



Care Director Provider Portal Training Manual

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Provider Portal

The Provider Portal is designed to allow providers to access and send information, related to only their active clients to COA. From the portal, providers are able to view and, in some instances, add or edit the information. The information available to provider includes:

- Announcements, Contact Information and FAQs
- Accept request for Services
- Service Authorizations
- Details related to provider and the provider contracted services
- Billing and payment information.

In order to access the portal the COA Provider Staff will send you an email with login information.

Provider Website

COA Council on Aging

HOME ABOUT FAQ CONTACT ANNOUNCEMENTS

Welcome to the Resource Management Portal

Provider Registration

If you are a provider and would like to be listed in the online directory, please read our Provider [Frequently Asked Questions](#) for more information about the process and requirements for provider updates.

Provider Login

E-mail

Password

[Forgot Password](#)

LOGIN

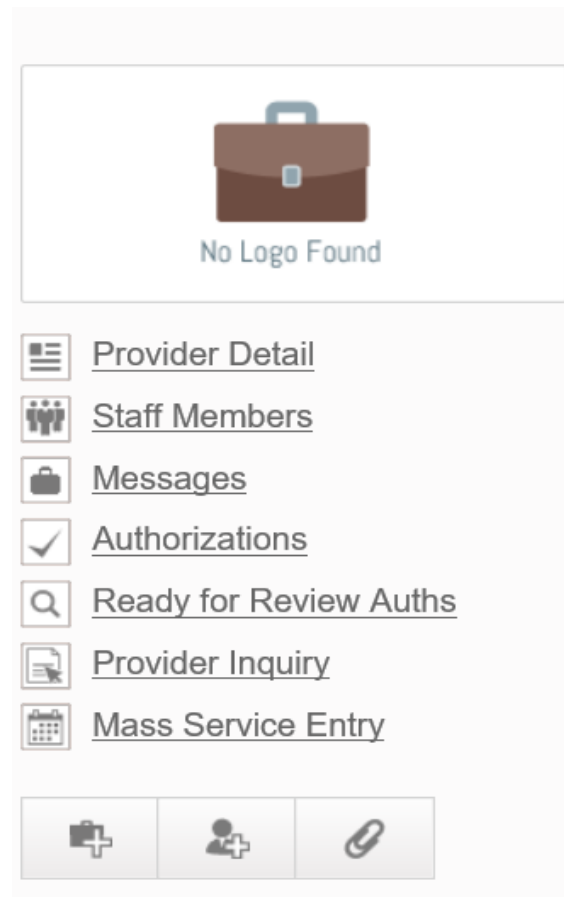
FEEDBACK

Prior to logging into the portal, the user will be able to view the following:

- Information regarding COA under the **About** tab.
- **FAQs** include information related to creating an account or reset password, it can also contain information related to specific department or activities such as finance of provider services.
- Providers are able to send a general message or inquiry using the **Contact** tab.
- **Announcements** are used to publish information out to everyone.

Provider Homepage

Once the Provider staff has logged in they will arrive at the provider homepage.



Provider Details

Provider Details include general details and address information related to the provider. The provider will be able to make updates in this section.



Provider Detail: Mr Clean Jeans Cleaning Service

Provider Detail
Staff Members
Phone Numbers
Provider AKAs
Provider Services
Service Authorizations
Business Hours
Incident Reports
Licenses or Accreditations
Appeals/Grievances
Counties Served
Languages
Messages
Case Notes

General Details

Name of Business*	E-mail Address
<input type="text" value="Mr Clean Jeans Cleaning Service"/>	<input type="text"/>
FEIN	Web Site
<input type="text" value="757539393"/>	<input type="text"/>

Physical Address

Address Type	City
<input type="text" value="Business"/>	<input type="text" value="Clevs"/>
Address Name	State
<input type="text" value="Mr Clean Jeans"/>	<input type="text" value="OH"/>
Address Line 1	Zip Code
<input type="text" value="847 Clean Jeans Way"/>	<input type="text" value="45002"/>
Address Line 2	
<input type="text"/>	

Mailing Address

Address Type	City
<input type="text" value="Business"/>	<input type="text" value="Clevs"/>
Address Name	State
<input type="text" value="Mr Clean Jeans"/>	<input type="text" value="OH"/>
Line 1	Zip Code
<input type="text" value="847 Clean Jeans Way"/>	<input type="text" value="45002"/>
Line 2	
<input type="text"/>	

UPDATE

FEEDBACK

Staff Members

The user can access staff member from the Provider Home Page and under Provider Details

Staff Members - the provider can view, and search staff who can access the portal. The information can also be exported to Excel.



Staff Members

My Active Records

Provider Detail
Staff Members
Phone Numbers
Provider Services

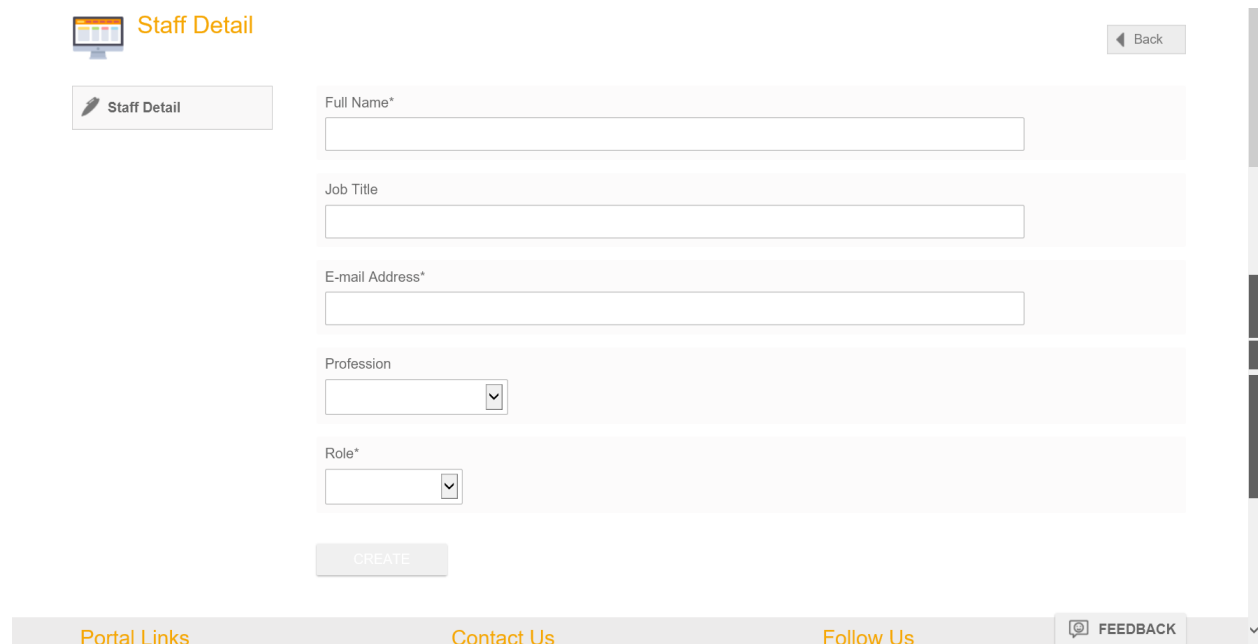
<div> New Export to Excel </div>					
View: <input type="text" value="My Active Records"/>		All			
<input type="checkbox"/> Select all	Full Name	Job Title	Role	Created On	
<input type="checkbox"/>	Andy Patton 2		Main Contact	8/16/2018	
<input type="checkbox"/>	April Bauer		Billing Staff	7/16/2018	

