

# Southwest Michigan

## BEHAVIORAL HEALTH

### Care Management Application User Guide

V10/31/2017

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Questions or Concerns?

Contact [providersupport@swmbh.org](mailto:providersupport@swmbh.org) for more information!

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*Questions or Concerns?*  
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# Navigation and Terminology

## Requesting, Changing and Removing Login Credentials

All User Account management activities can be managed by completing an [SWMBH's Online User form](#), and following just a few easy steps;

1. Enter the following password to begin your form
  - a. SWMBH2016!
2. Complete Questions 1 & 2 on the page, identifying yourself and what type of account activity you would like to complete.
3. Complete the General Disclaimer as well
4. Enter user related information on the following two pages.
5. Complete question 10, if applicable.

## Managing My Preferences

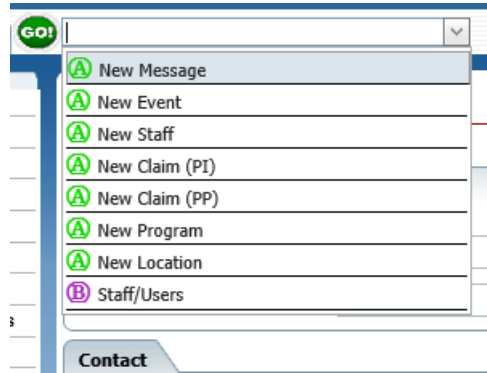
Once logged into the SWMBH Care Management Application, users can customize their experience via the My Preferences banner;

- Password/Confirm Password
  - This field allows users to change their password.
- Security Questions
  - This field allows users to change their designated Security Questions and Answers.
- General Settings

*Questions or Concerns?*

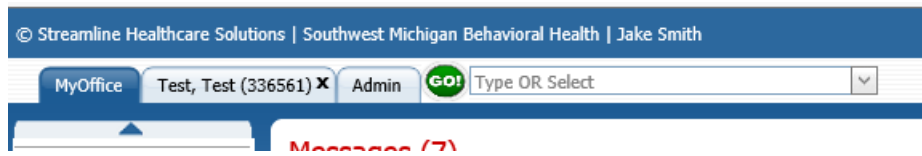
Contact [providersupport@swmbh.org](mailto:providersupport@swmbh.org) for more information!

- Select a screen from the **Home Page** dropdown to choose which screen you'd like to arrive at after each log-in.
- Select a screen from the **Client Page Preference** dropdown to choose which screen you'd like to arrive at when opening a client record.
- Are there some screens you visit so often you'd like a shortcut to? Select screens from the **Quick Action Order** and they will appear on your SmartCare Go! dropdown, for easy navigation;



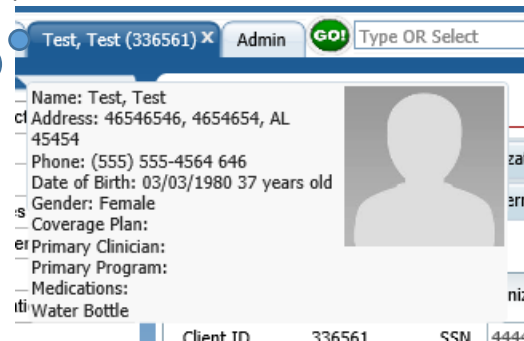
## Banners

Screens in the SWMBH Care Management application are divided into three major sections;



- The **My Office** banner will display the cumulative information relating to your entire agency (or agencies). This provides a broad overview of items found in the banner (Claims, Authorizations, etc.)
- The **Client** banner will display client-specific information, providing client-level information regarding the items found in the banner (Claims, Authorizations, etc.). Note that the Client banner will display the client's name (Last, First) as well as SWMBH's unique Client ID. When hovering over the client's tab, additional information will be displayed for quick reference;

Users are typically granted access to clients based on the delivery of a Release of Information and approval of an Authorization.



Questions or Concerns?

Contact [providersupport@swmbh.org](mailto:providersupport@swmbh.org) for more information!

- The **Provider** banner will display once a provider is selected from the Provider Search tool or any Provider hyperlink.



This banner will provide relevant provider information, such as contract and site information;

Provider Summary			
Provider Name: <u>zTesting</u>	Provider Status: <u>Active</u>	Network Provider: <u>Yes</u>	Provider Type: <u>Facility</u>
Contract Expiration Date: <u>06/01/2020</u>	Insurer: <u>Barry County CMH Authority, Berrien Mental Health Authority, Pines Mental Health Authority, Summit Pointe, SWMBH MH, SWMBH SUD, Van Buren County CMH, Venture SA (DO NOT USE)</u>		
Primary Site:	Site Type:	Site Status:	Address:
Paid YTD:	Payable:	Payable Past 30 Days:	Contact:
Pended:	Pended > than 60 days:	Credit/Receivable:	Phone:
Last Check:	Affiliated with: <u>Yoder, Ariana, Youmans, Theresa, Yuan, MD, Michael, Zalner, Kali</u>		
Other Active Sites:	Note: <u>For testing BCCMHA and Pines Insurers on Auth Events</u>		

## ‘SmartCare Go!’ and other Dropdowns

All of the most common SWMBH Care Management screens are accessible on every page with easy navigation tools.

- Looking to quickly access a report, create a new record or to navigate to a screen which would otherwise be several clicks away? Just begin typing into the **SmartCare GO!** field and you’re on your way;



- Easily access specific client and provider banners via the **Provider and Client** dropdown;



## Toolbars

Toolbars can be found through the application and provide the mechanism for taking a number of relevant actions, most commonly;



New, allows users to create a new version of what they find on the screen.



Save, allows users to save their work.

