
Start Date*	5 10/1/2015	Unit Type	Day
End Date*	10/31/2015		
Total Units	6 31	Batch No	Oct 2015 9
Place Of Service	7 53 - Community Mental Health Care	Existing Batches	<input type="text" value=""/>
	10 <input type="button" value="Select Matching Consumers"/>		<input type="button" value="Edit Un-posted Claims"/>

1. Log into AS AIS		
2. Batch Claim Entry		Select Batch Claim Entry
3. Select Service Type	SA	Select SA from drop down
4. Select Service Code	Example H0020:HF	<ul style="list-style-type: none"> This will be filtered based on the service type selected.
5. Enter start and end dates.	Example: start date 10/1/2015– end date 10/31/2015	<ul style="list-style-type: none"> Enter start and end date
6. Enter number of Units	Example: 31 units	<ul style="list-style-type: none"> Enter the number of units based on start/end dates. The units default to 0. If the default is left, then the user will need to manually update each line. Any service line with 0 units will not be able to be saved.
7. Select Place of Service	53 – Community Mental Health Care	<ul style="list-style-type: none"> This currently defaults to 99, please select 53 – Community Mental Health Care for Medicaid Services, recommended to use 53 for all services.
8. Select Facility		<ul style="list-style-type: none"> Select Facility in drop down box
9. Enter Batch No	Example: Oct 2015	<ul style="list-style-type: none"> You can leave your batch name as the default or you can modify it.
10. Click “Select Matching Consumers”		

11. Enter the number of clients that display in the retrieve box
12. Enter the number of clients that display in the Retrieve box then hit Next – if more than 98 enter 98 then hit next. You can only have 98 clients in a batch.

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

Batch Claim Entry

Program* [Redacted] Details

Service Type* SA

Service Code* H0020:HF Clear

Start Date* 10/1/2015

End Date* 10/31/2015

Total Units 31

Place Of Service 53 - Community Mental Health Care

Facility [Redacted]

Unit Type Day

Batch No Oct 2015

Existing Batches

Select Matching Consumers Edit Un-posted Claims

16 Consumer Record(s) Returned - Now Viewing 1 Through 5

Consumer	Case No	Start Date	End Date	Units	Cost	Place Of Service	Diagnosis	Claim #	Apply
[Redacted]	[Redacted]	10/1/2015	10/31/2015	31	\$350.61	53 - Commu	F1120		<input checked="" type="checkbox"/>
[Redacted]	[Redacted]	10/1/2015	10/31/2015	31	\$350.61	53 - Commu	F1120		<input checked="" type="checkbox"/>
[Redacted]	[Redacted]	10/1/2015	10/31/2015	31	\$350.61	53 - Commu	F1120		<input checked="" type="checkbox"/>
[Redacted]	[Redacted]	10/1/2015	10/31/2015	31	\$350.61	53 - Commu	F1120		<input checked="" type="checkbox"/>
[Redacted]	[Redacted]	10/1/2015	10/31/2015	31	\$350.61	53 - Commu	F1120		<input checked="" type="checkbox"/>

<< First < Previous Retrieve 16 Records At A Time Next > Last >>

Total \$1,753.05 Calculate Total

13. Click “Select Matching Consumers”

The screenshot shows the 'Batch Claim Entry' form. The 'Program' is set to [redacted], 'Service Type' is 'SA', 'Service Code' is 'H0020.HF', 'Start Date' is '10/1/2015', 'End Date' is '10/31/2015', 'Total Units' is '31', and 'Place Of Service' is '53 - Community Mental Health Care'. A red arrow points to the 'Select Matching Consumers' button at the bottom of the form.

14. Remove the check in the Apply column (this removes all the checks for each individual client) and Click “Calculate Total” (should be \$0.00)

The screenshot shows the 'Batch Claim Entry' form with a table of consumer records. The table has columns for Consumer, Case No, Start Date, End Date, Units, Cost, Place Of Service, Diagnosis, Claim #, and Apply. A red circle highlights the 'Apply' column, and a red arrow points to the 'Calculate Total' button. The total amount is shown as \$0.00.

Consumer	Case No	Start Date	End Date	Units	Cost	Place Of Service	Diagnosis	Claim #	Apply
[redacted]		10/1/2015	10/31/2015	31	\$350.61	53 - Commu	F1120		<input type="checkbox"/>
[redacted]		10/1/2015	10/31/2015	31	\$350.61	53 - Commu	F1120		<input type="checkbox"/>
[redacted]		10/1/2015	10/31/2015	31	\$350.61	53 - Commu	F1120		<input type="checkbox"/>
[redacted]		10/1/2015	10/31/2015	31	\$350.61	53 - Commu	F1120		<input type="checkbox"/>
[redacted]		10/1/2015	10/31/2015	31	\$350.61	53 - Commu	F1120		<input type="checkbox"/>

Total: \$0.00

15. Adjust individual clients as needed
 Example: If client received service for 10/1/2015 thru 10/28/2015 click on end date change the end date to 10/28/2015 hit the "TAB" key then adjust the number of units to 28 hit the "TAB" key in the APPLY column click on the box to enter a check mark. Make sure there is a diagnosis in the box if not select the eclipse box manually enter the diagnosis.