Update Staff Information

To update a staff member, click on [+ New](#) and the following webpage will be displayed. The following information is required:

- Full Name
- Email Address
- Role

Once the information has been entered the user will click on “Update” at the bottom of the form.



The screenshot shows a web application interface for updating staff information. At the top left, there is a 'Staff Detail' header with a small icon. To the right of the header is a 'Back' button. Below the header is a 'Staff Detail' sidebar with a pencil icon. The main form area contains five input fields: 'Full Name*' (text), 'Job Title' (text), 'E-mail Address*' (text), 'Profession' (dropdown), and 'Role*' (dropdown). At the bottom of the form is a 'CREATE' button. The footer of the page contains four links: 'Portal Links', 'Contact Us', 'Follow Us', and a 'FEEDBACK' button with a speech bubble icon.

Phone Numbers

Phone Numbers - the provider can add, view, and search phone numbers associated to the provider. The information can also be exported to Excel.


Adding a Phone Number

To add a phone number the user clicks on [+ New](#) from the Phone list view,

and the system will display the Phone Number screen, the user is required to enter at least the Phone number and click on create. To return to the Provider detail page they will just click on the “Back” button in the upper right.

Provider Phone Number

 Back

 Provider Phone Number

Phone Numbers

Phone Number*

Type

Extension

Description

Reason Withheld

Function

Confidential

☐ Yes ☐ No

Toll Free


☐ Yes ☐ No

CREATE

Provider AKAs

This allows COA to capture other names the provider may be known as, the Providers legal entity should ALWAYS be the name listed in the Provider Details. From the Provider AKA, the provider can add, view, search, and activate AKAs associated to the provider. The information can also be exported to Excel.

Adding a Provider AKA

To add a Provider AKA in the portal the user would click on  New and enter the AKA name on the Provider AKA screen and click on Create. Once the AKA has been created click on “Back” to return to the Provider AKA main view.

Provider AKAs

 Provider AKAs

AKA*

Confidential

☐ Yes ☐ No

Description

CREATE

Provider Services

The Provider Services area allows Providers to see the services they are contracted to deliver. Providers can select a service and view details related to the service including the service authorizations and rates associated with the service. The list can also be exported to Excel.

The screenshot shows the 'Provider Services' page. At the top, there are navigation links: HOME, ABOUT, FAQ, CONTACT, and ANNOUNCEMENTS. Below these is a sidebar with a list of links: Provider Detail, Staff Members, Phone Numbers, Provider AKAs, Provider Services (highlighted), Service Authorizations, Business Hours, Incident Reports, and Licenses or Accreditations. The main content area has a header 'Provider Services' and a sub-header 'Provider Services'. Below this is a table with columns: Name, Start Date, End Date, and a search icon. The table contains two rows of data for 'Mr Clean Jeans Cleaning Service, Hoarding remediation, S5120'. A 'Mr Clean...' hyperlink is visible in the first row. Above the table is a search bar and a 'View: Provider Services' dropdown. At the bottom right, there is a 'FEEDBACK' button.

By hovering over the [Blue](#) hyperlink, you are able to see the service, and by clicking that link the details related to the Provider Service including the start date of the service, and the Rates and Service Authorizations attached to the Provider Service.

The screenshot shows the 'Provider Services: Mr Clean Jeans Cleaning Service, Hoarding remediation, S5120' page. The page has a 'Back' button at the top right. On the left, there is a sidebar with links: Provider Services, Service Authorizations (highlighted), and Provider Service Rates. The main content area has a form with fields for Name*, Start Date*, End Date, and Rates Determined By* (Building). Below the form is a 'Service Authorizations' section with a sub-header 'Open Service Authorizations'. This section has a 'Back' button and a table with columns: Select all, Authorization Id, First Name, Last Name, Service, Status, and Start Date. The table contains two rows of data for 'Mr Clean Jeans Cleaning Service, Hoarding remediation, S5120'. A 'Mr Clean...' hyperlink is visible in the first row.

The provider can also view the rates attached to the service, by selecting Provider Services rates and then click on the [Blue](#) hyperlink, which opens the Provider rates screen. On the provider rate screen you can see detail regarding the Start date of the rate, if the rate is a person, building or zone rate and for who or where and the unit of measure attached to the rate.

Provider Service Rates
 Provider Service Rates

Provider Services

Service Authorizations

Provider Service Rates

+ New

Export to Excel

View: Provider Service Rates

All

Select all	Type	Service Code	Provider Service	Person	Unit of Measure	Rate	Start Date
<input type="checkbox"/>	Standard	Home Care As...			15 min.	\$5.00	1/1/2018
<input type="checkbox"/>	Standard	Home Care As...			15 min.	\$5.00	1/1/2018

Provider Service Rate: Home Care Assistance (15 Min.),5.00

Provider Service Rate

Date the rate begins*

1/1/2018

End date of the rate

Rate*

\$5.00

Unit Of Measure*

15 min.

