

Third Party Invoice Billing



This manual is designed to detail the Third Party Invoice Billing module within eTHOMAS. This document will cover how to set eTHOMAS up for Third Party Billing and how to use the module.

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Third Party Invoice Billing Introduction

eTHOMAS has had the ability to create Invoices for many years. Over time we have improved and modified the Invoice production and preparation. This document will detail how to set up your system for Invoice and Third Party Billing. Invoices allow the user to send a bill to an entity on an invoice form. Third Party Billing has the functionality of Invoices and allows the user to specify a different Fee Schedule based upon Financial, Insurance, and Procedure code.

Why use an Invoice?

Sometimes it is necessary to send a bill to an entity in a format other than on a CMS-1500 claim form. These are typically entities in which the provider office has a contract with such as Skilled Nursing Homes, Prisons, Hospice Providers, Attorneys, Supply Companies, etc.

An Invoice is a bill that will group patients together by a particular entity that details the patients, procedure codes, diagnosis, and charge information.

Can I produce regular claims and Invoices from the same system?


Yes, you may still produce regular claims out of your system as you normally do. If you are using Invoices and/or Third Party billing and preparing regular claims, you need to create a separate financial code for those payers (which will be explained later in this document). **If your office chooses to use Invoices and Third Party within the same system, we recommend using different Financial Codes for each type. An example would be 'IN' Financial Code for regular Standard Invoices and 'TP' for Third Party Billing Invoices. In addition, the System Setting InvoicePerClaim, which gives users the ability to separate invoices by claim should not be used with Third Party Billing.**

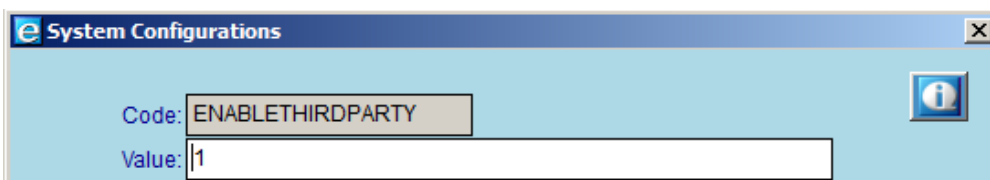
Set Up for Third Party Payors

There will be some initial setup that will need to take place prior to sending Third Party invoices out of eTHOMAS.

System Setting Activation

Activate the System Setting EnableThirdParty with a value of 1. Access the System Settings through Utility | Settings |

System Settings. Click the plus sign  to add a new setting. EnableThirdParty should not be used with the System Setting InvoicePerClaim.



The screenshot shows a window titled "System Configurations" with a light blue background. On the left, there are labels "Code:" and "Value:". The "Code:" field contains the text "ENABLETHIRDPARTY" and is highlighted with a grey selection bar. The "Value:" field contains the number "1". To the right of the "Value:" field is a small blue square icon with a white lowercase 'i' inside. The window has a standard Windows-style title bar with a close button (X) in the top right corner.

Financial Code Setup

If you are using Third Party Billing in an existing directory and sending out bills to insurance companies on a CMS-1500 paper claim form, you will need to create a new Financial Code for the Third Party Payors. If all your office does is Third Party Billing OR you do not send out CMS-1500 paper claim forms for that Financial Code you will not need to set up a new Financial Code.

Genius Solutions suggests using a Financial Code of TP for Third Party Billing Invoice, using an Insurance Type of Commercial, leaving the Clearinghouse blank since this Financial Code will be used for Invoices and will not be sent to a clearinghouse. Set the Paper Form as Invoice. Set up the Insurance Code for the entity/company in which the patient has insurance. This could be a regular insurance company since the Invoice will be sent to the company assigned within the Third Party Payors (explained next).

Setting up an additional Insurance Code is not required, but you may wish to do so to reflect the Responsible Payor.

Third Party Payor Code Files

Activating the System Setting will give you access to the Third Party Payors within the Code Files. Once the setting is activated, from Code Files | Other | Third Party Payors, add the Payors in which you will be sending invoices. Once the code has been saved, enter back into the code to access the Fee Schedule. The Fee Schedule is where the Financial Codes and Insurance Codes will be entered along with the charge for the specific procedure codes being billed.

