Maryland/DC Online Billing

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Introduction

The online billing system is an Internet based web application that allows service providers to submit invoices electronically. Using the online billing system will help expedite payment of services performed as well as help facilitate accurate submission of billable services. The following instructions should prove to be helpful in learning how to use the online billing system.

I. **Logging into the online billing system** *(Figure A)*
The website address for online billing is http://www.choicesteam.org/marylandonlinebilling. In your web browser configuration, please be sure to enable "pop ups" for the website "services.mdchoices.org". Keep in mind though, that you must use the full web address mentioned at the onset to actually access the application. For best performance, use Microsoft Internet Explorer Version 7 or higher.

II. **Procedure for creating an invoice**
In order to create and submit a valid invoice using the online billing system, please keep in mind the following guidelines:

- Services cannot be invoiced after 60 days from the last day of the service month. For example, all services performed in March must be invoiced before June 1st. If for some reason you must enter an invoice after the 60 day period, you will need to call Choices at (317)726-2121 and ask for the Community Resource Manager for further assistance.

- Services cannot be invoiced until the first day of the next month. For example, the earliest you may submit any invoice for March services is April 1st.

- For any given month, you cannot submit multiple invoices that contain services for the same month. For example, in the month of June, you cannot submit two invoices if they both contain May services.

- Services cannot be entered for dates in which the client is not enrolled.

- Service date cannot be a future date.

A. **Main Menu**
After successfully logging into the online billing system, you will see the "Main Menu" screen (*Figure B)*. From this screen, you will be able to see all of the invoices you have created as well as their submission status. You will be able to create new invoices, access security maintenance, as well as print a list of authorized services that you may bill for.

B. **Entering an authorized service** *(Figure C)*

1. Enter the date in which the service was completed.

2. After the date has been entered, you will be provided with a dropdown list of clients that were authorized to receive services at that date. Select client and the client's ID number will be entered automatically.

3. Select the appropriate service code, provider name, quantity of the units of service, type of units, and unit cost. The line total will be calculated automatically. In the "Memo" field, you may enter any information (your invoice number, reference

number, invoice description, etc.) to allow you to readily be able to identify an invoice on the Main Menu screen.

4. Click the "Add to Invoice" button to add that service to your invoice. If the service has a valid authorization, it will be added. Otherwise, a message box will indicate why the service was not added to the invoice *(Figure D)*. If you determine that a data entry error was not made, you made add the service as a pending service by clicking the "Services Pending Approval" button (Step C).

5. After all of your services have been entered, you may click the "Submit Final Invoice to Choices" button. If the submission is successful, you will be redirected to the Main Menu.

C. **Entering a pending service**

1. When entering a service to be invoiced, at times you may not be able to immediately add that service to your invoice; when this happens, you will need to add the service as "Pending". Under the following situations you will see a message box similar to "Figure D" that will prompt you to enter the service as a "Service Pending Approval":

   - There is no authorization for the service being invoiced.

   - The requested dollar amount or number of units has not been authorized for this service.

2. Click the button "Service Pending Approval". You will be taken to the "Pending Services That Need Coordinator Authorization" screen *(Figure E-1).* In this screen you will be able to create a list of services that you feel should be authorized. Entering services on this screen is similar to adding services on the "Create Invoice" screen. Once you have entered the necessary information, click the "Add to Pending Services for Approval" button. Within the list of items, you have the option of deleting the pending service or requesting that the service be authorized. After clicking the "Request" option, one of two things will happen:

   - The item will disappear; thus indicating that the service has been approved and has been added to your invoice.

     Or

   - A message box will alert you as to why the service cannot be added to the invoice at this time. You may call the care coordinator for your client to expedite the authorization approval.

3. After all pending items have been authorized, click the "Update Items and Return to Invoice" button. This will add the previous pending items to the invoice.

D. **Changing contact information** *(Figure C)*
Before submitting an invoice, make sure that your current contact information is correct. If you would like to change your contact information, click the checkbox "Update Contact Information", make the desired changes, and save the changes by clicking the "Save Contact Information" button.

E. **Saving invoice** *(without submitting)*
By clicking the "Save Invoice & Return to Main Menu" button, you may save your invoice at any time. This includes saving contact information for an invoice. This will allow you to added services as they are completed during the month as opposed to waiting till the end of the month to enter all services. Keep in mind, however, that in order for an invoice to be saved, you must have at least one service entered or one pending service entered. Invoices that are created that do not meet that criteria, are automatically deleted when you return to the Main Menu.