Questions or Concerns?  
Contact [providersupport@swmbh.org](mailto:providersupport@swmbh.org) for more information!



Delete, allows users to delete items on their screen.



Validate, allows users to confirm all necessary fields have been satisfied prior to signing.



Export, allows users to export listpages into an excel spreadsheet.



Favorites, allow users to add (+) static filter sets in order to auto-populate them into screens.

**Be Cautious!**  
Some Delete buttons will delete entire records, not just screen changes.

Use the same filter set all the time?  
Create a new Favorite and use it to populate your common fields with 1-click!

## Client Records

Once a user has navigated to a client record, there are a number of banner items available for users to work from.

- A variety of basic information is available from the **Client Information** screen. Note however that not all tabs are available to each user;

**Client Information(C)**

General Aliases Demographics Hospitalization Primary care referral Financial Release of Information Log Contacts SA Demographics Client Episodes  
Special Rates Client Referral Family External Referral

**General Information**

Type of Client  Individual  Organization

Client ID 860006 SSN 9999 [Modify...](#) Primary Clinician  Primary Physician

Prefix  First Name test Middle Name  Last Name test Suffix

E-Mail  Medicaid ID   Active Professional Suffix

**Phone Numbers**

Home  DNC  DNLM

Business

Home 2

Business 2

**Addresses**

Home

Billing

[Details...](#) [History](#)

**Comment**

List any special needs or considerations important to note about the client

- Client-level Claims are accessible via the **Claims** banner in the client record. From this screen users can see all claims associated with the specific client they have navigated to;





## Client Claims (2)

All Insurers  All Providers  All Sites

Entered From  Entered To  DOS From  DOS To

Claim Line	Client Name	Provider	DOS	Status	Payable Amount	Insurer	Procedure
3562222	test, test	Community Healing...	09/01/2017	Denied		SWMBH SUD	H0001
3562223	test, test	Community Healing...	08/01/2017	Denied		SWMBH SUD	H0001

- Users are also able to **Create Claims** from this screen, by selecting New Provider Institutional  or New Provider Professional  claim.

## Claim Entry - Professional (PP)

General  Custom Fields

**Client and Provider**  
Cannot proceed without a client and a provider

Auth #

Last Name...  First Name

Provider...  Site

Insurer

**Claim Information**

Claim Received

Clean Claim Date

Claim Status  Entry Complete

**Claim Header**

Patient Account No.

Diagnosis 1.  2.  3.

**Service Lines**

From  To  Code  Modifiers

Units  Charge  POS  Rendering Provider

Dx  [Third Party EOB Information](#) Allowed  Paid  Adj

From	To	CPT Code	Units	POS	Charge	Auth
No data to display						

**Claim Footer**

Tax ID\*  SSN  EIN

Rendering Provider

32. Name and Address of Facility where Services were Rendered

33. Physician, Supplier Billing Name, Address, Zip code && Phone #

Total Charge

Previous Amt Paid

Adjustments

Balance Due

## Claim Entry - Institutional (PI)

General Custom Fields

### Client and Provider

Cannot proceed without a client and a provider

Auth #

Last Name... test

First Name test

Provider...

Site

Insurer

### Claim Information

Claim Received 10/27/2017

Clean Claim Date

Claim Status  Entry Complete

### Claim Header

Patient Account No. 860006

Start Date

Admission Date

Discharge Time

Diagnosis

Admission f14.20

Principal f14.20

1. f14.20

2.

3.

### Service Lines

From

To

Revenue Code

HCPCS Code

Modifiers

Units

Total Charges

Third Party EOB Information

Allowed

Paid

Adj

Estimate Line billing...

Insert

Clear

	From Date	To Date	HCPCS Code	Revenue Code	Charges	Units	Auth
No data to display							

### Claim Footer

Tax ID\*  SSN  EIN

Rendering Provider

Total Charge

Previous Amt Paid

Adjustments

Balance Due

## Third Party EOBs

In the event that a Third Party EOB is required as part of a claim, users can access the EOB fields via the Third Party EOB Information hyperlink on the Claim Form;

### Service Lines

From

07/29/2017

To

07/29/2017

Code

90832

Modifiers

HF

HG

Units

1

Charge

100

POS

11 Office

Rendering Provider

Dx

1

Third Party EOB Information

Allowed

Paid

Adj

Estimate Line billing...

Modify

Clear

Questions or Concerns?  
Contact [providersupport@swmbh.org](mailto:providersupport@swmbh.org) for more information!

From the Third Party EOB Information popup, users can complete the various fields necessary to include EOB information;

Payer	Payer Name	Allowed Amount	Previous Payment	Previous Adjustment	Group Code	Reason
X						
X						

Charge Amount  Total Allowed  Total Paid  Total Adjusted  Claimed Amount

- Payer
  - The primary EOB payer (Commercial Insurance, Self, etc.).
- Payer Name
  - The primary EOB payer name (Blue Cross, Client Name, etc.).
- Allowed Amount
  - EOB Allowed Amount.
- Previous Payment
  - Primary payer previous payment.
- Previous Adjustment
  - Previous Adjustment, if applicable.
- Group Code
  - See dropdown.
- Reason
  - See dropdown.