Fee Schedule

If there is a different Fee Schedule for this Payor, you may enter Financial Code and Insurance Code along with the Procedure Codes that have a different Fee Schedule. Select the Financial and Insurance Code along with the Procedure Code. Indicate the charge of the procedure code. **Note: This is typically a different Fee Schedule than your Procedure Code File.**

Alternate Fee

Financial Code:
Insurance Code:
Procedure Code:
Charge:

Alternate Fee

Financial Code:
Insurance Code:
Procedure Code:
Charge:

Attaching Policies to the Patient


Attach the Policy to be used for the Third Party Billing to the Patient Information.

Attaching Third Party Payors to a Patient

Click on Third Party Information from the Patient | Information.


Information

Patient
Import
Policies
Benefits
New
Family List
New Family Member
Third Party Payors

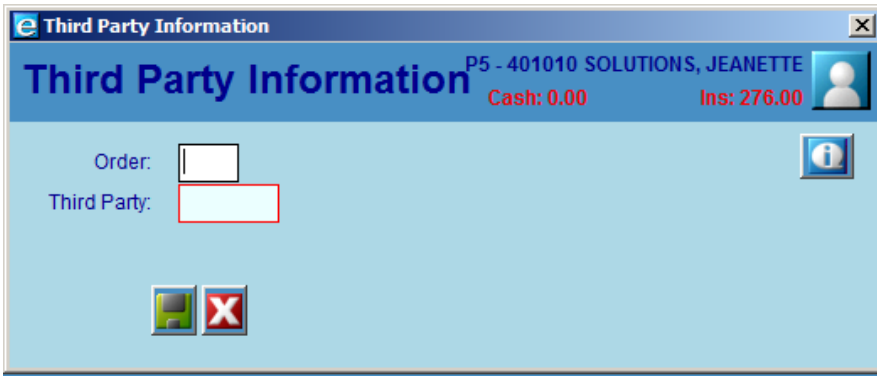
Click on the Plus  sign to add a new Third Party.

Third Party Payor List

P5-401010 SOLUTIONS, JEANETTE
Cash: 0.00 Ins: 276.00


☐ Show All Payors

Order	Payor Name
1	SUNNYBROOK NURSING CENTER





Third Party Information

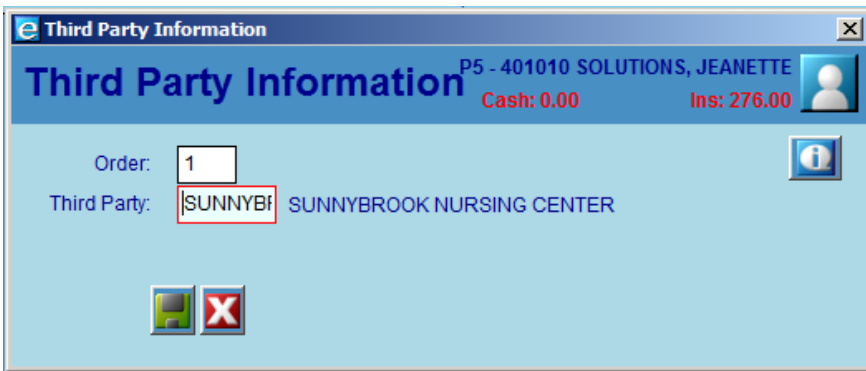
P5 - 401010 SOLUTIONS, JEANETTE
 Cash: 0.00 Ins: 276.00

Order:

Third Party:

Assign the order with a number. The number represents where it will be listed within the drop-down when posting charges. You may have multiple Third Party Payors per patient.





Third Party Information

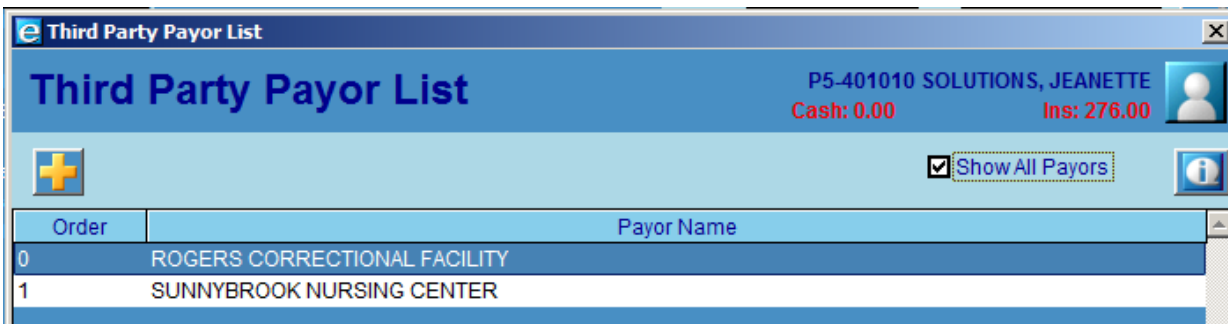
P5 - 401010 SOLUTIONS, JEANETTE
 Cash: 0.00 Ins: 276.00