F. **Submitting Final Invoice to Choices**

1. After ALL services have been entered (either as invoice items OR pending items), you may submit your invoice by clicking the "Submit Final Invoice to Choices" button. BEFORE clicking this button, keep the following in mind:

   - You will not be able to add any NEW services to this invoice after you have attempted a submission. The only services that can be added are services ALREADY entered as pending.

   - You will not be able to add any NEW pending services. Only pending services that are already on the list can be added.

   - Only after ALL pending services have either been deleted or approved will the invoice be entered into the Choices billing system; if there are still pending services in the list, the submission date will reflect the date that you ATTEMPTED to submit your invoice. In this way, processing your invoice will not be delayed based up pending items; HOWEVER, in order for your invoice to be processed, you must still continue to submit the invoice until it is closed (all pending items are gone and invoice items are submitted).

2. After your invoice has been successfully submitted, the system will automatically notify Choices' personnel that your invoice has been completed. Also, you will only be able to view and print your invoice after a successful submission.

G. **Managing Pending Items AFTER Invoice Submission**

If you submit an invoice and there are pending items on the invoice, you will see a new button on the "Pending Services" screen *(Figure E-2)* labeled "Request Authorizations for All Pending Services". Clicking this button does a "batch" request for all pending services. If there are still pending items after clicking this button, you will receive the message illustrated in "Figure E-3". In addition, an email will automatically be generated by the system to notify the appropriate care coordinator of the authorization request for all pending services. ONLY AFTER an invoice submission has been initiated, will an email indicating an authorization issue by generated by the system.

III. **Printing invoice**

You may print an invoice at any time by clicking the "Print" button on the "Create Invoice" screen. After an invoice has been successfully submitted and closed, you may print an invoice by going to the "View Invoice" screen *(Figure F).* You are automatically redirected to this screen from the Main Menu, when you chose to open an invoice that has already been submitted.

IV. **Printing authorization report**

On the Main Menu screen, you may print a list of all authorized services for a given d ate range. This report *(Figure G)* will show you the client name, client ID number, service codes and descriptions, authorization date range, and other helpful information.

V. **Security Management**

On the "Security Management" screen *(Figure H)* you can change your password for your VENDOR login ID as well as setup Sub-Providers (such as mentors) to have limited access to the system.

A. *Changing vendor password*

Under the left column of the screen, you will find your vendor ID number which is the same as your login ID for the online billing system. While your login ID is fixed, you can change your password. In order to change your password, simply enter your new password on the appropriate field and repeat entering your password in the space provided directly up under your new password. Both entries must be identical. Also, passwords must be exactly 8 characters long, contain at least one numeric character, one capital letter, and one lowercase letter.

B. *Managing Sub-Provider access*

In order for your sub-providers to have access to the online billing system, you must add login IDs for sub-providers that ALREADY exist in the dropdown list. If you need a login ID for a sub-provider that is not in the list, you may contact Choices at (317)726-2121 and ask for the Community Resource Manager to have the desired sub-provider added to the list; after which, you will need to add a login ID for that sub-provider. To add a login ID, simply:

1. Select the appropriate sub-provider.
2. ASSIGN a password with the same procedure mentioned above under "Change vendor password" but perform the steps in the right column.
3. Click the "Add LoginID" button.

You may also delete login IDs (thus requiring re-adding the login) or you may temporarily disable login IDs.

Keep in mind the following in regards to user access:

- Only by logging into the online billing system with the vendor ID will you be able to add invoices, submit invoices, print authorization reports, and manage security access. For this reason, do not share your Vendor ID and password with anyone not authorized by you to perform these functions.

- Sub-providers must select an already existing invoice to add their service entries, so the invoice must have already been created by the Vendor login.