EOB Calculus- in the event a user is billing for a service, with a previous payment from the primary payer, the SWMBH Care Management adjudication logic will approve the difference between the previously paid amount and the Contract Rate for the code between the secondary insurer and the provider. For Example;

- SWMBH-Provider contract rate = \$85/unit.
- Billed Amount = \$100
- Previous Payment= \$75
- Approved for Payment= \$10

## Estimate Line Billing

Billing the same code which requires a unique claim line over a continuous period of time? Estimate Line Billing allows you to enter in several claim lines at once. Just enter timeframe, code and total charge

*Questions or Concerns?*  
Contact [providersupport@swmbh.org](mailto:providersupport@swmbh.org) for more information!


information in the Service Line window and select the Estimate Line Billing button on the claim form to review the claim line breakdown;

Date Of Service	Units	Charges
07/01/2017	1	10
07/02/2017	1	10
07/03/2017	1	10
07/04/2017	1	10
07/05/2017	1	10
07/06/2017	1	10
07/07/2017	1	10
07/08/2017	1	10
07/09/2017	1	10
07/10/2017	1	10
07/11/2017	1	10
07/12/2017	1	10
07/13/2017	1	10
07/14/2017	1	10
07/15/2017	1	10
07/16/2017	1	10
07/17/2017	1	10
07/18/2017	1	10
07/19/2017	1	10

Code/Modifier: 90792  
 From: 07/01/2017 To: 07/30/2017  
 Total Charge: 300 Total Units: 30  
 Allocated Charges: 300 Allocated Units: 30  
 Reallocate

Pressing Update/Close will create a unique Claim Line for each date of service on your Claim Form.

## Claim Tips

- It is not necessary to enter Authorization Information into this field, SWMBH’s Claim Adjudication process will find it for you!
- Charge keep snapping to \$0? Be sure a;
  - *Rendering Provider is selected (where applicable)*
  - *Contract is in place for the DOS*
- Multiple Claim Lines can be inserted into a single Claim Form—but check your Medicaid Manual for applicability!
- To **Modify a Claim**, simply select the Claim Line hyperlink and select View Claim Form from the toolbar.
  - *Note however that in order to do so, the claim must be at Entry Complete status.*
  - *If the claim is not at Entry Complete status, click the Revert  button to revert.*
- Don’t forget to check out the Status and Payment History window for important information regarding your claim, including;
  - Each **Date** there was **Activity** on a claim and by which **User**
  - Amount **Paid, Denied, Credited**
  - If paid, what **Check #** the Claim was paid on
  - If denied, the **Reason** why

Questions or Concerns?  
 Contact [providersupport@swmbh.org](mailto:providersupport@swmbh.org) for more information!

- Users also able to Revert claims from the Claim Line Detail screen

Status and Payment History											
Date	Activity	Status	Approved	Denied	Paid	Credit	Denial #	Check #	User	Batch Id	Reason
09/06/2017	Adjudication	Denied	\$0.00	\$3.00					CC3	66252	#Member is no...
09/04/2017	Data Entry	Entry Complete							msood		

Client Plans are updated every night via an 834 upload from DHHS. To exclude a client from nightly uploads, see the '834 Exclusion' section.

## Client Plans & Timespans

To review client's enrollment status, navigate to the Client Plans & Timespans banner within the client record.

**Client Plans And Time Spans (2)**

**Client Plans**

Plan Name	Insured Id	Co-Pay	Start Date	End Date	COB	Service Area	
Autism Medicaid	23					MH	Add
MIHealthLin Meridian	23					MH	Add

**Plan Time Spans**  Show Current Plans Only MH Maximize Time Spans

Time Span	Plan Name	Co-Pay	Change COB Order...	Set End Date
10/15/2017 - 10/15/2017	MIHealthLin Meridian	23-	Change COB Order...	Set End Date
10/05/2017 - 10/14/2017	MIHealthLin Meridian	23-	Change COB Order...	Set End Date
	Autism Medicaid	23-		Set End Date
10/04/2017 - 10/04/2017	Autism Medicaid	23-	Change COB Order...	Set End Date

Date Last Verified:

Verified By:

- **Adding or Modifying Plans** is easy just select the 'New' icon in the toolbar to add a new plan or the hyperlink of an existing plan in the Client Plans window to modify;

- Client Co-Pays and Deductibles can be managed from the Client Plans screen as well;

**Client Plans**

General | Claim Information | Copayment | Monthly Deductible

**Copayment Information**

Start Date  End Date

Procedure  Daily  Weekly

Monthly  Yearly   Collect Up Front

All Procedures  Excludes Procedures  Includes Procedures

**Copayment List**

Show Active Only

	Start Date	End Date	Procedure	Daily	Weekly	Monthly	Yearly	Procedure Description
No data to display								

**Client Plans**

General | Claim Information | Copayment | Monthly Deductible

**Monthly Deductible Details** *The Date Met Amount is the amount that will cascade to the next payer for charges on that day.*

Month/Year  Monthly Deductible Met  Yes  Unknown  Never  Estimate Date Met  Date Met Amount

Verified By  Verified On  Source  Source Date

Comment

Cash on Hand:  Monthly Wages:

**Monthly Deductible History**

	Month/Year	Met	Date Met	Date	Verified By	Date Modified
No data to display						

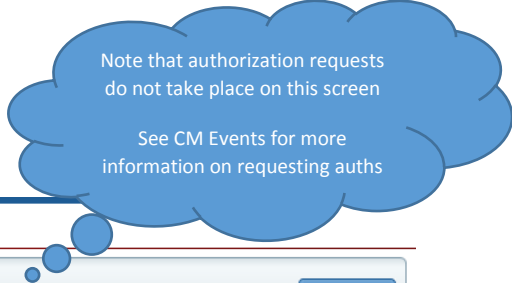
Don't forget to 'Insert' before you save!

- A limited number of SWMBH Affiliate users will have access to the **834 Exclusion Program**, allowing them to exclude clients from nightly DHHS edibility modifications. Please contact [providersupport@swmbh.org](mailto:providersupport@swmbh.org) for a Primer on the process.

Questions or Concerns?  
Contact [providersupport@swmbh.org](mailto:providersupport@swmbh.org) for more information!