Order:

Third Party:



 

To discontinue a Third Party from within the Patient, put a 0 in the Order or click the delete button. Clicking delete will put a zero (0) in the Order of the Payor. The Third Party Information will still be available, but will not appear as active. You may view all of the patient's Third Party Information by selecting "Show All Payors".



Third Party Payor List

P5-401010 SOLUTIONS, JEANETTE
 Cash: 0.00 Ins: 276.00

 ☒ Show All Payors 

Order	Payor Name
0	ROGERS CORRECTIONAL FACILITY
1	SUNNYBROOK NURSING CENTER

Posting Charges

Once eTHOMAS has been set up for Third Party Billing, Third Party Payors may be attached when Posting Charges. From the Post Charges screen, notice there is drop-down for Third Party. The Third Party drop-down will be present on any patient who has active Third Party Payor information. Use the drop-down to select the appropriate Third Party.

The screenshot shows the 'eTHOMAS Posting Charges' window. The title bar includes the eTHOMAS logo and window controls. The main area has a blue header with 'Post Charges' and patient details '401010 SOLUTIONS, JEANETTE'. Below this, financial information is displayed: 'Copay: \$0.00', 'Cash: 0.00', and 'Ins: 0.00'. The form is organized into several sections. On the left, there are dropdown menus for 'Primary', 'Secondary', and 'Tertiary' payors, each followed by a 'DX' code field. The 'Third Party' dropdown is highlighted with a red box, showing 'SUNNYBROOK NURSING' as the selected option. To the right of these fields, there are more dropdowns for 'Claim Type', 'Location', 'Doctor', 'Header', 'Bill Type', and 'Doc Ind'. At the bottom of the window, there are buttons for 'Ins Remarks', 'Cln Notes', 'Profiles', and 'Last Claim', along with an 'ICD10' checkbox.

Once you have selected the desired Third Party, post charges as you normally would. If there is more than one Third Party Payor in the drop-down and charges are posted using one Third Party, the Fee Schedule will load from the selected Third Party. If during the Post Charges process, the Third Party Payor is changed on the claim, the line items on the claim will need to be deleted and reposted to pull the Fee Schedule from the selected Third Party.

Once a Third Party Invoice is created, a label will be displayed on the Patient Information screen, below the Cash and Insurance Balance that Third Party Attached. This can be helpful in alerting users that the patient has Third Party Invoices attached to their account. Currently if the System Setting PatGenInfo is activated with a value of 2, the message that a Third Party Attached will be displayed on patients that have Third Party Invoices.

Third Party Attached

The Different Types of Invoices Produced

By default, Invoices will print separately based upon Location. Claims will be grouped on the same Invoice with the same location and same payer (Insurance Code). To separate Invoices by patient claim, activate the System Setting InvoicePerClaim. There are 3 types of invoices that may be produced from eTHOMAS. These types are controlled by a System Setting called InvoiceType.

When Invoices are printed they will appear on the Billing | Claims screen as Invoice.

Step 1 Prebilling	Use the Prebilling to produce an onscreen or hardcopy record of the invoices that are being prepared. Use the drop-down to specify your choice. Choose “Show Detail” to list the transactions from each claim.
Step 2 Alignment	Not used for Invoices as the Invoice does not print on a form so there is no need to align it.
Step 3 Billing	Print to Screen to view the Invoice before printing to the Printer. Print the Invoice to the Printer using the To drop-down menu. Choose either a single Invoice to prepare or All Invoices.

Once the Invoices have been printed to the printer, eTHOMAS will prompt the user to update the claims in the group. Updating the claims will mark the claims as Billed and permanently assign the Invoice Number to the claim.

When an invoice is prepared, printed, and updated, the invoice number in which it was assigned is locked. When an invoice is locked, it cannot be sent out again through Billing | Claims because the Invoice Number has already been assigned. See the section on Reprinting Invoices and Unlocking Invoices.

