

# NEW HAMPSHIRE BILLING & EXPORT PROCESS REVIEW

[Closed Visit Check](#)

[Visit Approval Dashboard \(VAD\) Review](#)

[Calculate Billing](#)

[Re-Delivery](#)

## CLOSED VISIT CHECK

Before you can begin the billing process, you will need to check the billing period for any Scheduled visits. If there are scheduled visits they will not bill or pay and they will not show up in the Visit Approval Dashboard. You will want to Close, Cancel, or Delete these visits.

For visits that are still in the status of Scheduled, these visits can be identified by going to the Visits page and searching for all visits still in the status of Scheduled with a date range ending yesterday. These visits will need to be manually closed, canceled, or deleted as appropriate.

*To cancel the visit(s),*

- Select the visits
- Click the Cancel Visits button

Search for Visits

Note: There are 15 records. Query return maximum 500 records per search.

Visit Date

Visit Start Date06/01/2020

Visit End Date06/08/2020

Visit Name

Visit StatusScheduled

Visit Number

Visit Type-- All --

Payer Descriptor-- All --

☐ Search for Client Payer Descriptor

Client ID

Client First Name

Client Last Name

Caregiver-- All --

Company Name

Time Interval12:00 AM - 11:59 PM

☐ Sunday ☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday ☐ Saturday

☐ Show only non-reconciled visits

☐ Show only visits with documents marked for review

☐ Show only reviewed visits

City

State

Postal Code

Zone-- All --

Client Status-- All --

Distance from Branch

Caregiver First Name

Caregiver Last Name

Client Skill-- All --

Caregiver Skill-- All --

Results Per Page20

Search

Create New Visits

Print Selected Visits

	I.S.	Client Name	Assigned Caregiver	Visit Type	Scheduled Date	Scheduled Times	Visit Date	Visit Times	Payer Descriptor	Visit ID	Status					
<input checked="" type="checkbox"/>		Sunshine, Suzie	Support, Ankota	MCO - Personal Care	06/04/2020	08:00 AM - 10:00 AM (2.00)	Thu 06/04/2020			38707861-cd0bb7d2-45	Scheduled					
<input checked="" type="checkbox"/>		Newman, Paul	Washington, Kerry	MCO - Respite Care	06/05/2020	08:00 AM - 10:00 AM (2.00)	Fri 06/05/2020			36307880-5663b82b-62	Scheduled					
<input checked="" type="checkbox"/>		Sunshine, Suzie	Support, Ankota	MCO - Personal Care	06/05/2020	08:00 AM - 10:00 AM (2.00)	Fri 06/05/2020			38707861-cd0bb7d2-46	Scheduled					

Change Type

Cancel Visits

Delete Visits

Cancel Assignments

Report Visit Completion

Assign to another caregiver

Set Scheduled Date/Times

Find Matching Caregivers

Map Visits

Add Notes

Change Status

Set Address

Process Documents

Calculate Travel Time

Change Visit Payer Descriptor

Visit Care Codes

To delete the visit(s),

- Select the visits
- Click the Delete Visits button

Search for Visits

Note: There are 15 records. Query return maximum 500 records per search.

Visit Date

Visit Start Date06/01/2020

Visit End Date06/08/2020

Visit Name

Visit StatusScheduled

Visit Number

Visit Type-- All --

Payer Descriptor-- All --

☐ Search For Client Payer Descriptor

Client ID

Client First Name

Client Last Name

Caregiver-- All --

Company Name

Time Interval12:00 AM - 11:59 PM

☐ Sunday☐ Monday☐ Tuesday☐ Wednesday☐ Thursday☐ Friday☐ Saturday

☐ Show only non-reconciled visits☐ Show only visits with documents marked for review☐ Show only reviewed visits