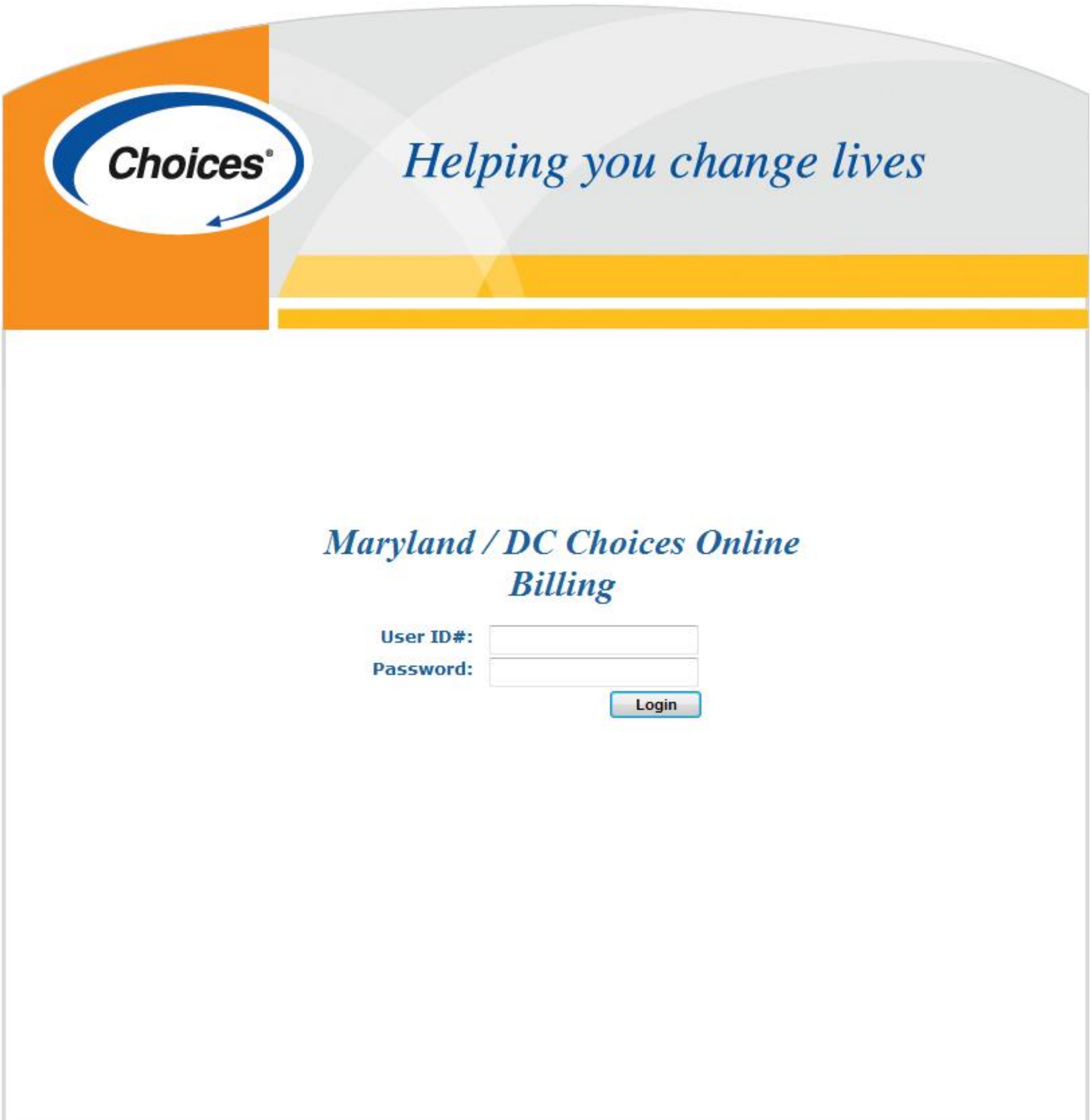
- After opening an invoice, sub-providers will only be able to add services (approved or pending) up under their name. They will only be able to view services (as well as dollar totals) that they enter. After a final submission of an invoice, sub-providers will not have access to the invoice at all.