Invoice Type 1 with EnableThirdParty activated

Invoice Type 1, activated with the System Setting InvoiceType with a value of 1, is the Standard Invoice. Here is an example of a Standard Invoice with EnableThirdParty activated with a value of 1. The pages of the Invoice are separated by patient.

INVOICE

Printed on 08/03/2015 Monday 17:02:44

Invoice#
60-100

GENIUS SOLUTIONS

7177 MILLER DRIVE
WARREN MI 48092
Tax ID: 333223333

SUNNYBROOK NURSING CENTER

Attn: SUZY SMITH
12345 SUNNYVILLE LANE
SUNNYVILLE MI 48044-1234

Name/AcctNo SSN
SOLUTIONS, JEANETTE F - 401010 * -0000**

Claim No.	Diagnosis	Date	Procedure	Description	Qty	Charge
12424	C92.Z1	07/28/2015	99213	EP EXPANDED	1	92.00
		07/28/2015	11422	EXCISION LESION 1.0 CM	1	240.00
12434	E08.10	08/03/2015	99213	EP EXPANDED	1	92.00
SOLUTIONS, JEANETTE F Totals:						424.00
Total Balance Due:						424.00

INVOICE

Printed on 08/03/2015 Monday 17:03:28

Invoice#
60-100

GENIUS SOLUTIONS

7177 MILLER DRIVE
WARREN MI 48092
Tax ID: 333223333

SUNNYBROOK NURSING CENTER

Attn: SUZY SMITH
12345 SUNNYVILLE LANE
SUNNYVILLE MI 48044-1234

Name/AcctNo SSN
SOLUTIONS, LIAH - 150 * -3333**

Claim No.	Diagnosis	Date	Procedure	Description	Qty	Charge
12435	E08.11	08/03/2015	99213	EP EXPANDED	1	92.00
		08/03/2015	11100	BIOPSY SKIN	1	150.00
SOLUTIONS, LIAH Totals:						242.00
Total Balance Due:						242.00

Invoice Title This is the title of the Invoice, it will always display as Invoice.

Invoice# The Invoice number. Each Invoice has a unique number. The System Setting Invoice_No will denote the last Invoice Number used.

Claim Location The Location Name, Address, and TaxID attached to the patient claim. To suppress the TaxID from the Location, activate the System Setting InvoiceNoTaxID with a value of 1.

Third Party Payor The Third Party Name, Attn Line, Address line, City, State, and ZIP attached to the patient claims.

Name/AcctNo The patient's Last Name, Suffix, First Name, Middle Name, and Account Number.

SSN The last four digits of the patient Social Security Number (SSN). Activate the System SSOnInvoice to display the full Social Security Number. By default, the last four digits will display.

Claim No. The Claim number for that invoice for the patient listed.

Diagnosis The first four diagnosis codes from the patient claim.

Date The Date of Service for the transaction from the patient claim.

Procedure The Procedure code for the transaction from the patient claim.

Description The Procedure code Description for the transaction from the patient claim.

Qty The Qty (Quantity) for the transaction line from the patient claim.

Charge The charge amount for the transaction line from the patient claim.

Totals The totals for that patient claim invoiced.

Total Balance Due The total balance from all the claims for the invoice created.

Invoice Type 2 with EnableThirdParty activated

Invoice Type 2, activated with the System Setting InvoiceType with a value of 2, is a variation of the Standard which includes the patient's date of birth and the claim doctor. Here is an example of Invoice Type 2 with EnableThirdParty activated with a value of 1. The pages of the Invoice are separated by patient.

INVOICE		Printed on 08/03/2015 Monday 17:00:31		Invoice# 58-100	
GENIUS SOLUTIONS 7177 MILLER DRIVE WARREN MI 48092 586-751-9080 Tax ID: 333223333		SUNNYBROOK NURSING CENTER Attn: SUZY SMITH 12345 SUNNYVILLE LANE SUNNYVILLE MI 48044-1234			
Name/AcctNo		SSN	DOB	Provider	
SOLUTIONS, JEANETTE F - 401010		*** - ** -0000	11/19/1967	SHELDON COOPER	
Claim No.	Diagnosis	Date	Procedure	Description	Qty Rate Charge
12424	C92.Z1	07/28/2015	99213	EP EXPANDED	1 92.00 92.00
		07/28/2015	11422	EXCISION LESION 1.0 CM	1 240.00 240.00
12434	E08.10	08/03/2015	99213	EP EXPANDED	1 92.00 92.00
SOLUTIONS, JEANETTE F Totals:					424.00
Total Balance Due:					424.00