Person

Building*

Zone*

BC CENTRAL

Service Authorization

Providers can select Service Authorization under Provider Detail or from the Provider Homepage under Authorizations. Providers can sort and view service authorizations, by status, can select and open the authorizations, see service transactions that have been submitted, invoiced or cancelled against the authorization, or print the service authorization or export a list to Excel. Providers can view services authorization in the following statuses:

- **Authorized Service Authorizations** - this will show all authorizations that have been authorized, even after the end date of the authorization for up to 6 months.
- **Cancelled Service Authorizations** - shows all authorizations that have been cancelled, for any of the following:
 - The provider failed to respond within the required timeframe.
 - The provider declined the request made on an authorization.
 - The person chose another provider to deliver the service.
- **Open Service Authorizations** - these are service authorizations for people currently getting services from the provider.
- **Ready for Authorization Authorizations** - this provides a listing of the authorizations you have accepted.
- **Terminated Service Authorizations** - this provides a listing of the authorizations have been terminated for whatever reason.

Council on Aging

HOME

ABOUT

FAQ

CONTACT

ANNOUNCEMENTS

Service Authorizations
 Open Service Authorizations

Provider Detail

Staff Members

Phone Numbers

Provider Services

Service Authorizations

Export to Excel

Authorization for Services

View:

Authorized Service Authorizations

Cancelled Service Authorizations

Open Service Authorizations

Ready for Authorization Authorizations

Terminated Service Authorizations

Select all	Service Code	First Name	Last Name	Service	Status	Start Date
<input type="checkbox"/>	85	P		Home Care Assistanc...	Authoriz...	8/5
<input type="checkbox"/>	13	Je		Home Care Assistanc...	Authoriz...	8/5
<input type="checkbox"/>	14	L		Home Care Assistanc...	Authoriz...	8/5

Created by COA Provider Services (source materials taken from Care Director)

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Providers can click on the [Blue](#) hyperlink to open an individual service authorization to view details that include the following:

- Person name and Date of Birth
- Service to be delivered
- Funder
- Status of the Authorization
- Start and End Date of Authorization, if the authorization has been terminated it will display the last date services can be billed for
- Unit of Measure
- Frequency the Units are to be delivered on
- Total # of units available for the timespan of the authorization
- Rate per unit
- Total cost of the authorization
- HCPCs and Modifiers needed for billing
- Notes



Service Authorizations: Jackie Roberson, 07/30/39, Madden Providers, Home Care Assistance (15 Min.), 09 Aug 2018

[Back](#)

Service Authorizations

General

Member*	Jackie Roberson, 07/30/39
Provider	Madden Providers
Service*	Madden Providers, Home Care Assistance (15 Min.)
Funder*	Jackie Roberson, Hamilton County ESP
Status*	Authorized
Start Date*	8/9/2018
End Date*	12/31/2018
Termination Date	
Date Added*	4/1/2018
Authorization Amended?	<input type="radio"/> Yes <input checked="" type="radio"/> No

Units

Unit Of Measure*	15 min.
Frequency*	Weekly (EndD - StartD) / 7 x U x R
Total units*	168
Rate per unit	\$5.0000
Total Cost*	\$840.0000

Finance

HCPCS	T1019
Modifier 1	
Modifier 2	
Modifier 3	
Modifier 4	
Billable	<input checked="" type="radio"/> Yes <input type="radio"/> No

Other

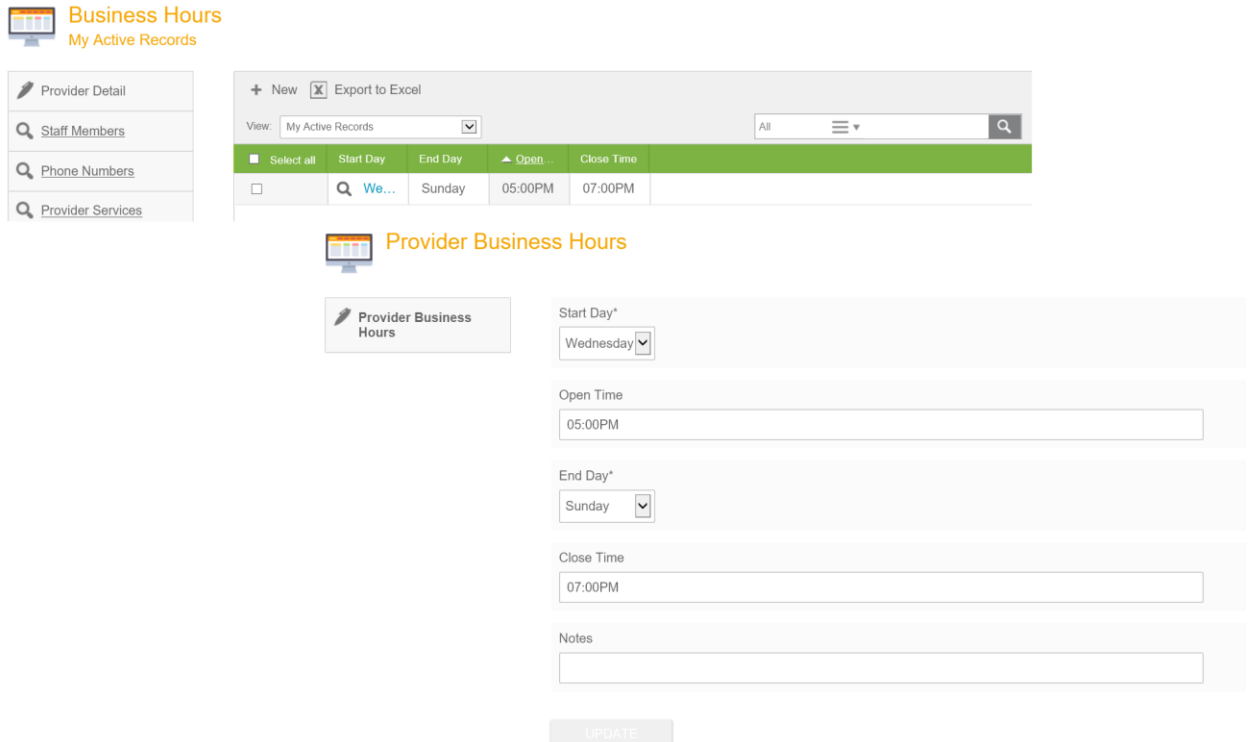
Authorized By	Level of Need
April Bauer	
Authorized On	Site
8/13/2018	
Notes	

Business Hours

If the Provider chooses, they can add, view, and search hours of business associated to the provider. The information can also be exported to Excel.