VI. **Reporting Problems**

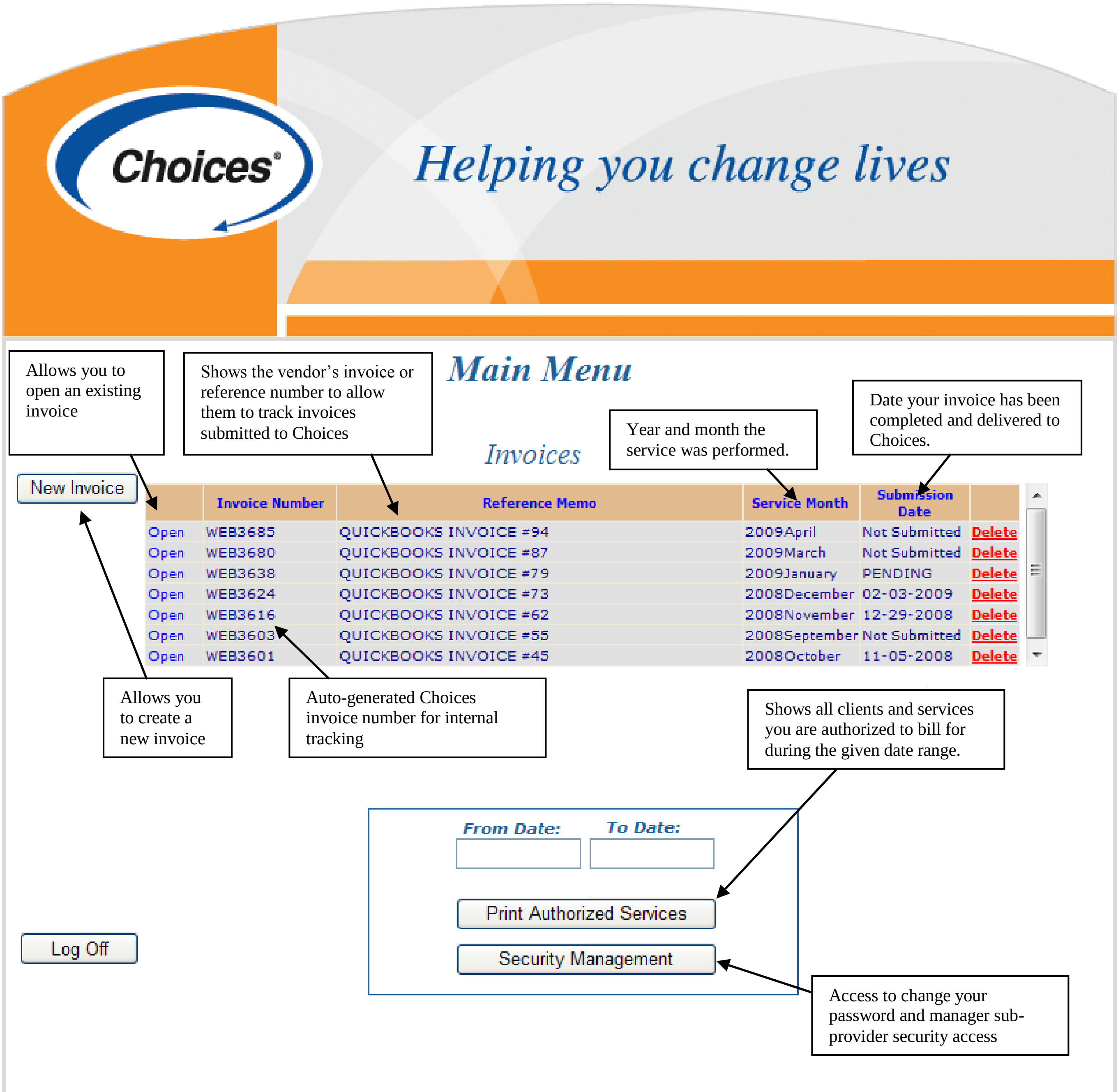
If you experience technical difficulties such as unexplained error messages, or if you need help setting up your web browser to be able to use the online billing system, please send an email to onlinebilling@choicesteam.org . Be sure to include your vendor ID number; or, you may contact Choices at (317)726-2121 and ask for online billing system support.