## CM Client Authorizations

A Client's Authorization history can be found by navigating to the CM Authorization banner of the Client Record. This listpage will display the full history of the client's authorizations.



**CM Client Authorizations (4)**

Include Exchangeable Codes

Select: All, All on Page, None

Auth Id	Provider Name	Insurer	Site Name	Billing Code	Auth #	Status	Units	Used	From	To
<input type="checkbox"/> 458260	Community Healing...	SWMBH SUD	CHC - Niles	H0001 HF	2016101...	Denial-re...	195		10/13/2016	10/03/2017
<input type="checkbox"/> 510809	Community Program...	SWMBH SUD	Meridian Health Ser...	A0110	2017091...	Approved	12		09/01/2017	09/12/2017
<input type="checkbox"/> 510813	Community Program...	SWMBH SUD	Meridian Health Ser...	A0100	2017091...	Approved	12		09/01/2017	09/12/2017
<input type="checkbox"/> 503140	German, PhD	SWMBH MH	Don-Nee German, P...	90791		Approved	1		07/10/2017	07/10/2017

## CM Events

Much of the work done in the SWMBH Care Management application takes place in the form of Events. From the CM Events listpage users are able to see all relevant events which associated with the client's record.

**CM Events (8)**

Event Id	Event	Date	Status	Staff	Provider
832559	<a href="#">Complex Case Management</a>	10/17/2017 2:20 PM	In Progress	Tenney, Natalie	1800 Wheelchair
827465	<a href="#">Prospective Review CCM</a>	10/05/2017 11:00 AM	In Progress	Smith, Jake	1800 Wheelchair
735746	<a href="#">Authorization Request</a>	01/16/2017 3:28 PM	In Progress	Smith, Jake	1800 Wheelchair
704581	<a href="#">Concurrent Review SUD</a>	10/13/2016 3:59 AM	Completed	Smith, Jake	1800 Wheelchair
704580	<a href="#">Prospective Review SUD</a>	10/13/2016 3:58 AM	Completed	Cassel, Leah	1800 Wheelchair
704579	<a href="#">Authorization Request</a>	10/13/2016 3:55 AM	Completed	Walko, Lyndsay	1800 Wheelchair
704578	<a href="#">Concurrent Review SUD</a>	10/13/2016 3:45 AM	Completed	Walko, Lyndsay	1800 Wheelchair
704577	<a href="#">Concurrent Review SUD</a>	10/13/2016 3:36 AM	Completed	Walko, Lyndsay	1800 Wheelchair

Creating new events is easy as well, just select the 'New' icon from the toolbar and select the Event Type from the dropdown to begin;

## Events

01/16/2017 - Authorization... Go To Sign

View Share Status New Effective 10/27/2017 Author Smith, Jake More Detail

Event Note

**Details**

Event

Date 10/27/2017 Time 2:39 PM

Staff Jake, Smith

Status

Insurer

Provider

Note that an Event must be marked as In Progress in order to access the Note tab to begin.

## Requesting Authorization

- Note that the authorization's Start and End dates cannot eclipse the date of the request.
  - i.e.- If seeking authorization for 10/1/2017-10/30/2017 on 10/27/17, the user must complete two requests
    - 10/1/2017-10/27/2017 AND 10/28/2017-10/30/2017
  - Note that a single Authorization Request form can include several requests, simply by selecting the 'Add Code' button on the form.

## Authorization Request

01/16/2017 - Authorization... Go To Sign

View Share Status New Effective 10/27/2017 Author Smith, Jake More Detail

Event Note

**Authorization Request**

**Insurer**

Insurer  Provider  Insurer and Provider Applies to all authorizations listed below

**Authorizations**

Start Date  End Date  Site

Code  Req Units  How Often ?

Modifiers  Total Units  Add Code  Urgent

**Requestor's Rationale**

**Women's Speciality**

Women's Speciality Program \*  Yes  No (If yes to any of the following questions – Mark Yes for Women's Specialty Program: Is client a pregnant woman? Does the client have dependent children? Is the client trying to regain custody of his/her child(ren)?)

Questions or Concerns?  
Contact [providersupport@swmbh.org](mailto:providersupport@swmbh.org) for more information!



## Event Details

Users are able to re-assign ownership of an In Progress Event, Edit and view previous versions of most completed events via the Event Navigation window;

**BH TEDS Admission**

Go To [dropdown] Sign

Edit Share Status Signed Effective 11/04/2015 Author Smith, Jake Less Detail

**Other Versions**

- 1. 11/04/2015

**Signed By**

- 1. Jake Smith ON 11/04/2015 (1)

**Signer**

Add Signer(s)... [dropdown]

Co-Sign Decline

Document

## Creating New Provider (SUD) Client Records

For SUD Providers tasked with creating their own Provider Client Records, follow these three easy steps from the Client Search form;

1. Enter the Client Name into the relevant fields and select Broad Search
2. Enter the client's SSN into the SSN field and select search
3. Enter the client's DOB into the DOB field and select search

If an existing client provider record is not found, the Create Provider Client will activate, allowing you to select the Provider agency and create a new Provider Client record.

SmartCare

Clear Provider All Providers [dropdown]

**Name Search**  Include Client Contacts  Only Include Active Clients (Checking will not allow option to create new Client)

Broad Search Narrow Search Type of Client  Individual  Organization

Last Name [input] First Name [input] Program [dropdown]

**Other Search Strategies**

SSN Search [input] Phone # Search [input]

DOB Search [input] Master Client ID Search [input]

Primary Clinician Search [dropdown] Client ID Search [input]

Authorization ID / # [input] Insured ID Search [input]

**Records Found**

ID	Master ID	Client Name	SSN/EIN	DOB	Status	City	Primary Clinician	Provider
No data to display								

Create Provider Client Create New Potential Client Select Cancel

Questions or Concerns?  
Contact [providersupport@swmbh.org](mailto:providersupport@swmbh.org) for more information!