Adding Business Hours

If the provider decides to add business hours they can click on **+ New** and enter the start and end time including Am and PM and days of the week. Once finished entering information click on “Create”



Business Hours
My Active Records

Provider Detail
Staff Members
Phone Numbers
Provider Services

+ New Export to Excel

View: My Active Records All

Select all	Start Day	End Day	Open...	Close Time
<input type="checkbox"/>	Q We...	Sunday	05:00PM	07:00PM

Provider Business Hours

Provider Business Hours

Start Day*
Wednesday

Open Time
05:00PM

End Day*
Sunday

Close Time
07:00PM

Notes

UPDATE

Incident Reports

This feature will be available on a later date.

Counties Served

Counties Served is a listing of the counties in which the provider is contracted to deliver services.

Counties Served

Active Counties Served

Provider Detail
Staff Members
Phone Numbers
Provider AKAs
Provider Services

+ New x Deactivate ⏻ Activate x Export to Excel			
View: Active Counties Served			
All			
<input type="checkbox"/> Select all	County	Created On	
<input type="checkbox"/>	Hamilton	07/05/2018	

Languages

If the Provider chooses, they can view, search, and activate hours of business associated to the provider. The information can also be exported to Excel.

Adding Languages

If the provider decides to select languages they can click on the [+ New](#) and enter the languages provider has the ability to serve from the dropdown box. Once finished entering information click on “Create”

Messaging

Messages are used to communicate between the provider and COA. Messaging keeps a chain of the conversation between the provider staff and COA staff related to the message. Messages can also be exported to Excel

Messages can be accessed from either the Provider Homepage or under Provider Detail.

Messages

New Messages

Provider Detail
Staff Members
Phone Numbers
Provider AKAs
Provider Services
Service Authorizations

+ N x Export to Excel					
View: All					
<div> All Messages Closed Messages Messages Read New Messages Responded Messages (Read) Responded Messages (Unread) </div>					
<input type="checkbox"/> S		Updated By	Date	Regarding	Owner
<input type="checkbox"/>	Billing issues with DB	e service	8/14/2018...	Mr Clean Jean...	e service

From the view you can select to see the following:

- **All Messages** - All messages exchanged
- **Closed Messages** - Messages that all no longer active

- **Messages Read** - Messages that have been read
- **New Messages** - New messages that have been sent to you
- **Responded Messages (Read)** - Messages that have responses and that the responses have been read
- **Responded Messages (Unread)** - Messages with responses that have not been read


New Messages


To create a message, click **+ New**. Select “Provider” in category field, enter a subject, enter Attention to, and then type your message into Message window. Once finished entering information click on “Create”


The screenshot shows a web application interface for creating a new message. At the top is a navigation bar with links: HOME, ABOUT, FAQ, CONTACT, and ANNOUNCEMENTS. Below the navigation bar is a header section with a 'Messages' icon and the title 'Messages'. A 'Back' button is located in the top right corner of the form area. The form itself is divided into several sections:

- Category***: A dropdown menu with 'Provider' selected.
- Subject***: A text input field containing the text 'Testing'.
- Mark as Read**: Radio buttons for 'Yes' and 'No'.
- Person***: A dropdown menu with a person icon.
- Attention to**: A dropdown menu.
- Message**: A large text area containing the text 'Testing messages in the system'.
- Message History**: A large, empty text area.


 At the bottom right of the form, there is a 'FEEDBACK' button.

 Messages



 Messages

Category

Provider 

Subject*

Billing issues with DB

Mark as Read

☐ Yes ☐ No

Message

We are looking to issue a credit related to billing on DB

Message History

CREATE

Messaging History

The Message History can be viewed by opening the message and reading the information in the Message History section of the message. If you need to respond to the message you can respond by entering the information in the Message section and click on Update at the bottom of the screen.

From Message History you are able to see the complete conversation regarding the issue.



Messages: Billing issues with DB

◀ Back

 Messages

Category

Provider



Subject*

Billing issues with DB

Mark as Read

☒ Yes ☐ No

Message

Message History

=====

From: e service

Sent: 14/08/2018 07:10

Subject: Billing issues with DB

Please let us know the exact dates you will be crediting

=====

=====

From: abauer@caaredirector.us

Sent: 14/08/2018 07:10

Subject: Billing issues with DB

We are looking to issue a credit related to billing on DB

=====


=====

UPDATE

Case Notes

Case Notes were designed to let the provider enter a related to a specific Person. To create a Case Note, select Case Notes under Provider Details. You will need to enter the following required fields:

- **Title** - the is a brief description of the issue
- **Person** - select the person the case note is regarding.
- **Message** - the information you want to document on the person.
- **Category** - the category of the case note.
- **Subcategory** - the subcategory of the case note.

Once you have completed the note click on , and the note will be saved on the person's record.



Case Note

[◀ Back](#)

Case Note

Title*

Person*

Message

Category

Sub-category

CREATE

Ready for Review Authorization

The Ready for Review Authorization screen allows the provider to review, enter a cost per unit if the service is a bid service, add notes and accept or decline a request for services.

The following information will be present in the comment section for referrals sent to the providers:

HCA RFS

Schedule: Start date, List preferred day, number of units, preferred time of day

Tasks: General cleaning, laundry, grocery shopping, PC, running errands, provide respite time for CG Smoker/Non-Smoker

Pets

Contact: List who provider should contact to setup service

(e.g. Clt is need of 2 units of HCA service per week to assist with general cleaning starting MM/DD/YYYY. Clt is requesting HCA service on Tuesdays late mornings. Clt is non-smoker and does not have any pets. Please contact clt directly to setup service. Please let me know if you have any questions. Thanks, CC's Name, 592-2800)

HDM RFS

Schedule: Start date, list preferred day, number of units per week

Regular/Therapeutic meals (if therapeutic meals are required RX will need to be obtained)

Contact: List who provider should contact to setup service

(e.g. Clt is need of 5 HDMs per week. Clt is requesting to receive HDMs on Tuesdays. Please contact clt directly to setup service. Please let me know if you have any questions. Thanks, CC's Name, 592-2800)