INVOICE		Printed on 08/03/2015 Monday 17:01:51		Invoice# 58-100	
GENIUS SOLUTIONS 7177 MILLER DRIVE WARREN MI 48092 586-751-9080 Tax ID: 333223333		SUNNYBROOK NURSING CENTER Attn: SUZY SMITH 12345 SUNNYVILLE LANE SUNNYVILLE MI 48044-1234			
Name/AcctNo		SSN	DOB	Provider	
SOLUTIONS, LIAH - 150		*** - ** -3333	08/12/1964	ETHAN CARTER	
Claim No.	Diagnosis	Date	Procedure	Description	Qty Rate Charge
12435	E08.11	08/03/2015	99213	EP EXPANDED	1 92.00 92.00
		08/03/2015	11100	BIOPSY SKIN	1 150.00 150.00
SOLUTIONS, LIAH Totals:					242.00
Total Balance Due:					242.00

Invoice Title This is the title of the Invoice, it will always display as Invoice.

Invoice# The Invoice number. Each Invoice has a unique number. The System Setting Invoice_No will denote the last Invoice Number used.

Claim Location The Location Name, Address, and TaxID attached to the patient claim. To suppress the TaxID from the Location, activate the System Setting InvoiceNoTaxID with a value of 1.

Third Party Payor The Third Party Name, Attn Line, Address line, City, State, and ZIP attached to the patient claims.

Name/AcctNo	The patient's Last Name, Suffix, First Name, Middle Name, and Account Number.
SSN	The last four digits of the patient Social Security Number (SSN). Activate the System SSOnInvoice to display the full Social Security Number. By default, the last four digits will display.
DOB	The Date of Birth from the Patient Information.
Provider	The Claim Doctor Name (Full Name) from the patient claim.
Claim No.	The Claim number for that invoice for the patient listed.
Diagnosis	The first four diagnosis codes from the patient claim.
Date	The Date of Service for the transaction from the patient claim.
Procedure	The Procedure code for the transaction from the patient claim.
Description	The Procedure code Description for the transaction from the patient claim.
Qty	The Qty (Quantity) for the transaction line from the patient claim.
Rate	The Charge amount from the Procedure Code file.
Charge	The Charge amount for the transaction line from the patient claim.
Totals	The totals for that patient claim invoiced.
Total Balance Due	The total balance from all the claims for the invoice created.

Invoice Type 3 with EnableThirdParty activated

Invoice Type 3, activated with the System Setting InvoiceType with a value of 3, combines patients with the same Third Party Payor onto one Invoice. Here is an example of Invoice Type 3 with EnableThirdParty activated with a value of 1.

INVOICE		Printed on 08/03/2015 Monday 16:58:56		Invoice# 56-100	
GENIUS SOLUTIONS 7177 MILLER DRIVE WARREN MI 48092 Tax ID: 333223333			SUNNYBROOK NURSING CENTER Attn: SUZY SMITH 12345 SUNNYVILLE LANE SUNNYVILLE MI 48044-1234		
AETNA US HEALTHCARE Name/AcctNo SSN SOLUTIONS, JEANETTE F - 401010 *** - -0000					
Claim No.	Diagnosis	Date	Procedure	Description	Qty Charge
12424	C92.Z1	07/28/2015	99213	EP EXPANDED	1 92.00
		07/28/2015	11422	EXCISION LESION 1.0 CM	1 240.00
12434	E08.10	08/03/2015	99213	EP EXPANDED	1 92.00
SOLUTIONS, JEANETTE F Totals:					424.00
Total Balance Due:					424.00
BLUE CROSS OF MI Name/AcctNo SSN SOLUTIONS, LIAH - 150 *** - -3333					
Claim No.	Diagnosis	Date	Procedure	Description	Qty Charge
12435	E08.11	08/03/2015	99213	EP EXPANDED	1 92.00
		08/03/2015	11100	BIOPSY SKIN	1 150.00
SOLUTIONS, LIAH Totals:					242.00
Total Balance Due:					666.00

Invoice Title	This is the title of the Invoice, it will always display as Invoice.
Invoice#	The Invoice number. Each Invoice has a unique number. The System Setting Invoice_No will denote the last Invoice Number used.