16. Click "Calculate Total"
 Click Calculate total at the bottom of the page, verify the amount adjusted to the new total of units.

17. Continue to adjust any other client or if the client does not need any adjustment check the "Apply" column box. (for a max of 98 clients)

18. When finished Select Calculate Total

16 Consumer Record(S) Returned - Now Viewing 1 Through 5

Consumer	Case No	Start Date	End Date	Units	Cost	Place Of Service	Diagnosis	Claim #	Apply
[REDACTED]	[REDACTED]	10/1/2015	10/28/2015	28	\$316.68	53 - Commu	F1120		<input checked="" type="checkbox"/>
[REDACTED]	[REDACTED]	10/1/2015	10/31/2015	31	\$350.61	53 - Commu	F1120		<input type="checkbox"/>
[REDACTED]	[REDACTED]	10/1/2015	10/31/2015	31	\$350.61	53 - Commu	F1120		<input type="checkbox"/>
[REDACTED]	[REDACTED]	10/1/2015	10/31/2015	31	\$350.61	53 - Commu	F1120		<input type="checkbox"/>
[REDACTED]	[REDACTED]	10/1/2015	10/31/2015	31	\$350.61	53 - Commu	F1120		<input type="checkbox"/>

Total \$316.68 Calculate Total

- At the top of the page select Create Activities.

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

Batch Claim Entry

Program* [Redacted] Details

Service Type* SA

Service Code* H0020:HF Clear

Start Date* 10/1/2015

End Date* 10/31/2015

Total Units 31

Place Of Service 53 - Community Mental Health Care

Facility [Redacted]

Unit Type Day

Batch No Oct 2015

Existing Batches [Redacted]

Select Matching Consumers Edit Un-posted Claims

16 Consumer Record(s) Returned - Now Viewing 1 Through 5

Consumer	Case No	Start Date	End Date	Units	Cost	Place Of Service	Diagnosis	Claim #	Apply
[Redacted]	[Redacted]	10/1/2015	10/28/2015	28	\$316.68	53 - Commu	F1120		<input checked="" type="checkbox"/>
[Redacted]	[Redacted]	10/1/2015	10/29/2015	29	\$327.99	53 - Commu	F1120		<input checked="" type="checkbox"/>
[Redacted]	[Redacted]	10/1/2015	10/31/2015	31	\$350.61	53 - Commu	F1120		<input checked="" type="checkbox"/>
[Redacted]	[Redacted]	10/1/2015	10/31/2015	31	\$350.61	53 - Commu	F1120		<input checked="" type="checkbox"/>
[Redacted]	[Redacted]	10/1/2015	10/31/2015	31	\$350.61	53 - Commu	F1120		<input checked="" type="checkbox"/>

<< First < Previous Retrieve 5 Records At A Time Next > Last >>

Total \$1,696.50 Calculate Total

20 Window will appear with the number of clients that were create in batch. Click on the right corner red X to close window.


The screenshot shows the 'Batch Claim Entry' form with the following fields: Program (dropdown), Service Type (SA), Service Code (H0020-HF), Start Date (10/1/2015), End Date (10/31/2015), Total Units (31), and Place Of Service (53 - Community Mental Health Care). A modal dialog box is open in the center, displaying '5 activities were created.' with a red arrow pointing to the number '20' in a white box above it. Below the form is a table with 11 consumer records.

Consumer	Case No	Start Date	End Date	Units	Amount	Facility	Unit Type	Diagnosis	Claim #	Apply
[Redacted]		10/1/2015	10/31/2015	31	\$350.61	53 - Commu		F1120		<input checked="" type="checkbox"/>
[Redacted]		10/1/2015	10/31/2015	31	\$350.61	53 - Commu		F1120		<input checked="" type="checkbox"/>
[Redacted]		10/1/2015	10/31/2015	31	\$350.61	53 - Commu		F1120		<input checked="" type="checkbox"/>
[Redacted]		10/1/2015	10/31/2015	31	\$350.61	53 - Commu		F1120		<input checked="" type="checkbox"/>
[Redacted]		10/1/2015	10/31/2015	31	\$350.61	53 - Commu		F1120		<input checked="" type="checkbox"/>

21. Using the drop down arrow on Existing Batch field select the batch name that was used to create this batch then select Edit Unposted Claims.

This screenshot shows the same 'Batch Claim Entry' form as above, but with the 'Existing Batches' dropdown menu open. The menu lists 'Oct 2015' and is highlighted with a red arrow. Another red arrow points to the 'Edit Unposted Claims' button at the bottom right. A white box with the number '21' is positioned near the dropdown menu.

