

QM DESK GUIDE

SOC Quality Management ♦ Julia Soto, Manager ♦ October 26, 2023

Monitoring and Correcting Billing Errors Instructions

Addressing Billing Errors

What are they? Billing Errors are errors that occur for various reasons (see types of errors below) and prevent service notes from being finalized and pushed for claiming to the state. These can be monitored and addressed one of two ways.

1. Services Needing Attention Widget
2. CalMHSa Service Error Report (My office)

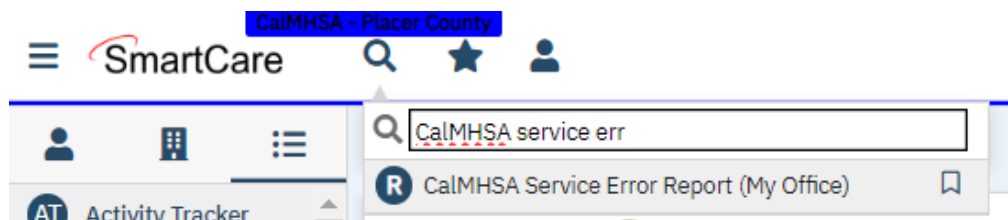
Services Needing Attention Widget

1. From the SmartCare user dashboard, use the “Services Needing Attention Widget to identify which services are showing up with errors and what type of error is occurring.
2. Click on the link with the number. This will take you to a list page of the specific services needing attention.



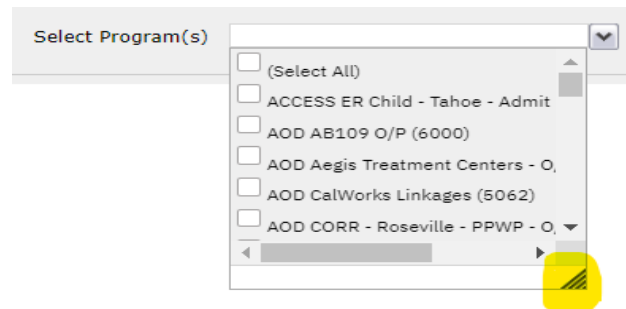
CalMHSa Service Error Report (My office)

1. In Search bar, search for “CalMHSa Service Error Report (My office)”

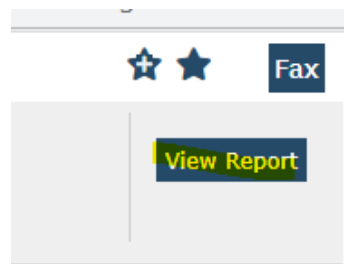


2. Enter “From” date that you wish to start your search. Note: type a date or select date from calendar.

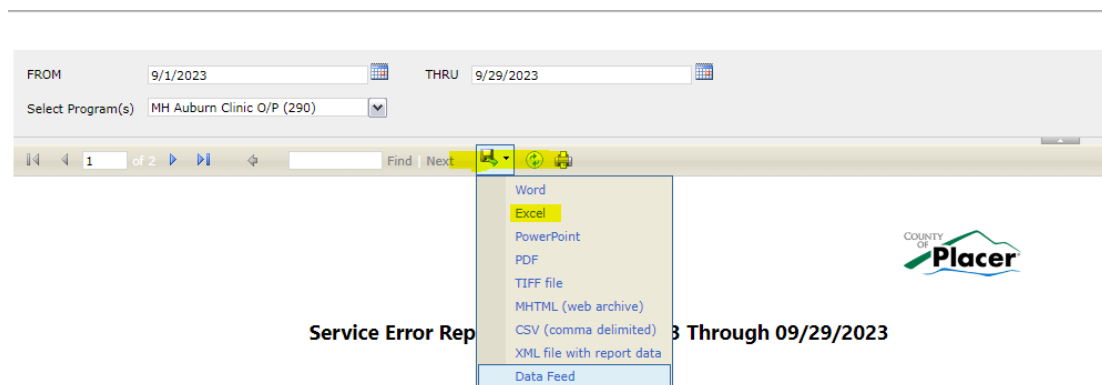
3. You must enter through date.
4. Select your program from drop down. Multiple programs can be selected.
Note: by dragging the lower right corner, the viewing screen is expanded.



5. In the top right corner, click "View Report" button.



6. To export the report to excel, click on the "Export Drop Down Menu" icon in the top left corner and select "Excel". Exporting to Excel will allow you to filter the report by staff.



Types of Errors to be Monitored by Program Staff and Supervisors

1. Billing Diagnosis required for completing the service: A LPHA must enter a diagnosis for the program the service is being provide. The date of the diagnosis must be on or before the date of the service.
2. Must have a signed note before completing a service: Sign the note.

Types of Errors to be Monitored by Quality Management

1. Unable to find a matching rate for the selected procedure: Several reasons for this error. Placer QM is responsible for monitoring addressing these billing errors.
 - a) The clinician does not have a license/degree listed on the license/degree tab in staff/user.
Fix: Contact PlacerQM@placer.ca.gov to make sure the clinician's license/degree is listed on the staff details screen.
 - b) The procedure code doesn't have a service area Plan (Mental Health) or (Substance Abuse) associated with it.
Fix: Contact PlacerQM@placer.ca.gov to modify the procedure code to add the service area Plan.
 - c) The level of care modifier doesn't exist for the procedure code.
Fix: Contact PlacerQM@placer.ca.gov to check the procedure code against programs.
 - d) The procedure code requires a minimum number of minutes before a charge can be calculated. (e.g., a clinician created a TCC/ICC service note for 5 minutes of service. For this service to get pushed it needs a minimum of 15 minutes.
Fix: Talk with your supervisor on how to make the service clinically relevant to capture the minimum units of service needed for this procedure code.
 - e) The procedure code has maximum minutes that can be billed (e.g., if the procedure code minutes maximum is 90 minutes and the service is 100 minutes, it will not calculate the rate.
Fix: SmartCare should automatically. If you get this error, email PlacerQM@placer.ca.gov.
2. Financial Information has not been completed for this client: This error can be disregarded and is addressed by the fiscal department.