Diagrams

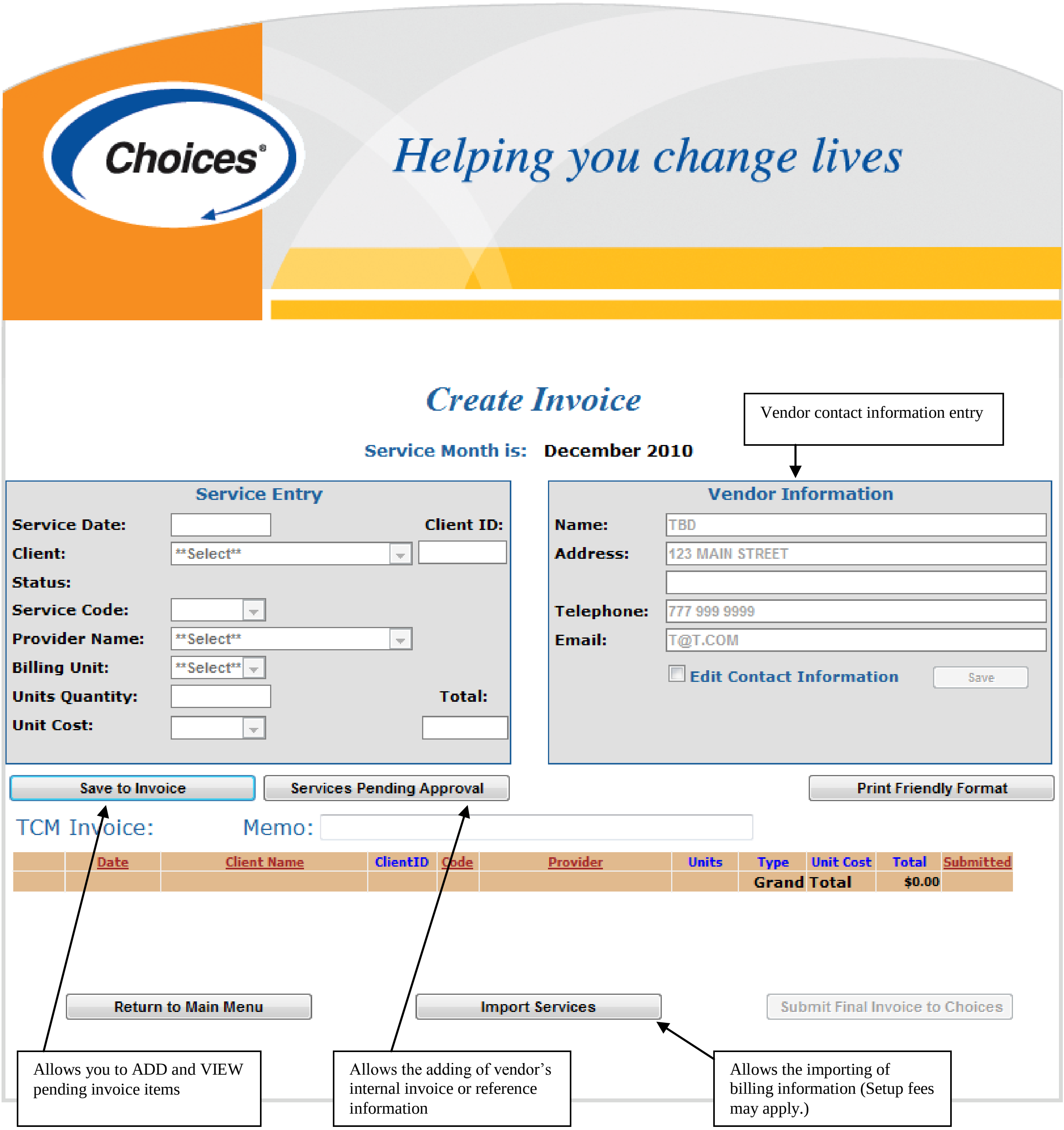
Login Screen *(Figure A)*



Main Menu Screen *(Figure B)*

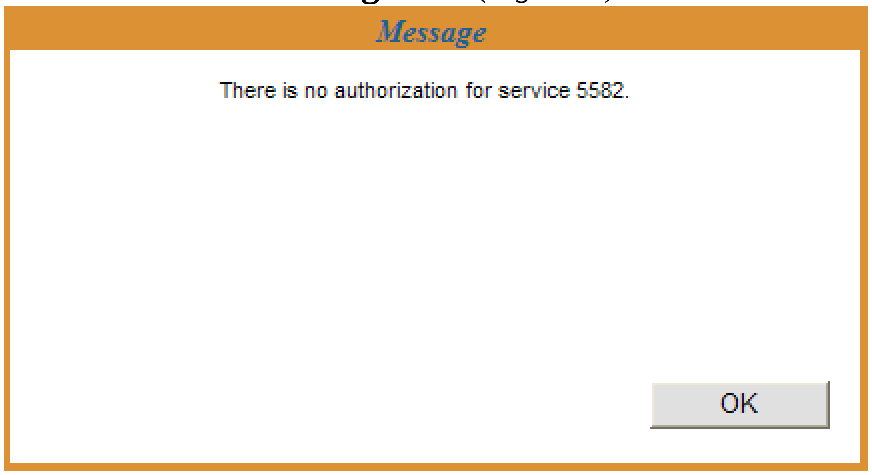


Create Invoice Screen *(Figure C)*

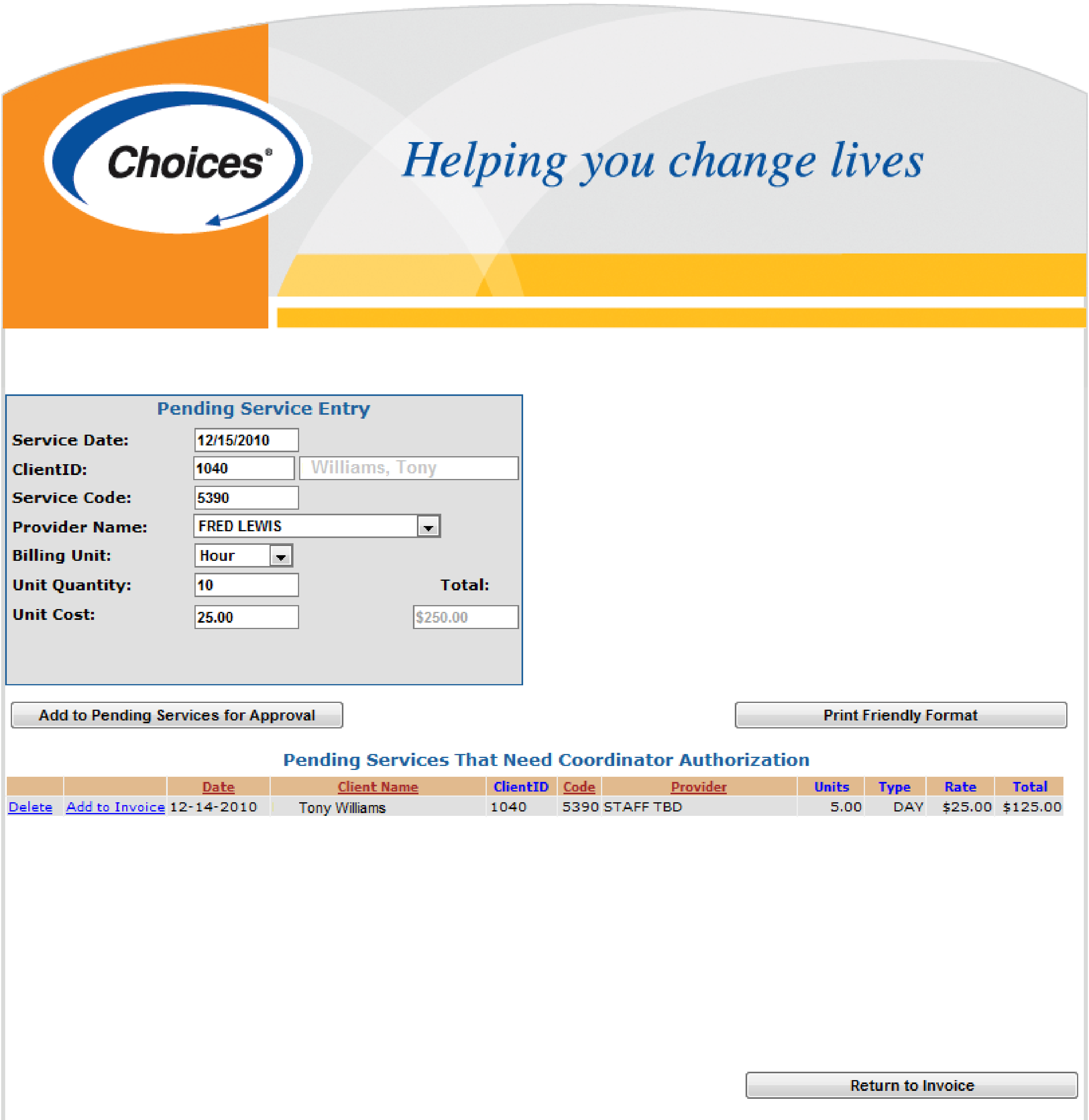


Note: You can sort by date, client name, service code, provider name, or submitted status by clicking on the heading titles. The sort enabled columns have a brown color to the heading text.

Message Box *(Figure D)*