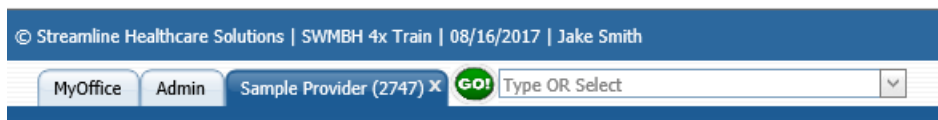
# Provider Management

## Provider Summary

The Provider Summary screen provides an informal summary of information regarding the provider agency. Information on this, and other Provider screens, is managed by SWMBH and/or SWMBH Affiliate staff and is not editable by most users. However, the following screens provider valuable information for users interested in viewing contract parameters.

## Provider ID

SWMBH uses a unique identifier for each of our providers, known as the Provider ID. This ID is distinct from the provider's NPI and EIN, and can be found in parenthesis on the Provider Tab when opened;



## Provider Information

The Provider Information screen provides more detailed information regarding the provider agency, and is managed by SWMBH and/or SWMBH Affiliate staff. General information can be found on the **General** tab;

**Provider Information**

General | Sites | Contact Persons

Type:  Facility  Individual  Active  Non-Network Provider

Provider Name:

Primary Site:

Associated Providers: 

Provider Name
X Tenney, LMSW

Associated Insurers: 

Insurer Name
X SWMBH MH

Data Entry Complete  
 Authorizations cannot be created if data entry is not complete  
 Uses Provider Access  
 Substance Use Provider  
 Rendering Provider  
 Credentialed Approaching Expiration

External ID:  Website:

Provider Comment:

Associated Placement Family:

Adding clinical staff?  
Don't forget to let SWMBH know so we can link them to your agency as Associated Providers. Otherwise, they may not be available on your claim forms for billing purposes!

Questions or Concerns?  
Contact [providersupport@swmbh.org](mailto:providersupport@swmbh.org) for more information!

The **Sites** tab of the Provider Information screen provided detailed information regarding the location of clinical and administrative services for the provider agency;

## Provider Contracts

The Provider Contracts summary screen provides a record of all provider agency contracts;

Contract ID	Insurer	Type	Contract Name	Start Date	Expiration Date
4414	SWMBH MH	Signed Contract	Sample Pro - SWMBH MH - 201710	10/01/2017	10/30/2018

Questions or Concerns?  
 Contact [providersupport@swmbh.org](mailto:providersupport@swmbh.org) for more information!

Clicking the Contract ID hyperlink will allow users to navigate to a contract detail screen which provides additional information regarding the contract parameters, as well as additional tabs regarding individual contract Rates and Rules;

The screenshot shows the 'Contract Details' screen with the following information:

- Contract Details** (Active)
- Insurer:** SWMBH MH
- Contract Start Date:** 10/01/2017
- Expiration Date:** 10/30/2018
- Contract Name:** Sample Pro - SWMBH MH - 201710
- Type:** Signed Contract
- Payment Terms:** 30 Days
- Claims must be received within:** 365 days from the date of service. Older claims will be  Pended  Denied
- The total dollar value of this contract may not exceed:** [Empty field]
- Current claims approved and paid:** [Empty field]
- % of Cap used:** [Empty field]
- Provider/Site must be credentialed else the claim will be pended
- Rendering provider must be credentialed else the claim will be pended
- Contract Notes:** [Empty text area]

The **Contract Rates** tab of the Contract Details screen provides details regarding the rates for individual codes present in a contract;

The screenshot shows the 'Contract Rates' tab with the following table:

Rate ID	Code + Modifier (s)	Name	Rate/Unit	Contract Rate	Sites	Client	Coverage Plan	Modified Start Date	Modified End Date	Associated Providers	Licensure Group
<input type="checkbox"/> 53146	0359T:U5:	0359T:U5	1.00 Units	\$100.00			Autism Medi...			No	
<input type="checkbox"/> 53147	0362T	0362T	30.00 Mi...	\$95.00			Autism Medi...			No	
<input type="checkbox"/> 53148	90832	90832	1.00 Ite...	\$85.00						Yes	
<input type="checkbox"/> 53149	90838	90838	1.00 Ite...	\$0.00				10/01/2017	12/31/2017	Yes	

Note that rates can be broadly applied to any occasion in which a code is billed during the contract period, or additional parameters can be added for the rate which will only allow claim approval in the event one or more variables are achieved, including;

- Site- Rate is only applicable to a specific site(s).
- Client- Rate is only applicable to a specific client(s).
- Coverage Plan- Rate is only applicable in the event that the client is enrolled in a specific plan(s).

Questions or Concerns?  
 Contact [providersupport@swmbh.org](mailto:providersupport@swmbh.org) for more information!

- Modified Start/End Dates- In the event the provider agency is only contracted to provide a service for a portion of the contract period, or a rate change has taken place during the contract period.
- Associated (Rendering) Providers- Rate is only applicable is the service is provided by appropriately credentialed Associated (Rendering Providers).
- Licensure Group- Rate is only applicable when provided by a specific licensure group.

Select the Rate ID hyperlink to view expanded details for any of the codes available in the contract.

**Associated (Rendering) Providers**, are necessary for the delivery of certain services. The SWMBH Care Management application associates these clinicians to specific codes in provider contracts via the Specify Associated Providers button on the Contract Rates Detail Screen, accessible via the Rate ID hyperlink on the Contract Detail screen;

If an Associated (Rendering) Provider is not selected as part of the approved list of clinicians associated with the code in question, claims associated for the code + clinician will not approve. Please contact your local CMH or SWMBH Contracting Department for additional information regarding Credentialing.