City

State

Postal Code

Zone-- All --

Client Status-- All --

Distance from Branch

Caregiver First Name

Caregiver Last Name

Client Skill-- All --

Caregiver Skill-- All --

Results Per Page20

Search

Create New Visits

Print Selected Visits

<input checked="" type="checkbox"/>	I.S.	Client Name	Assigned Caregiver	Visit Type	Scheduled Date	Scheduled Times	Visit Date	Visit Times	Payer Descriptor	Visit ID	Status					
<input checked="" type="checkbox"/>		Sunshine, Suzie	Support, Ankota	MCO - Personal Care	06/04/2020	08:00 AM - 10:00 AM (2:00)	Thu 06/04/2020				Scheduled					
<input checked="" type="checkbox"/>		Newman, Paul	Washington, Kerry	MCO - Respite Care	06/05/2020	08:00 AM - 10:00 AM (2:00)	Fri 06/05/2020				Scheduled					
<input checked="" type="checkbox"/>		Sunshine, Suzie	Support, Ankota	MCO - Personal Care	06/05/2020	08:00 AM - 10:00 AM (2:00)	Fri 06/05/2020				Scheduled					

Change Type

Cancel Visits

Delete Visits

Cancel Assignments

Report Visit Completion

Assign to another caregiver

Set Scheduled Date/Times

Find Matching Caregivers

Map Visits

Add Notes

Change Status

Set Address

Process Documents

Calculate Travel Time

Change Visit Payer Descriptor

Visit Care Codes

To close the visit(s),

again filter for the appropriate visits on the Visits page. Next, close the visit either by clicking the edit (pencil and paper) icon and closing it individually, or selecting all the visits you wish to close and clicking the Report Visit Completion button. Be sure to put in the appropriate clock in/out times, whichever method you choose.

If desired, you can also click on the book icon and report care plan items as needed, and/or click on the paperclip icon to upload a copy of supporting documentation (such as a scanned timesheet).



If a visit has been held up for review, most likely there is a violation of one of your company rules. To begin your visit review, scroll down to the bottom of the page to view the full report. Anything requiring review will be flagged in red. In the example below, you see numerous rule violations.

Item Description	Reported Value	Tolerance Limit	Violation	Overriden	Resolved Notes	Resolved By	Resolved Date	
Clean Floor	Complete		No	No				
Dressing and Grooming	Not Needed Today		No	No				
Tidy and Dust	Complete		No	No				
Clean Bath	Complete		No	No				
Visit duration +/- _ minutes from scheduled duration	1 h 57 m	0 h 7 m	Yes	No				Mark as Resolved
Less than _ percent of tasks complete or already done	75	100	Yes	No				Mark as Resolved
Visit start time +/- _ minutes from scheduled start time	10 h 43 m	0 h 15 m	Yes	No				Mark as Resolved
Mobile - Non arrival GPS location > _ miles difference	1039.44449037302	0.03	Yes	No				Mark as Resolved
Mobile - Non departure GPS location > _ miles difference	1039.44492982404	0.03	Yes	No				Mark as Resolved
Warning if bill amount is 0			Yes	No				Mark as Resolved
Warning if pay amount is 0			Yes	No				Mark as Resolved

**Client Messages**

No results found with the search criteria.

These line items are purely calls to action. Clicking on each red warning and marking it as resolved is for recordkeeping purposes only.

For example, in the screenshot above you see there is a warning that the pay amount is zero. To correct this, you would open the caregiver's profile, enter a new pay rate, save, and then return to the Visit Approval Dashboard to mark this item as resolved.

Caregiver, Cary - Detail Primary PH: 919-455-6393 (M)

Change caregiver: Caregiver, Cary

**Active**

Personal | HR | Skill | Availability | Configuration | Roles | Scheduling | Employment | Documents | Auto-Apply Care Codes | Schedule Board

User Role: Caregiver Gender: -- Not Set -- Show Image

Create Web User ☒

First Name: \* Cary User Id: \* mo.cary Check

M.I./Maiden: Last Name: \* Caregiver Password: \* ..... Confirm Password: \* ..... Check

Title: Date of Birth: SSN: Create IVR/Mobile User ☒

Caregiver ID: \* User Number: 140 Check

Caregiver Code: Pin: 140 Status: Active Caregiver Level: ☆☆☆☆☆

Emerg. Contact: E.C. Relationship: -- Not Set -- E.C. Phone: E.C. Email: E.C. Address: E.C. City: E.C. State: E.C. Zip:

Enter the pay rate, save, and then return to the Visit Approval Dashboard to mark this issue as resolved.