Pending Services Screen *(Figure E-1)*



Note: You can sort by date, client name, service code, provider name, or submitted status by clicking on the heading titles. The sort enabled columns have a brown color to the heading text.

Pending Services Screen *(After Invoice Submission) (Figure E-2)*

Choices®

Helping you change lives

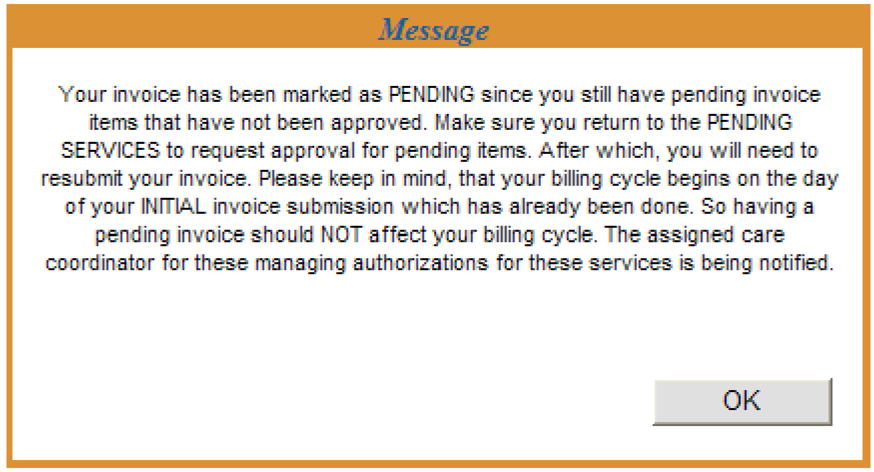
Request Authorizations for ALL pending services | Print Friendly Format