MT/NMT RFS

Schedule: Start date, monthly schedule include number of units clt is approved to receive per month

Specific needs: Clt needs to be transported by wheelchair. Clt will have escort to/from MD appointments. Clt needs hands on assistance with transferring 02 tank and walker in/out of vehicle

Contact: List who provider should contact to setup service

(e.g. Clt is in need of 4 units of MT per month. Clt needs assistance with transferring self and 02 tank in/out of vehicle. Please contact clt's dtr in order to setup service. Thanks, CC's Name, 592-2800)

DME RFS

Description of item: RTS with arms and include if item needs to be installed

Clt's weight and height: 192 lbs. and is 5'9"

Contact: List who provider should contact to setup service

Installation required: Yes/No

RX required: Yes/No

(e.g. Clt is in need of RTS with arms installed. Clt is approximately 192 lbs. and is 5'9". Please contact clt's son to setup delivery. Thanks, CC's Name, 592-2800)

ILA RFS

Schedule: Start date, List preferred day, number units per month, preferred time of day

Tasks: Reading mail, paying bills, setting up MD appointments

Smoker/Non-Smoker

Pets

Contact: List who provider should contact to setup service

(e.g. Clt is need of 4 units of ILA service per month to assist with reading mail, paying bills, and setting up MD appointments. Clt is requesting HCA service on Tuesdays late mornings. Clt is non-smoker and does not have any pets. Please contact clt's dtr (Pam 555-1212) to setup service. Please let me know if you have any questions. Thanks, CC's Name, 592-2800)

ADS Direct Award

Schedule: Start date, preferred weekly schedule

Transportation/No transportation

Enhanced or Intensive

Contact: List who provider should contact to setup service

(e.g. Clt and clt's family is in need of enhanced AD service 3x per week. Clt's dtr is requesting AD service on M, W, F. Transportation to/from is required. Please contact clt's dtr to setup service. Thanks, CC's Name, 592-2800)

*****Clt's family will need to select an AD facility. CCS will need to contact AD facility prior to creating a direct award to check facilities availability on requested days.***

EMS Direct Award

Type of pendant: Necklace/Wrist

Type of phone line: Cable/Land line/Cell phone

Lock box required: Yes/No

Contact: List who provider should contact to setup service

(e.g. Clt is in need of a necklace pendant. Clt has a land line. Clt is requesting a lock box to be installed. Please contact clt's dtr Joanna (555-1212) to schedule a time to install equipment. Thanks, CC's name, 592-2800.)

ALZHE Direct Award

Contact: List who should be contacted to schedule consultation

(e.g. Clt and clt's family is in need of consultation to provide education on the progression of the disease and begin discussion on long term care options. Please contact clt's spouse Bob to schedule consultation. Thanks, CC's name, 592-2800)

Review Ready for Authorization

[Back](#)

Mackenzie TESTFTH, DOB: 12 Aug 1935, [REDACTED] Home Care Assistance (15 Min.), Monday, August 13, 2018

First Name:	Mackenzie	Service:	[REDACTED] Home Care Assistance (15 Min.)
Lastname:	TESTFTH	Start Date:	08/13/2018
Date of Birth:	08/13/1935	End Date:	08/31/2019
Language:		Frequency:	Weekly
Address Line 1:		Units per Frequency:	16.00
Address Line 2:		Total Units:	880
City:	Cincinnati	Cost Per Unit:	5.00
State:	OH	Total Cost:	4400.00
Phone Number:		Notes to Provider:	4 hours weekly
Building:	Not in a Senior Building	Provider Notes:	
Zone:			

[< PREVIOUS](#) Item 1 of 1 [NEXT >](#)

[✓ ACCEPT](#) [✗ REJECT](#)

The Ready for Authorization screen gives the provider the following information related to the request:

- Person's Name
- Person's Date of Birth
- Person's Address
- In the person is living in a specific "Building" or "Zone"
- Service to be provided
- Start and End date of the service period
- The frequency the service will be provided and the number of units per frequency
- Total number of units to be provided during the timespan specified
- Cost per Unit
- Total cost of the service for the timespan specified
- Any notes to the Provider

Once you click the "Accept" button the next authorization to be reviewed will be displayed. When all authorizations have been reviewed you will see screen below.

Review Ready for Authorization

[Back](#)

There are currently no authorizations awaiting review

[< PREVIOUS](#) [NEXT >](#)

[✓ ACCEPT](#) [✗ REJECT](#)

If you want to see all authorizations, click on the "Back" button and select Service Authorizations. Change the "View" to Ready for Authorization.

Service Authorizations

Ready for Authorization Authorizations

Provider Detail

Staff Members

Phone Numbers

Provider AKAs

Provider Services

Service Authorizations

Export to Excel

Authorization for Services

View: Ready for Authorization Authorization

All

Select all	Authorization...	Service	Status	Start Date	End Date
<input type="checkbox"/>	<input type="text" value="26996"/>	Mr Clean Jeans Cleaning Service, H...	Ready for Authorization	1/1/2018	8/31/2018

If you fail to respond to the Ready for Authorizations in a timely manner the authorizations will be cancelled due to failure to respond and they will be reviewable under the Cancelled authorization view.

Provider Inquiry

The screen was designed to give you a view into your billing, invoicing and payments.

Provider Inquiry

Provider

Mr Clean Jeans Cleaning Service

Person

<All>

Start Date

Check #

Service

<All>

End Date

FILTER

Export to Excel

Sort By

Check #

Records per page

5

Payments Only

Invoices Only

Inv. Det. #	Check #	Person	Service	HCPC	Start/Paid Date	End Date	Unit Rate	# of Units	Amount Invoiced	Payment Amount	Status
6682		Doreen Bauer	Hoarding remediation	S5120	07/18/2018	07/18/2018	\$ 1200.00	-1	\$ -1200.00		S
6681		Doreen Bauer	Hoarding remediation	S5120	07/11/2018	07/11/2018	\$ 1200.00	-2	\$ -2400.00		S
6657		Doreen Bauer	Hoarding remediation	S5120	07/26/2018	07/26/2018	\$ 1200.00	1	\$ 1200.00		I
6656		Doreen Bauer	Hoarding remediation	S5120	07/19/2018	07/19/2018	\$ 1200.00	1	\$ 1200.00		I
6655		Doreen Bauer	Hoarding remediation	S5120	07/18/2018	07/18/2018	\$ 1200.00	1	\$ 1200.00		I

2

Viewing 6-10 of 13 results

You can filter the view in multiple ways to see specific pieces of information, this includes:

- **Person** - you can choose to see "All" people or just one person by choosing them in the drop down list.
- **Service** - you can choose to filter by "All" services that have been contracted for or just a specific service.
- **Start and End Dates** - you can restrict what you are viewing by entering a timespan.
- **Check #** - once you have received notification of the EFT (check) you would be able to filter by the EFT number and the system will return all the people who had been paid by that EFT.