Pay Rate: \$ 0.00 per hour

Finance ID: Is Vendor:

Visit duration +/- _ minutes from scheduled duration	1 h 57 m	0 h 7 m	Yes	No	Mark as
Less than _ percent of tasks complete or already done	75				olved
Visit start time +/- _ minutes from scheduled start time	10 h 43 m				olved
Mobile - Non arrival GPS location > _ miles difference	1039.44449037302				olved
Mobile - Non departure GPS location > _ miles difference	1039.44492982404				olved
Warning if bill amount is 0					olved
Warning if pay amount is 0					olved

**Violation Details**

Item Configuration: Warning if pay amount is 0

Reported Value:

Notes:

The correct pay rate was entered and saved for this caregiver

Resolve Cancel

Client Messages

Once you entered the update and clicked Resolve, this would update your record and change the warning to a Resolved status in green.

Warning if pay amount is 0			Yes	Yes	The correct pay rate was entered and saved for this caregiver.	Ankota, Support	3/31/2020 10:13:01 AM	Resolved
----------------------------	--	--	-----	-----	----------------------------------------------------------------	-----------------	-----------------------	----------

Similarly, each of the remaining red warnings would need to be reviewed and action would need to be taken before marking them as resolved.

## Re-run Rules for Selected Visits

Within the Visit Approval Dashboard there is a button called Run Rules. If you select the visits by using the checkboxes to the left and then click Run Rules, the selected/filtered visits have all rules run again. If an error that was flagged on the visit no longer applies, the violation will be marked Resolved and the red line will turn green with the current date and time in approximately 2 minutes.

- This function is limited to 1,000 visits maximum. If more than 1,000 visits are filtered, a pop-up that says "Rules can be re-run only if there are 1,000 visits or less selected. Please select fewer visits" will appear.
- If no changes are identified there will be no update on any violations (whether approved or not)
- Expected violations will be affected include missing IDs, missing authorizations, missing bill rates, missing pay rates, etc.
- Wait 2 minutes after clicking the button to take effect
- **Run Rules can only be used once on a visit, so complete all updates before running rules**

**For example:** John Doe was entered without a Medicaid ID. An admin goes in to review visits from last week and realizes the issue affected every visit from last week. She fixes the Medicaid ID, then re-runs rules on last week's visits for John. She waits 2 minutes, then refreshes. Each Medicaid ID violation is marked as resolved by the system. If that was the only error, those visits no longer need approval.

**Visit Approval Dashboard**

Client: --- All --- Caregiver: --- All --- Visit Status: --- All ---  
 Date From: 6/2/2022 Date To: 6/9/2022 Approval Type: --- All ---  
 Violations: -- All -- Visit Arrival Method: --- All --- Visit Closure Method: --- All --- Visit ID:   
 Run Rules View Report

	Caregiver	Client Name	Care Plan	Visit Type	Arrival Date/Time	Departure Date/Time	Visit Status	Approval Type	
<input type="checkbox"/>	Caregiver, Val	Test, Mary	Mary Test	Facility Shift	06/02/2022 02:00 AM	06/02/2022 03:00 AM	Needs Approval	Regular	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Caregiver, Val	Degas, Edgar	Edgar Degas	Personal Care - In Home	06/02/2022 04:00 AM	06/02/2022 08:23 AM	Needs Approval	Needs QA	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Asta, Vincent	Test, Mary	Mary Test	Homemaker / Chore	06/02/2022 08:00 AM	06/02/2022 09:00 AM	Needs Approval	Needs QA	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Caregiver, Val	Degas, Edgar	Edgar Degas	Personal Care - In Home	06/02/2022 08:27 AM	06/02/2022 10:27 AM	Needs Approval	Needs QA	<input checked="" type="checkbox"/>

## CALCULATE BILLING

**Important Note: Data is exported to Authenticare upon billing (completed status).**

Ankota users will calculate billing regularly as part of the process of ensuring their invoices are timely and accurate. In order to calculate billing, please note that you will first need to ensure that visits are closed and approved, and any exceptions have been addressed.