The **Billing Code Rules** tab of the Contract Details screen provides additional details regarding the parameters for billing specific codes during the contract terms. Please contact your local CMH or SWMBH Contracting Department for additional information regarding Billing Code Rules.

Questions or Concerns?  
 Contact [providersupport@swmbh.org](mailto:providersupport@swmbh.org) for more information!

## Provider Documents

The Provider Documents banner allows users to access scanned records of documents associated with the Provider Agency. Users are also able to add additional documents to the list via the .pdf icon in the Provider Documents toolbar;

The screenshot shows the 'Provider Documents (1)' banner. At the top, there is a search bar with 'Sample Provider (2747)' and a 'GO!' button. Below this, there are several filter options: 'Provider' (2747, Sample Provider), 'All Record Types', 'Show Scanned/Uploaded' (Smith, Jake), 'All Statuses' (Other), and 'Effective Dates Between' (Created Between 09/29/2017 and 10/30/2017). An 'Apply Filter' button is on the right. Below the filters is a table with the following data:

Associated With	ID	Name	Record Type	Created	Effective	Scanned By	Status
Provider	2747	Sample Provider	Scanned Contract (FY...	10/30/2017	10/30/2017	Smith, Jake	Completed

## Provider Rates

The Provider Rates banner provides an easily sortable listpage of all Rates associated with the Provider Agency.

The screenshot shows the 'Provider Rates (4)' banner. At the top, there is a search bar with 'Sample Provider (2747)' and a 'GO!' button. Below this, there are several filter options: 'All Insurers', 'All Sites', 'All Clients', 'All Contracts', and 'Effective As Of'. An 'Apply Filter' button is on the right. Below the filters is a table with the following data:

Rate Id	Code	Name	Rate Unit	Contract Rate	Start	End	Site	Client	Insurer
53146	0359T U5	ABA Behavior Identifi...	1 Units	\$100.00	10/01/2017	10/30/2018	No	No	SWMBH MH
53147	0362T	ABA Behavioral Follo...	30 Minutes	\$95.00	10/01/2017	10/30/2018	No	No	SWMBH MH
53148	90832	Indiv Therapy 16-37...	1 Items	\$85.00	10/01/2017	10/30/2018	No	No	SWMBH MH
53149	90838	Psychotherapy 60 mi...	1 Items	\$0.00	10/01/2017	12/31/2017	No	No	SWMBH MH

# My Office

The My Office banner of the SWMBH Care Management application allows users to manage various agency-level information, similar to the way the Client Banner allows users to manage various client-level information.

## Claims

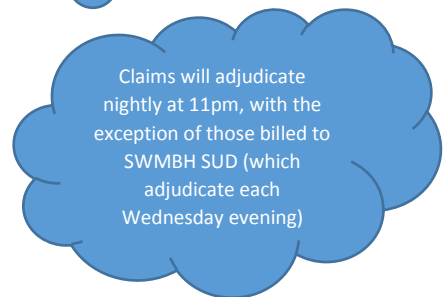
A listpage of all claims associated with the Provider and Insurer associated with the user's account permissions are available via the My Office: Claims banner;

Claim Line	Client Name	Provider	DOS	Status	Payable Amount	Insurer	Procedure	Units	Denial Reasons
------------	-------------	----------	-----	--------	----------------	---------	-----------	-------	----------------

**New Claims** can be created via the My Office: Claims Toolbar, in the same fashion they are created in the Client: Claims Toolbar. See pg. 8 for additional guidance on creating New Claims.

In order to assure proper payment for services it's important to **Track Claims**, something easier than ever with SWMBH Care Management's Claim Line Status filters. Some of the most common Status filters are;

- Entry Complete- provides a list of all claims which have not achieved a determination status and awaiting adjudication.
- Denied- provides a list of all denied claims which may require further review.
- Partially Approved- provides a list of all claims which have achieved approval status, but not for the entire amount billed.
- To Be Paid- provides a list of claims pending payment.



## Troubleshooting Common Denial Reasons

For claims which are Denied or Partially Approved, users can review the Denial Reasons column of the Claim Lines listpage for an explanation of the determination. Common Denial Reasons are;

- Billing Code is an Add-on and Primary Service Billing Code is missing-
  - Several codes, primarily ABA benefit, require a Primary Service billing code to achieve approved status prior to any Add-ons being approved. Please contact your local CMH Contracting Department for additional guidance.
- Billing Code requires Authorization and one does not exist-

Questions or Concerns?  
Contact [providersupport@swmbh.org](mailto:providersupport@swmbh.org) for more information!

- Users will encounter this denial reason in the event the claim they are attempting to bill does not have prior authorization, or the previous authorization has been exhausted. Users can review a client’s Authorization via the CM Client Authorization banner of the Client record (pg.15).
- Note that any modifier, site or other restrictions may be applied to the authorization and must be matched verbatim (in most cases) on the claim.
- Billing Code Unit Frequency exceeds Contract Rules-
  - In addition to universal rules surrounding the frequency in which a code can be billed, some provider contracts also enforce unique contract rules.
  - These rules can be viewed via the Billing Code Rules portion of the Provider banner (pg.21).
  - Please contact your local CMH Contracting Department for additional guidance.
- Claim was received after period mentioned in Contract-
  - Users will encounter this denial reason when the claim is submitted after the period mentioned in the contract.
  - Users can view the contract details regarding claim timeliness on the Contracts portion of the Provider banner (pg.19)
- Member is not eligible for any Plan-
  - Users will encounter this denial reason in the event that there is no appropriate coverage plan for the client on the claim’s date of service.
  - Additional details regarding client eligibility can be found on the Plans & Timespans portion of the Client banner (pg.13)
- No Rate can be found for this Claim Line-
  - Users will encounter this denial reason when the adjudication process is unable to locate an applicable contract rate for the billing variables present on the claim form.
  - The adjudication process will review the relevant contract in the pursuit of matching the DOS, Site, Billing Code, Billing Code Modifiers and Associated (Rendering) Provider found on the claim form.
  - Additional details regarding contract variables can be found on the Contracts portion of the Provider banner (pg.20)
- Waiting for 3<sup>rd</sup> Party EOB-
  - In the event that a claim requires an EOB, users will be required to revert the claim(s) in question to Entry Complete and utilize the Third Party EOB Information to complete this information.
  - Users will also need to uncheck the Previous Payer EOB Received checkbox in order to make the claimline available for re-adjudication;