You can also sort the information by:

- Check Number
- Person
- Service
- Paid Date

You can specify the number of record to display per page, if you want to see just invoices or just payments. Once you have your selections made Click on “Filter” and the system will refresh the view. The information display can be exported to Excel by click on the “Export to Excel” button.

Mass Entry

Providers have three ways to submit billing to COA:

- **Mass Entry** - the provider is able to pull up a list of people and services with a calendar view and entry the units provided on each day.
- **Excel Spreadsheet** - they can “Attach” an Excel spreadsheet with billing information.
- **837 billing files** - the provider can choose to submit an 837 file by using the attachment function.

To utilize the Mass Entry Screen the user will select mass entry and the Mass Entry screen will display. The “Bill Type” will be Service Delivery, if you provide multiple services, you should filter by service. You can do this by click on the looking glass and selecting the Service. You are also able to filter by person. You can select the start and end date of the timespan they want to bill for and then Click on “Go”.

The system will only allow you to bill for dates that are within the allowable timespan set by COA.

Mass Service Entry

Provider: Mr Clean Jeans Cleaning Se Bill Type: Service Delivery Service: [Search] Person: [Search]

Search Type: All Start Date: 07/14/2018 End Date: 08/14/2018 GO

SAVE AS DRAFT SUBMIT FOR APPROVAL CANCEL

Once the system has displayed the list of people to bill, you will click on the “+” to expend the detail to get the calendar view.

Mass Service Entry

[◀ Back](#)

Provider

Bill Type

Service

Person

Search Type

Start Date

End Date

[GO](#)

[SAVE AS DRAFT](#)
[SUBMIT FOR APPROVAL](#)
[CANCEL](#)

Include All ☐
Expand All ☐

Include <input type="checkbox"/>	5211	Doreen	Bauer	Auth Id 26990 Hoarding remedia...	Units To Be Submitted 0	Amount To Be Submitted 0	+
----------------------------------	------	--------	-------	-------------------------------------	-------------------------	--------------------------	---

Within the calendar view you will see the following information:

- Units to be submitted on this bill
- Amount to be submitted on this bill
- Description of the Service Authorization - this includes:
 - The Person
 - Date of Birth
 - Provider
 - Service
 - HCPC
 - Start and End date of the service Authorization
 - Unit of Measure
- Total # of Unit on the authorization.
- Units used to date
- Units remaining on authorization
- Rate per unit
- Total Cost of the authorization
- Total amount submitted, but not processed yet
- Total amount paid
- Amount remaining on the authorization

You just enter the number of units delivered on each date. Once you have entered all units for the person you are able to see the total units to be submitted and amount to be submitted.

Units To Be Submitted 3	Amount To Be Submitted 24
-------------------------	---------------------------

Once you have entered all of the billing information for a person, you will click on Include YES to submit the information for billing.

You can choose to “Save as Draft” this does NOT submit the billing for payment, but allows you to come back and continue adding information on a person. If you click on “Submit for Approval” all services marked as “Include: will be submitted to COA for payment. You are able to view the information submitted for billing in the **Provider Inquiry** window after COA creates the invoice.

Mass Service Entry

◀ Back

Provider Bill Type Service Person

Search Type Start Date End Date

SAVE AS DRAFT

SUBMIT FOR APPROVAL

CANCEL

Include All ☐

Expand All ☐

Include ☐ 5211 | Doreen | Bauer | Auth Id 26990 | Hoarding remedia... | Units To Be Submitted 0 | Amount To Be Submitted 0

Description: Doreen Bauer, DOB: 24 May 1942, Mr Clean Jeans Cleaning Service, Hoarding remediation, S5120, Monday, May 7, 2018
Start Date: 05/07/2018 End Date: 12/31/2018 Unit of Measure: Day
Authorization Status: Authorized
Total Units: 40
Units Used: 11.00
Units Remaining: 29.00
Rate per Unit: 1200.0000
Total Cost: 48000.00
Total Submitted: 0.00
Total Paid: 14400.00
Total Remaining: 33600.00

Key:

No Service Created

Service Created

Service Submitted

Service Invoiced

Mon	Tues	Wed	Thurs	Fri	Sat	Sun
7/9 0	7/10 0	7/11 2	7/12 0	7/13 0	7/14 0	7/15 0
7/16 0	7/17 0	7/18 1	7/19 1	7/20 0	7/21 0	7/22 0
7/23 0	7/24 0	7/25 0	7/26 1	7/27 0	7/28 0	7/29 0
7/30 0	7/31 0	8/1 0	8/2 0	8/3 0	8/4 0	8/5 0
8/6 0	8/7 0	8/8 0	8/9 0	8/10 0	8/11 0	8/12 0
8/13 0	8/14 0	8/15 0	8/16 0	8/17 0	8/18 0	8/19 0

The colored key code tells you where the services deliveries are in the payment process.

On – hold dates

You are not allowed to bill for dates the service authorization is “On Hold”, the date will be grayed out and if you hover over the date, a message will display stating that the “Service Authorization On-Hold”.

Include

5185

Christa

Bauer

Auth Id 26907 | Transportation -...