Claim Location	The Location Name, Address, and TaxID attached to the patient claim. To suppress the TaxID from the Location, activate the System Setting InvoiceNoTaxID with a value of 1.
Third Party Payor	The Third Party Name, Attn Line, Address line, City, State, and ZIP attached to the patient claims.
Insurance Name	The Insurance Code Name attached to the patient claim.
Name/AcctNo	The patient's Last Name, Suffix, First Name, Middle Name, and Account Number.
SSN	The last four digits of the patient Social Security Number (SSN). Activate the System SSOnInvoice to display the full Social Security Number. By default, the last four digits will display.
Claim No.	The Claim number for that invoice for the patient listed.
Diagnosis	The first four diagnosis codes from the patient claim.
Date	The Date of Service for the transaction from the patient claim.
Procedure	The Procedure code for the transaction from the patient claim.
Description	The Procedure code Description for the transaction from the patient claim.
Qty	The Qty (Quantity) for the transaction line from the patient claim.
Charge	The charge amount for the transaction line from the patient claim.
Totals	The totals for that patient claim invoiced.
Total Balance Due	The total balance from all the claims for the invoice created.



eTHOMAS Note: With EnableThirdParty activated, the Invoice Number will end with a dash and a number.

Invoice#
8-0

Reprinting Invoices

When an invoice is prepared, printed, and updated, the invoice number in which it was assigned is locked. When an invoice is locked, it cannot be sent out again through Billing | Claims because the Invoice Number has already been assigned. To Reprint an Invoice, use the Reprint Invoice function from Billing | Reprint Invoice; highlight the desired Invoice and click Reprint w/ Pay or Reprint w/o Pay.

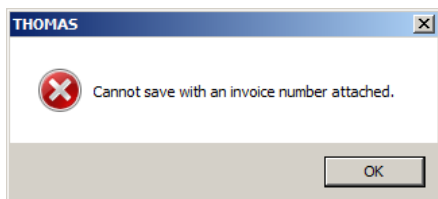
Use the Reprint Invoice to obtain a list of Invoices that have a balance. There are some options to choose from within the Reprint Invoice area.

Reprint w/ Pay	Select to Reprint the Invoice with Insurance Payments, Participating Adjustments, and Transfer Balances. Use this feature to reprint the original invoice with any insurance payments.	Reprint w/ Pay
Reprint w/o Pay	Select to Reprint the Invoice without Insurance Payments, Participating Adjustments, and Transfer Balances. Use this feature to reprint the original invoice as it went out the first time without any payments.	Reprint w/o Pay
Show All	Select to Show All invoices. By default, unpaid invoices are displayed. Selecting Show All will display unpaid and paid invoices.	<input type="checkbox"/> Show All

Unlocking Invoices

As stated earlier, invoice numbers are locked by default. When an invoice is locked the transactions attached to the Invoice can't be deleted or changed. You may activate the System Setting UnlockInvoice with a value of 1 to get a delete button and the ability to edit transactions attached to Invoices. Genius Solutions does not recommend deleting information from the system, but understands that in some cases it may be necessary.

Example of the message received when saving information on a transaction that is tied to an invoice.



System Settings for Third Party Billing Invoices

EnableThirdParty	This setting will allow for the creation of a separate fee schedule based upon Financial Code, Insurance Code, and Procedure code for Third Party Payors. These Third Party Payors may then be used to attach when posting charges to create an invoice grouped together by the Third Party Payor. To enable this setting, enter the value as 1, otherwise leave blank.
Invoice_No	The last invoice number used.
InvoiceNoTaxID	This setting will suppress the Location TaxID from printing on the Invoice. To enable this setting, enter the value as 1, otherwise leave blank.
InvoiceType	This setting will activate one of the three invoices. To enable this setting, enter the Invoice Type with one of the following values: 1, 2, or 3, otherwise leave blank. 1--Standard Invoice, 2--Claim Provider, Patient DOB, and Rate Invoice, 3--Third Party Invoice.
SSOnInvoice	This setting will display/print all digits of the Social Security Number on the Invoice, otherwise it produces ***-**- and the last four digits. To enable this setting, enter the value as 1, otherwise leave blank.
UnlockInvoice	This setting will unlock an invoice in order to make changes to or delete items from a printed/locked invoice. To enable this setting, enter the value as 1, otherwise leave blank.