To begin, go the Main Menu, click Billing, and then click Calculate Billing/Payroll.

**Reporting**

- Billing**
  - Billing Report(Client)
  - Payroll Report(Caregiver)
  - Calculate Billing / Payroll**
  - Adjustments
  - Visit Closure Report
  - AR Screen
  - Accounts Receivable
  - Invoice Summary Report

Next to Operation, select Billing - Client from the drop-down menu and enter the date range. Best practice is to set the start date to your Ankota start date to ensure any previously unbilled visits are visible. Please note we will never bill for the same visit twice, so there is no danger in choosing the earliest possible start date. The system will only pick up the the unbilled visits.

**Calculate Billing / Payroll**

Operation: Billing - Client Agency: -- Select Payer Descriptor --

Client First Name:  Client Last Name:  Client ID:

Date From: 05/01/2017 Date To: 05/08/2024 Visit Type Category: --Select Visit Category Type-- Visit Type: -- Select Visit Type --

Status: ☐ Complete ☒ Draft

[View Closed Unbilled Orders](#)  
[Orders For Inactive Clients](#)

[Search for Billable Items](#)

[Add New Adjustment](#)

**NOTE:** for clients that do not need to review billing drafts (such as clients that ONLY use the billing process to trigger sending data to an aggregator), you can change the status to Complete. This enables you to skip the Billing Report page review and go straight to complete.

**Calculate Billing / Payroll**

Operation: Billing - Client Agency: -- Select Payer Descriptor --

Client First Name:  Client Last Name:  Client ID:

Date From: 05/01/2017 Date To: 05/08/2024 Visit Type Category: --Select Visit Category Type-- Visit Type: -- Select Visit Type --

Status: ☒ Complete ☐ Draft

[View Closed Unbilled Orders](#)  
[Orders For Inactive Clients](#)

[Search for Billable Items](#)

[Add New Adjustment](#)

If you wish to filter for a particular payer, client, visit category, or visit type, you may also do so at this time.

**Sandbox**

**Calculate Billing / Payroll**

Operation: Billing - Client Agency: -- Select Payer Descriptor --

Client First Name:  Client Last Name:  Client ID:

Date From: 05/01/2017 Date To: 05/08/2024 Visit Type Category: --Select Visit Category Type-- Visit Type: -- Select Visit Type --

Status: ☒ Complete ☐ Draft

[View Closed Unbilled Orders](#)  
[Orders For Inactive Clients](#)

[Search for Billable Items](#)

[Add New Adjustment](#)

When you are ready, click Search for Billable Items. A list of visits will appear.

	Visit ID	Visit Type	Client Name	Caregiver Name	Date	Billable Time	Special Bill	Upcharge	Charge Amount	Modified	Visit Line Items
<input checked="" type="checkbox"/>	26628095-028233c8-132	Private Pay	Test, david	Ankota, Support	Wed, 2019/05/01	2h 0m	1.00	\$0.00	\$120.00	YES	Visit Items
<input checked="" type="checkbox"/>	26628095-028233c8-133	Private Pay	Test, david	Ankota, Support	Thu, 2019/05/02	2h 0m	1.00	\$0.00	\$120.00	YES	Visit Items
<input checked="" type="checkbox"/>	34929604-983a4b07	Private Pay	Client, Test	Caregiver, Carrie	Fri, 2019/11/01	1h 0m	1.00	\$0.00	\$60.00	YES	Visit Items
<input checked="" type="checkbox"/>	34928606-a83b438a	Private Pay	Client, Test	Caregiver, Carrie	Mon, 2019/11/18	1h 0m	1.00	\$0.00	\$60.00	YES	Visit Items



Closed visits can then be previewed and reviewed for issues, such as a zero rate, and then investigated and corrected.