Units To Be Submitted 0

Amount To Be Submitted 0

Description: Christa Bauer, DOB: 13 Apr 1987, Active Day of Cininnati, Transportation - per trip, Non Medic, Friday, March 9, 2018

Start Date: 03/09/2018 End Date: 10/31/2018 Unit of Measure: Trip

Authorization Status: Authorized

Total Units: 204

Units Used: 4.00

Units Remaining: 200.00

Rate per Unit: 9.0000

Total Cost: 1836.00

Total Submitted: 36.00

Total Paid: 0.00

Total Remaining: 1800.00

Key:

No Service Created

Service Created

Service Submitted

Service Invoiced

Mon	Tues	Wed	Thurs	Fri	Sat	Sun
7/16 0	7/17 0	7/18 0	7/19 0	7/20 0	7/21 0	7/22 0
7/23 0	7/24 0	7/25 0	7/26 0	7/27 0	7/28 0	7/29 0
7/30 0	7/31 0	8/1 0	8/2 0	8/3 0	8/4 0	8/5 2
8/6 0	8/7 0	8/8 0	8/9 0	8/10 1	8/11 1	8/12 0
8/13 0	8/14 0	8/15 0	8/16 0	8/17 0	8/18 0	8/19 0

FEEDBACK

Dates outside the acceptable date range

If you attempt to bill for dates outside the acceptable date range, including dates over 72 days in the past or any dates in the future. The system will have those dates grayed out with a message stating that “No Service Created”.

Include

5185

Christa

Bauer

Auth Id 26907 | Transportation -...

Units To Be Submitted 0

Amount To Be Submitted 0

Description: Christa Bauer, DOB: 13 Apr 1987, Active Day of Cininnati, Transportation - per trip, Non Medic, Friday, March 9, 2018

Start Date: 03/09/2018 End Date: 10/31/2018 Unit of Measure: Trip

Authorization Status: Authorized

Total Units: 204

Units Used: 4.00

Units Remaining: 200.00

Rate per Unit: 9.0000

Total Cost: 1836.00

Total Submitted: 36.00

Total Paid: 0.00

Total Remaining: 1800.00

Key:

No Service Created

Service Created

Service Submitted

Service Invoiced

Mon	Tues	Wed	Thurs	Fri	Sat	Sun
7/16 0	7/17 0	7/18 0	7/19 0	7/20 0	7/21 0	7/22 0
7/23 0	7/24 0	7/25 0	7/26 0	7/27 0	7/28 0	7/29 0
7/30 0	7/31 0	8/1 0	8/2 0	8/3 0	8/4 0	8/5 2
8/6 0	8/7 0	8/8 0	8/9 0	8/10 1	8/11 1	8/12 0
8/13 0	8/14 0	8/15 0	8/16 0	8/17 0	8/18 0	8/19 0

FEEDBACK

Charge Adjustments

We know that errors happen and at times you will need to correct or adjust the billing you have submitted. You can make those adjustment in the Mass entry window as long as they fall with the

allowable timespan set by COA, by changing the “Bill Type” to Charge Adjustment and selecting the person to be adjusted and clicking on “Go”.

Expand the Person.

Here are some examples of Charge Adjustments you may make and what you will need to do:

- You over billed units on a date.
 - Click into the date and enter the correct number of units. If the field is “purple” you may see a reduction in your next payment.
- You under billed on a date.
 - Click into the date and enter the correct number of units. If the field is “purple” you will see an addition in your next payment.
- You billed for the wrong date.
 - Click into the wrong date and put 0 in for the number of units and then enter the units in the correct date.
- You billed for the wrong person.
 - Open the file on the person incorrectly billed and enter 0 on each date that had units in them. Then open the correct person and enter the units on the dates services were delivered.

If you find that the correction is for dates no longer available to you, you will need to contact COA for instructions as to how to resolve the issue.

Mass Service Entry

[Back](#)

Provider Blue Moon House Keeping

Bill Type Charge Adjustment

Service

Person

Search Type All

Start Date 06/01/2018

End Date 08/14/2018

[GO](#)

[SUBMIT ADJUSTMENT](#)
[CANCEL](#)