Do Not Adjudicate  
 Readjudicate

Needs to be worked  
 Previous Payer EOB Received

## 837 Import

Qualified providers are able to upload 837 text files directly into the application through the 837 banner. An 837 Companion Guide is available for those interested in utilizing this method of billing. Please contact [providersupport@swmbh.org](mailto:providersupport@swmbh.org) if you would like to know more.

*Questions or Concerns?*  
 Contact [providersupport@swmbh.org](mailto:providersupport@swmbh.org) for more information!



## Checks

SWMBH Care Management users are able to view Checks and Remittance Advice copies via the Checks portion of the My Office Banner;

**Checks (0)**

SWMBH MH zTesting Apply Filter

All Bank Accounts All Check Statuses Check Date From 07/18/2017 Check Date To 10/18/2017

Select: All, All on Page, None

Date	Check Number	Payee	Payment Amt	Insurer	Bank Account	Check Status
No data to display						

Users are able to **View Check Details** by clicking on the Check Number hyperlink on their checks listpage. From this point users will be able to view each claim line associated with the check;

**Check Details**

**Check Information**

Void Checks Print Check Next Available # 12263 Export 835 File Print RA  Include Pended Claims on RA

**Check Actions**

Check Date 07/21/2017 Check Number 12262 Amount 464.71 Insurer SWMBH MH

Payable To Tax Id  This is a Refund Return Check

Printed By glm Printed On 07/21/2017  This is Check is Void

**Below is a List of Claim Lines paid by this Check**

Claim Line	DOS	Billing Code	Units	Amount	Client Name	Client Id
3514865	7/17/2017 12:00...	90837	1	\$126.75		522718
3514864	6/8/2017 12:00...	90834	1	\$84.49		522718
3514863	5/8/2017 12:00...	90834	1	\$84.49		522718
3514862	4/10/2017 12:00...	90834	1	\$84.49		522718
3514861	3/14/2017 12:00...	90834	1	\$84.49		522718

Users may also select the **Print RA** button to generate a .pdf file of the relative check RA;

## Messaging

SWMBH Care Management users may send secured messages between application users via the Messages portion of the My Office banner;

**Messages (6)**

Inbox | **Sent Messages** | Compose Messages

This Week | From: 10/30/2017 | To: 10/30/2017 | From Everyone | **Apply Filter**

<input type="checkbox"/>	<input type="radio"/>	Status	From	Received	Client	Subject	Priority	Reference
<input type="checkbox"/>	<input type="radio"/>	Not Read		10/30/2017		Adjudication Job: Oct 30, 17	Normal	
<input type="checkbox"/>	<input type="radio"/>	Not Read		10/30/2017		Adjudication Job: Oct 30, 17	Normal	
<input type="checkbox"/>	<input type="radio"/>	Not Read		10/30/2017		Adjudication Job: Oct 30, 17	Normal	
<input type="checkbox"/>	<input type="radio"/>	Not Read		10/30/2017		Adjudication Job: Oct 30, 17	Normal	
<input type="checkbox"/>	<input type="radio"/>	Not Read		10/30/2017		Adjudication Job: Oct 30, 17	Normal	
<input type="checkbox"/>	<input type="radio"/>	Not Read		10/30/2017		Adjudication Job: Oct 30, 17	Normal	

Messages received by the users can be found in the **Inbox** and will display in the Details tab of the screen once the radio button in the second column of the message's row is selected;

**Details**

From:  Received:  Subject:

To:  Client:  Reference:

Users are also able to view messages they've sent via the **Sent Messages** tab.

Sending messages is easy as well, via the **Compose Messages** tab;

**Compose Message**

Inbox | **Sent Messages** | Compose Messages

Selected client will be associated with the message.  **Add To Send List** **Send**

Selected client contact will be associated with the message.  **Add To Send List**

To

- Aardema, Andy**
- Aardema, Andy-test
- Acker, Katie
- Admin, Admin
- Administrator, CM
- Agler, Linda
- Ahmadpour, Mitra
- Alvarez, Karen
- Ameter, Sarah
- Anani, Sara
- Anderson, Amy

**Add >>** **<< Remove**


Priority:  Normal  Caution/Alert  Urgent

Subject:

*Need help regarding specific non-technical issues? Message one of the following mailboxes for guidance;*