When ready to bill, click the Create Invoice button.

## RE-DELIVERY

### **IMPORTANT NOTE:**

***the following applies in New Hampshire only AFTER the visits have been billed.***

***Unbilled visits can NOT be exported to Authenticare per the state***

***(as all exported visits require being billable).***

### Data Exports/Single Visit Export Correction

Individual visits can be exported manually from the Visit Approval Dashboard using the Export Visit button inside the visit details. Data exports are set up during your implementation or as the new data exports are required by the state. Generally, initial data delivery occurs either as your visit status changes at regular intervals, OR upon billing automatically, but visits can be exported manually as well. Some companies do this because they do not use Ankota billing, and others use the manual export after correcting rejected visits. See your [state workflow](#) for further details on when your data is exported.

***Please note the individual visit Export button is the ONLY way to re-export a **previously accepted visit**.***

Visit Detail Report

Visit Created By Phone

Client Name: Edgar Degas

Caregiver:

Care Plan: 0

Visit Type: Facility Shift

Visit Id: 56705878-7f5508e5

Scheduled Arrival Date/Time: 03/09/2022 10:15 AM

Scheduled Departure Date/Time: 03/09/2022 11:15 AM

EVV Arrival:

EVV Departure:

Corrected Arrival Date/Time: 03/09/2022 10:15 AM

Corrected Departure Date/Time: 03/09/2022 11:15 AM

Scheduled Time: 1 hours 0 minutes

Travel Time: 0 minutes

Visit Time: 1 hours 0 minutes

Travel Mileage: 0 miles

Billable Time: 1 hours 0 minutes

Admin Time: 0 minutes

Payable Time: 1 hours 0 minutes

Errand Miles: 0

Visit Notes:

Rework Notes:

Signatures: Client Arrival Signature

View History

Visit Status: Needs Approval

Approve Visit

Care Plan Items

Export Visit

Send for Rework

This individual visit export function on the Visit Approval Dashboard is most useful when:

- the visit needs to be re-sent without any alteration
- when the visit needs to be sent with a Reason code or Action code change
- when the visits needs to be re-send after having [a new visit ID assigned to it](#) (typically a Netsmart issue)

Please note key information on the visit such as date, time, or visit type cannot be changed if the visit has a completed payroll or invoice.

**For example,** a visit has the wrong reason code and receives a rejection response. To adjust the reason code,

- Open the Visit Approval Dashboard
- Filter for the appropriate visit (likely by searching by Visit ID)
  - Don't forget to expand the date range
  - Don't forget to set visit status to All

- Click Approve Visit
- Select the Reason and/or Action code(s) needed
- Approve

Approval Notes/Comments
Close

Approved By:

Approved Date: 1/21/2022 6:15:17 PM

Approved Reason:

-- Select Reason --

☐ Select all

☐ ACTION (VISIT EDIT) - 11 - Confirmed visit with outside entity and documented

☐ ACTION (VISIT EDIT) - 12 - Confirmed with the Member or the Member's family member/representative and documented (this service cannot be billed)

☐ ACTION (VISIT EDIT) - 13 - New attendant assigned to Member

☐ ACTION (VISIT EDIT) - 14 - New visit scheduled

Then, to export the individual visit (while still in the same location in the VAD),

- Click the Export Visit button

Visit Detail Report

Visit Created By Phone

Client Name:

Edgar Degas

Caregiver:

Care Plan:

0

Visit Type:

Facility Shift

Visit Id:

56705878-7f5508e5

Scheduled Arrival Date/Time:

03/09/2022 10:15 AM

Scheduled Departure Date/Time:

03/09/2022 11:15 AM

EVV Arrival:

Corrected Arrival Date/Time:

03/09/2022 10:15 AM

EVV Departure:

Corrected Departure Date/Time:

03/09/2022 11:15 AM

Scheduled Time:

1 hours 0 minutes

Travel Time:

0 minutes

Visit Time:

1 hours 0 minutes

Travel Mileage:

0 miles

Billable Time:

1 hours 0 minutes

Admin Time:

0 minutes

Payable Time:

1 hours 0 minutes

Errand Miles:

0

Visit Notes:

Rework Notes:

Send for Rework

Signatures:

Client Arrival Signature

View History

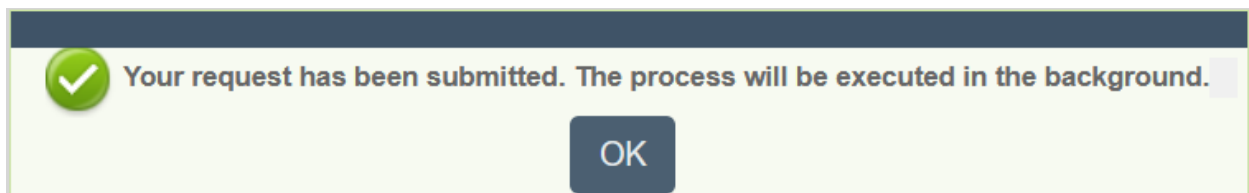
Visit Status: Needs Approval

Approve Visit

Care Plan Items

Export Visit

You will then receive the following confirmation pop-up:



## Multiple Visit Export Correction

Just as individual visits can be exported manually, groups of visits can be mass exported from the Visit Approval Dashboard. Data exports are set up during your implementation or as the new data exports are required by the state. Generally, initial data delivery occurs either as your visit status changes at regular intervals, OR upon billing. See your [state workflow](#) for further details on when your data is exported.

This mass export function is most useful when:

- the visits need to be re-sent without any alteration
- when the visits were previously rejected due to an error by an aggregator/clearinghouse, and that error has been corrected

For example, one of the most common corrections is that a group of visits was rejected due to the caregiver not having been assigned an ID. To fix that, an admin would open the caregiver profile, assign the ID, and save. For Sandata or HHAX, the caregiver profile would need to be exported first. (Netsmart does not require a caregiver profile.) Then on the Visit Approval Dashboard, the admin could filter for that caregiver's visits and re-export them.

To export a group of visits,

- Open the Visit Approval Dashboard
- Filter for the appropriate visits
- Select the visits using the check all button
- Click the Export button
- You will see a confirmation pop-up ("Success") at the top right



## Visit Approval Dashboard

Client --- All --- v

Date From 10/1/2022

Date To 10/27/2022

Violations -- All -- v

Visit Arrival Method --- All --- v

Caregiver Caregiver, Val v

Visit Closure Method --- All --- v

Visit Status --- All --- v

Approval Type --- All --- v

Visit Type --- All --- v

Visit ID

**SUCCESS**  
Your request has been submitted. The process will be executed in the background.

Run Rules

View Report

	Caregiver	Client Name	Care Plan	Visit Type	Arrival Date/Time	Departure Date/Time	Visit Status	Approval Type	
<input checked="" type="checkbox"/>	Caregiver, Val	Degas, Edgar	Edgar Degas	Personal Care - In Home	10/14/2022 09:02 AM	10/14/2022 09:03 AM	Approved	N/A	
<input checked="" type="checkbox"/>	Caregiver, Val	Degas, Edgar	Edgar Degas	Personal Care - In Home	10/17/2022 07:38 AM	10/17/2022 09:38 AM	Approved	N/A	
<input checked="" type="checkbox"/>	Caregiver, Val	Degas, Edgar	Edgar Degas	Facility Shift	10/17/2022 07:59 AM	10/17/2022 08:31 AM	Approved	N/A	
<input checked="" type="checkbox"/>	Caregiver, Val	Degas, Edgar	Edgar Degas	Personal Care - In Home	10/25/2022 04:00 AM	10/25/2022 08:00 AM	Approved	N/A	
<input checked="" type="checkbox"/>	Caregiver, Val	Degas, Edgar	Edgar Degas	Respite Care	10/25/2022 08:00 AM	10/25/2022 11:15 AM	Approved	N/A	

Mark As Approved

Export