Include All ☐ Expand All ☐

5198	Christain	Bauer	Auth Id 26952 Hoarding remedia...	Units To Be Amended 0	Amount To Be Amended 0	+																																																																																											
Include	5211	Doreen	Bauer	Auth Id 26991 Chore Services	Units To Be Amended 0	Amount To Be Amended 0	+																																																																																										
Include	5211	Doreen	Bauer	Auth Id 26992 Home Care Assist...	Units To Be Amended 0	Amount To Be Amended 0	+																																																																																										
Include	5187	Kyle	Bauer	Auth Id 26975 Home Care Assist...	Units To Be Amended 0	Amount To Be Amended 0	+																																																																																										
<div> Description: Kyle Bauer, DOB: 15 Apr 1989, Blue Moon House Keeping, Home Care Assistance, S5120, Monday, February 26, 2018 Start Date: 02/26/2018 End Date: 09/30/2018 Unit of Measure: 15 Min Unit Authorization Status: Authorized Total Units: 435 Units Used: 36.00 Units Remaining: 399.00 Rate per Unit: 8.0000 Total Cost: 3480.00 Total Submitted: 112.00 Total Paid: 72.00 Total Remaining: 3296.00 </div> <div style="margin-top: 10px;"> Key: No Service Created Service Created Service Submitted Service Invoiced </div> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr> <th>Mon</th><th>Tues</th><th>Wed</th><th>Thurs</th><th>Fri</th><th>Sat</th><th>Sun</th></tr> </thead> <tbody> <tr><td>5/28 0</td><td>5/29 0</td><td>5/30 0</td><td>5/31 4</td><td>6/1 0</td><td>6/2 0</td><td>6/3 0</td></tr> <tr><td>6/4 0</td><td>6/5 0</td><td>6/6 0</td><td>6/7 2</td><td>6/8 2</td><td>6/9 0</td><td>6/10 0</td></tr> <tr><td>6/11 0</td><td>6/12 0</td><td>6/13 0</td><td>6/14 0</td><td>6/15 2</td><td>6/16 1</td><td>6/17 0</td></tr> <tr><td>6/18 0</td><td>6/19 0</td><td>6/20 0</td><td>6/21 2</td><td>6/22 0</td><td>6/23 0</td><td>6/24 0</td></tr> <tr><td>6/25 0</td><td>6/26 3</td><td>6/27 1</td><td>6/28 0</td><td>6/29 2</td><td>6/30 0</td><td>7/1 0</td></tr> <tr><td>7/2 0</td><td>7/3 0</td><td>7/4 0</td><td>7/5 0</td><td>7/6 0</td><td>7/7 0</td><td>7/8 0</td></tr> <tr><td>7/9 0</td><td>7/10 0</td><td>7/11 0</td><td>7/12 0</td><td>7/13 0</td><td>7/14 0</td><td>7/15 0</td></tr> <tr><td>7/16 0</td><td>7/17 0</td><td>7/18 0</td><td>7/19 0</td><td>7/20 0</td><td>7/21 0</td><td>7/22 0</td></tr> <tr><td>7/23 0</td><td>7/24 0</td><td>7/25 0</td><td>7/26 0</td><td>7/27 0</td><td>7/28 0</td><td>7/29 0</td></tr> <tr><td>7/30 0</td><td>7/31 0</td><td>8/1 0</td><td>8/2 0</td><td>8/3 0</td><td>8/4 0</td><td>8/5 0</td></tr> <tr><td>8/6 0</td><td>8/7 0</td><td>8/8 0</td><td>8/9 0</td><td>8/10 0</td><td>8/11 0</td><td>8/12 0</td></tr> <tr><td>8/13 0</td><td>8/14 0</td><td>8/15 0</td><td>8/16 0</td><td>8/17 0</td><td>8/18 0</td><td>8/19 0</td></tr> </tbody> </table>							Mon	Tues	Wed	Thurs	Fri	Sat	Sun	5/28 0	5/29 0	5/30 0	5/31 4	6/1 0	6/2 0	6/3 0	6/4 0	6/5 0	6/6 0	6/7 2	6/8 2	6/9 0	6/10 0	6/11 0	6/12 0	6/13 0	6/14 0	6/15 2	6/16 1	6/17 0	6/18 0	6/19 0	6/20 0	6/21 2	6/22 0	6/23 0	6/24 0	6/25 0	6/26 3	6/27 1	6/28 0	6/29 2	6/30 0	7/1 0	7/2 0	7/3 0	7/4 0	7/5 0	7/6 0	7/7 0	7/8 0	7/9 0	7/10 0	7/11 0	7/12 0	7/13 0	7/14 0	7/15 0	7/16 0	7/17 0	7/18 0	7/19 0	7/20 0	7/21 0	7/22 0	7/23 0	7/24 0	7/25 0	7/26 0	7/27 0	7/28 0	7/29 0	7/30 0	7/31 0	8/1 0	8/2 0	8/3 0	8/4 0	8/5 0	8/6 0	8/7 0	8/8 0	8/9 0	8/10 0	8/11 0	8/12 0	8/13 0	8/14 0	8/15 0	8/16 0	8/17 0	8/18 0	8/19 0
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Include	5187	Kyle	Bauer	Auth Id 26901 Hoarding remedia...	Units To Be Amended 0	Amount To Be Amended 0	+																																																																																										
5160	A New	Person	Auth Id 26997 Hoarding remedia...	Units To Be Amended 0	Amount To Be Amended 0	+																																																																																											

Billing submitted in an Excel Spreadsheet

If you choose to submit your billing in an Excel spreadsheet you **MUST** follow the specifications stated below:

- The file **MUST** be saved as a “.CSV”
- All columns must be included and in the following order:
 - **Client ID** - this can be found on the service authorization
 - **Provider Tax ID** - formatted as XX-XXXXXXX

- **Service Code** - this is the description of the service it must be exactly as displayed on the service authorization
- **Quantity** - number of units being billed.
- **Date of Service** - the date the services were delivered.
- **Cost per Unit** - the unit rate.
- **Client Last Name** - the last name of the person receiving the services.
- **Service Auth #** - the service authorization number

The file can be submitted using the attachment feature. If the file fails, you will receive a message thru portal messaging list the errors.

- We suggest a naming convention to identify each month of billing.

Billing submitted in an 837

You can choose to submit your billing information using the 837 format. The file extension **MUST** be “.dat”. The file will be parsed according to all applicable Federal rules and **MUST** include the Service Authorization number, and appropriate HCPCs and modifiers - these are available on the service authorization. The file will match provider information from either a Federal Tax ID or NPI.

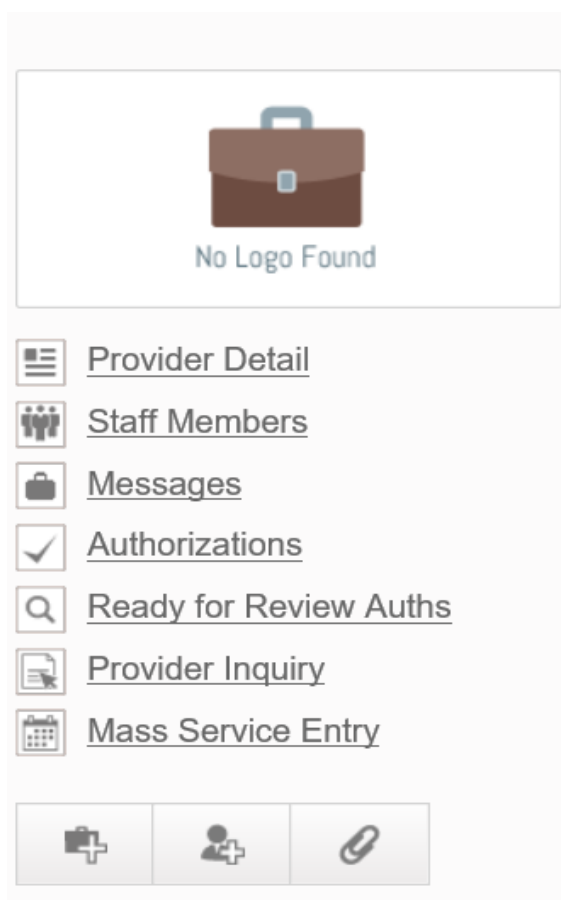
The file can be submitted using the attachment feature. If the file fails, you will receive a message thru portal messaging list the errors.

- We suggest a naming convention to identify each month of billing.

Attachments

You can use attachments to send requested information to COA. Attachments will also be used to submit files for billing if billing is submitted by an Excel spreadsheet or an 837.

To access Attachments you will click on the “Paperclip” icon located on the Provider Home page.



You will need to select the category for the type of attachment you are sending from the drop down list.

Once you select the category, click browse and select the file to be sent. Then click on Upload Attachment.

Attachments

Current Attachment(s)

Upload New Attachment

Select Category*

None



Select Attachment*

Browse...

UPLOAD ATTACHMENT

NOTES