Pending Services That Need Coordinator Authorization

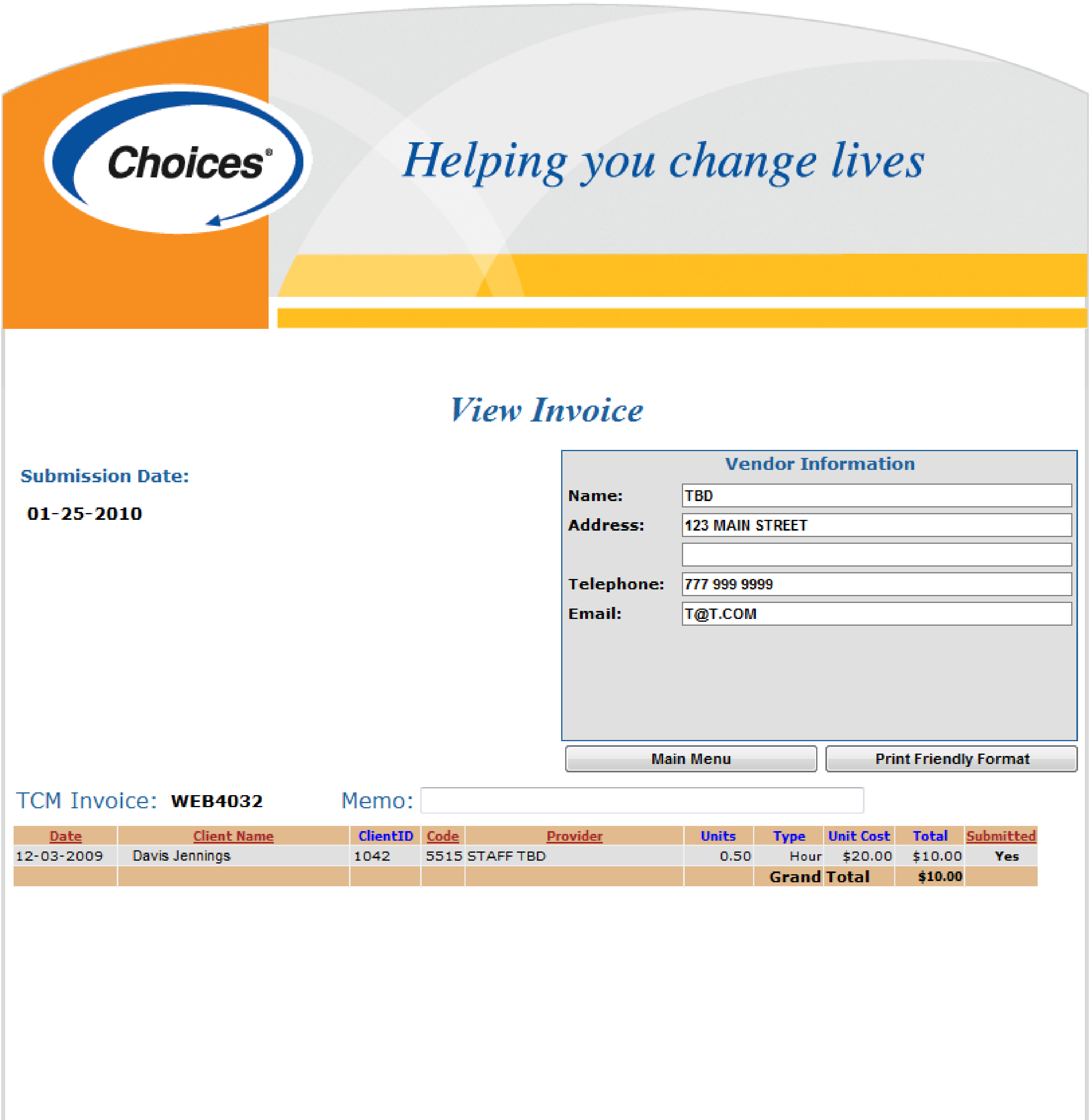
		Date	Client Name	ClientID	Code	Provider	Units	Type	Rate	Total
Delete	Add to Invoice	12-14-2010	Tony Williams	1040	5390	STAFF TBD	5.00	DAY	$25.00	$125.00