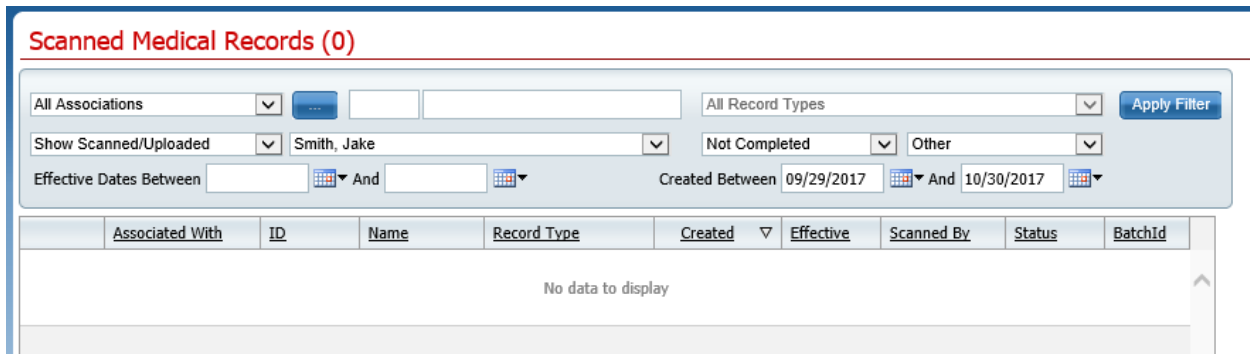
- SWMBH Case Manager
- SWMBH Customer Service
- SWMBH MHL (MI Health Link)


Questions or Concerns?  
 Contact [providersupport@swmbh.org](mailto:providersupport@swmbh.org) for more information!

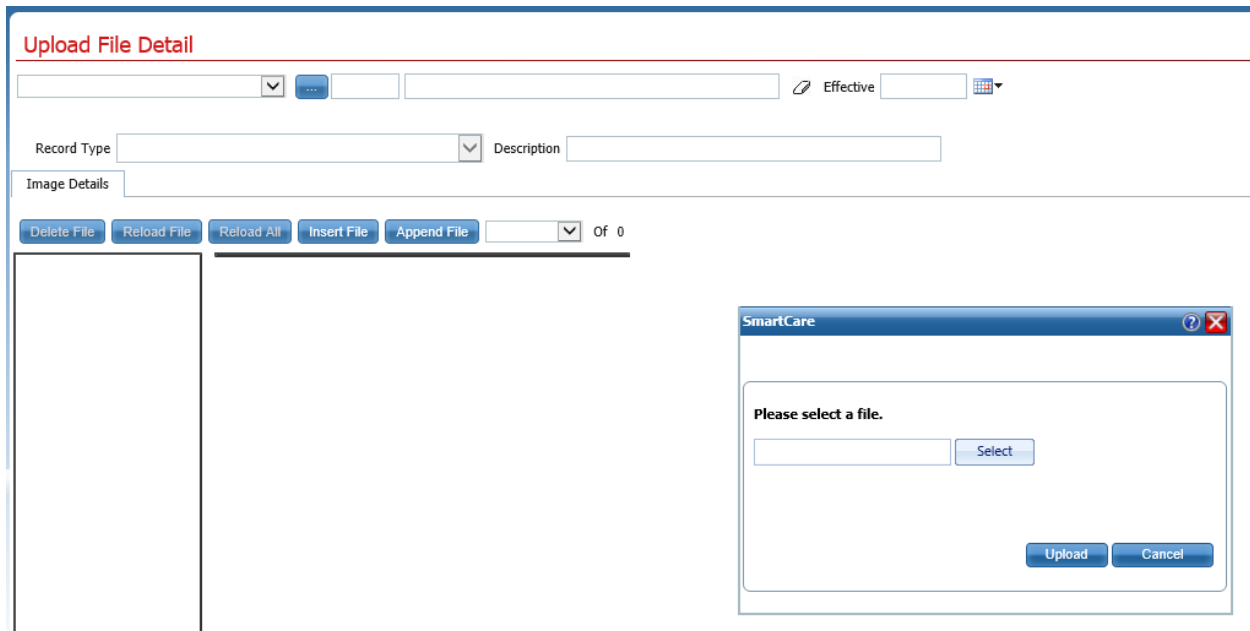
Users can send messages to one, or more users from this window and even reference a specific client via the  field on the screen.

## Scanning

SWMBH Care Management users have the ability to view and upload relevant client records directly into the client file via the Scanning portion of the My Office banner. Users can view a list of all previously scanned records which they have uploaded via the the Scanning listpage;



New files can be uploaded via the  icon in the toolbar as well, and can even include free-text descriptions for context;



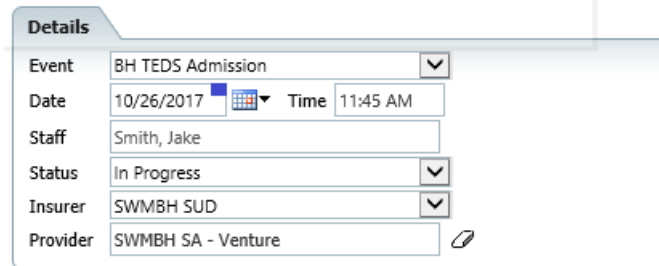
## Reports

Various reports are available to SWMBH Care Management Users via the My Reports portion of the My Office Banner. Reports are dependent on the user's role, please contact [providersupport@swmbh.org](mailto:providersupport@swmbh.org) with any special report requests.

Questions or Concerns?  
Contact [providersupport@swmbh.org](mailto:providersupport@swmbh.org) for more information!

## Troubleshooting and Support


**Hoverhelp** is deployed throughout the SWMBH Care Management as a means to guide users through commonly troublesome tasks. Hoverhelp is marked by a blue box over a specific field, which provides guidance to the user when the cursor hovers over;



The image shows a 'Details' form with the following fields:

Event	BH TEDS Admission	▼
Date	10/26/2017	Time 11:45 AM
Staff	Smith, Jake	
Status	In Progress	▼
Insurer	SWMBH SUD	▼
Provider	SWMBH SA - Venture	✎

A blue box with a question mark icon is overlaid on the Date field.

Additional help is provided wherever  icons are found.