22. The claims will display that were created in batch. Select at the top of the page Save & Complete



22

Welcome, [Redacted] Assess/Methadone
 3/28/2016 4:02 PM

Batch Claim Entry

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

Batch Claim Entry

Program*	<input type="text" value="[Redacted]"/>	Details			
Service Type*	<input type="text" value="SA"/>		Facility	<input type="text" value="[Redacted]"/>	
Service Code*	<input type="text" value="H0020:HF"/> <input type="button" value="Clear"/>		Unit Type	<input type="text" value="Day"/>	
Start Date*	<input type="text" value="10/1/2015"/>				
End Date*	<input type="text" value="10/31/2015"/>				
Total Units	<input type="text" value="31"/>		Batch No	<input type="text" value="Oct 2015"/>	
Place Of Service	<input type="text" value="99 - Other"/>		Existing Batches	<input type="text" value="Oct 2015"/>	
<input type="button" value="Select Matching Consumers"/>			<input type="button" value="Edit Un-posted Claims"/>		

5 Activity Record(S) Returned - Now Viewing 1 Through 5

Activity ID	Consumer	Case No	Start Date	End Date	Units	Cost	Place Of Service	Diagnosis	Claim #	Apply <input checked="" type="checkbox"/>
[Redacted]	[Redacted]	[Redacted]	<input type="text" value="10/1/2015"/>	<input type="text" value="10/29/2015"/>	<input type="text" value="28"/>	<input type="text" value="\$316.68"/>	<input type="text" value="53 - Communi"/>	<input type="text" value="F1120"/>	<input type="text"/>	<input checked="" type="checkbox"/>
[Redacted]	[Redacted]	[Redacted]	<input type="text" value="10/1/2015"/>	<input type="text" value="10/29/2015"/>	<input type="text" value="29"/>	<input type="text" value="\$327.99"/>	<input type="text" value="53 - Communi"/>	<input type="text" value="F1120"/>	<input type="text"/>	<input checked="" type="checkbox"/>
[Redacted]	[Redacted]	[Redacted]	<input type="text" value="10/1/2015"/>	<input type="text" value="10/31/2015"/>	<input type="text" value="31"/>	<input type="text" value="\$350.61"/>	<input type="text" value="53 - Communi"/>	<input type="text" value="F1120"/>	<input type="text"/>	<input checked="" type="checkbox"/>
[Redacted]	[Redacted]	[Redacted]	<input type="text" value="10/1/2015"/>	<input type="text" value="10/31/2015"/>	<input type="text" value="31"/>	<input type="text" value="\$350.61"/>	<input type="text" value="53 - Communi"/>	<input type="text" value="F1120"/>	<input type="text"/>	<input checked="" type="checkbox"/>
[Redacted]	[Redacted]	[Redacted]	<input type="text" value="10/1/2015"/>	<input type="text" value="10/31/2015"/>	<input type="text" value="31"/>	<input type="text" value="\$350.61"/>	<input type="text" value="53 - Communi"/>	<input type="text" value="F1120"/>	<input type="text"/>	<input checked="" type="checkbox"/>

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

Total

23. Window will display with the number of claims created in batch. Right corner click on the red X to close window.

The screenshot shows the 'Batch Claim Entry' form with a modal window in the center. The modal window contains the text '5 activities were saved.' and is circled in red. The form fields include Program, Service Type (SA), Service Code (H0020:HF), Start Date (10/1/2015), End Date (10/31/2015), Total Units (31), and Place Of Service (99 - Other). A table below the form displays 5 activity records with columns for Activity ID, Consumer, Case No, Start Date, End Date, Amount, Facility, Diagnosis, Claim #, and Apply. The total amount is \$1,696.50.

Activity ID	Consumer	Case No	Start Date	End Date		Facility	Diagnosis	Claim #	Apply
			10/1/2015	10/28/2015	28	\$316.68	53 - Community Mental Health Care	F1120	<input checked="" type="checkbox"/>
			10/1/2015	10/29/2015	29	\$327.99	53 - Community Mental Health Care	F1120	<input checked="" type="checkbox"/>
			10/1/2015	10/31/2015	31	\$350.61	53 - Community Mental Health Care	F1120	<input checked="" type="checkbox"/>
			10/1/2015	10/31/2015	31	\$350.61	53 - Community Mental Health Care	F1120	<input checked="" type="checkbox"/>
			10/1/2015	10/31/2015	31	\$350.61	53 - Community Mental Health Care	F1120	<input checked="" type="checkbox"/>

24. At top of page select Submit Claims

The screenshot shows the 'Batch Claim Entry' form with the 'Submit Claims' menu item in the top navigation bar circled in red. A red arrow points from a box labeled '24' to the 'Submit Claims' menu item. The form fields are the same as in the previous screenshot.

25. Window will display the number of claims successfully posted. Click on the upper right corner Red X to close the window.

26. At top of page Close Batch Claim Entry.

To review the claims, go to the Claims Chapter.