Return to Invoice

(Figure E-3)


Message
Your invoice has been marked as PENDING since you still have pending invoice items that have not been approved. Make sure you return to the PENDING SERVICES to request approval for pending items. After which, you will need to resubmit your invoice. Please keep in mind, that your billing cycle begins on the day of your INITIAL invoice submission which has already been done. So having a pending invoice should NOT affect your billing cycle. The assigned care coordinator for these managing authorizations for these services is being notified.
OK

View Invoice Screen *(Figure F)*



Choices®

Helping you change lives

View Invoice

Submission Date:

01-25-2010

Vendor Information

Name:	TBD
Address:	123 MAIN STREET
Telephone:	777 999 9999
Email:	T@T.COM

Main Menu | Print Friendly Format

TCM Invoice: **WEB4032** Memo:

Date	Client Name	ClientID	Code	Provider	Units	Type	Unit Cost	Total	Submitted
12-03-2009	Davis Jennings	1042	5515	STAFF TBD	0.50	Hour	$20.00	$10.00	Yes
						Grand Total		**$10.00**	

Note: You can sort by date, client name, service code, provider name, or submitted status by clicking on the heading titles. The sort enabled columns have a brown color to the heading text.

Authorization Report

PrintAuthorizations - Microsoft Internet Explorer provided by Choices, Inc.

https://services.choicesteam.org:444/PrintAuthorizations.aspx

Authorized Services/Interventions

Date Printed: 12/5/2007

From: 10/1/2007 to 10/31/2007

5100 - Therapy - Individual

Client Name	Provider	Date Range	Units	Rate	Total	Funding
JACKSON, TERRY	SMITH, DIANE	10-01-2007 - 10-31-2007	5.00	$65.00	$325.00	Choices
LEWIS, JERRY	SMITH, DIANE	10-01-2007 - 10-31-2007	5.00	$65.00	$325.00	Choices
JONES, JESSE	SMITH, DIANE	10-01-2007 - 10-31-2007	12.00	$65.00	$780.00	Choices
FLETCHER, SAMANTHA	SMITH, DIANE	10-01-2007 - 10-31-2007	2.00	$65.00	$130.00	Choices
COOK, BRIAN	SMITH, DIANE	10-01-2007 - 10-31-2007	1.00	$65.00	$65.00	Choices
SMITH, LEWIS	SMITH, DIANE	10-01-2007 - 10-31-2007	8.00	$65.00	$520.00	Choices

Subtotal: $2,145.00

5110 - Therapy - Family

Client Name	Provider	Date Range	Units	Rate	Total	Funding
JACKSON, TERRY	SMITH, DIANE	10-01-2007 - 10-31-2007	18.00	$65.00	$1,170.00	Choices
LEWIS, JERRY	SMITH, DIANE	10-01-2007 - 10-31-2007	15.00	$65.00	$975.00	Choices
JONES, JESSE	SMITH, DIANE	10-01-2007 - 10-31-2007	2.00	$65.00	$130.00	Choices
FLETCHER, SAMANTHA	SMITH, DIANE	10-01-2007 - 10-31-2007	30.00	$65.00	$1,950.00	Choices
COOK, BRIAN	SMITH, DIANE	10-01-2007 - 10-31-2007	28.00	$65.00	$1,820.00	Choices

Subtotal: $6,045.00

5515 - Team Meeting

Client Name	Provider	Date Range	Units	Rate	Total	Funding
BROWN, TONY	SMITH, DIANE	10-25-2007 - 10-31-2007	5.00	$48.50	$242.50	Choices
JACKSON, TERRY	SMITH, DIANE	10-01-2007 - 10-31-2007	4.00	$48.50	$194.00	Choices
LEWIS, JERRY	SMITH, DIANE	10-01-2007 - 10-31-2007	1.00	$48.50	$48.50	Choices
JONES, JESSE	SMITH, DIANE	10-01-2007 - 10-31-2007	1.50	$48.50	$72.75	Choices
FLETCHER, SAMANTHA	SMITH, DIANE	10-01-2007 - 10-31-2007	1.50	$48.50	$72.75	Choices
COOK, BRIAN	SMITH, DIANE	10-01-2007 - 10-31-2007	2.00	$48.50	$97.00	Choices
SMITH, LEWIS	SMITH, DIANE	10-01-2007 - 10-31-2007	1.50	$48.50	$72.75	Choices

Subtotal: $800.25

Grand Total: $8,990.25

Done | Internet | 90%

(Figure G)

Security Maintenance *(Figure H)*