



CompuGroup™
Medical

Roll Up Billing

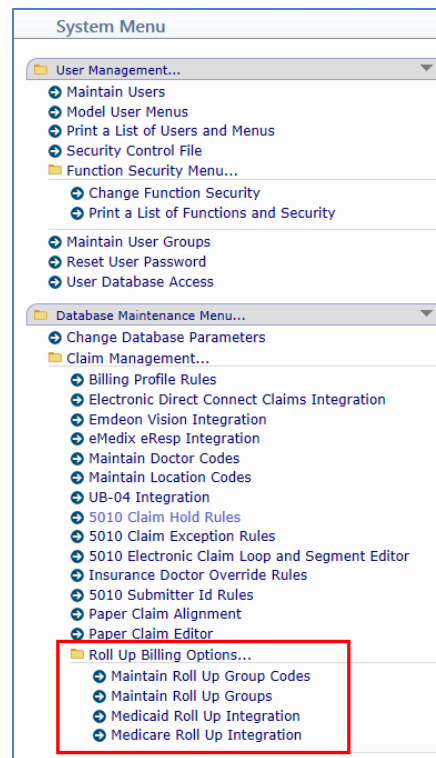
January 2018

CGMwebPRACTICE™
Fully Web-Based Practice Management Suite

ROLL UP BILLING

Roll Up Billing (System, Database Maintenance Menu, Claim Management)

New functions have been added to standardize the process of setting up Roll Up Billing to meet each client's specific needs.



The following steps should be performed in the order shown to accurately setup the required information for Roll Up Billing.

1. Create a Roll Up Group Code using the *Maintain Roll Up Group Codes* function.
2. Select the **Doctor**, **Insurance Carrier**, and **Location** codes that will determine which procedures are required to be rolled up, using the *Maintain Roll Up Groups* function.
3. Complete the Roll Up Integration settings for the insurance carrier(s) using the *Medicaid* or *Medicare Roll Up Integration* function.

Maintain Roll Up Group Codes

With this function you can review information for a specific code, add a new code into the table, change the information for existing codes, inactivate or reactivate a code, or print the table.

Maintain Roll Up Group Codes

Roll Up Group Code	MD GROUP ✓
Roll Up Group Description	MEDICAID GROUP ✓

Maintain Roll Up Groups

With this function you can select the **Doctor**, **Insurance Carrier**, and **Location** codes that will determine which procedures are required to be rolled up. Select the **Roll Up Group Code** you want from the **Roll Up Group Code** list.

Maintain Roll Up Groups

Roll Up Group Code	MEDICAID GROUP (MD GROUP) ▼
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If there are any previously stored codes for this group, the Group Code Summary screen will list them. The **Insurance Code** and **Carrier Name** will display in the first two columns. The **Doctor Code** and **Doctor Name** will display in the third and fourth columns and the **Location Code** and **Location Name** will display in the last two columns.

Maintain Roll Up Groups						System Manager EASTSIDE MEDICAL (1)
Maintain Doctors Maintain Carriers Maintain Locations	Group: MEDICAID GROUP (MD GROUP)					
Insurance Code ▼	Insurance Carrier	Doctor Code	Doctor Name	Location Code	Location Name	
AHC	AHCCCS HEALTH CHOICE	1	CATHY CASTNER, MD, DO	1	MAIN OFFICE	
				GSI	GOOD SAM IP	
				UB1	UB LOCATION 1	

You can edit, delete, or review the **Doctor**, **Insurance Carrier**, and **Location** codes for the Roll Up Group Code using the functions provided in the Action Column. These functions do not have to be accessed in any particular order.

Since the same general process is used for Maintaining **Doctors**, **Carriers**, and **Locations**, to prevent duplication only one example is provided below to demonstrate the **Maintain** Action Column functions.

Maintain Doctors

After clicking the **Maintain Doctors** function, the screen will refresh and list any previously stored codes for this group. You can **Add** or **Remove** codes using the functions in the Action Column.

Maintain Roll Up Groups		System Manager Eastside Medical (1)
Add Doctor Add All Doctors Remove All Doctors History	Doctors in the Group: MEDICAID GROUP (MD GROUP)	
Doctor Code ▼	Doctor Name	
1	Katy Castner MD, DO	
2	ANDREW BAKER, MD	
AND	RICHARD W. ANDERSON, MD	

You can also display an audit trail showing the date and time codes were added or removed, the user who performed the Action, and a description of which codes were added or removed, using the **History** function in the Action Column.

Maintain Roll Up Groups		System Manager Eastside Medical (1)		
Roll Up Group Code: MEDICAID GROUP (MD GROUP)				
Date ▼	Time	User	Action	Description
06-26-2013	12:20P	MGR	Added	Doctor Code (AND) to the Group
06-26-2013	12:21P	MGR	Added	All Doctors to the Group
06-26-2013	12:21P	MGR	Removed	All Doctors from the Group
06-26-2013	12:21P	MGR	Added	All Doctors to the Group
06-26-2013	12:21P	MGR	Removed	All Doctors from the Group
06-26-2013	12:21P	MGR	Added	Doctor Code (1) to the Group
06-26-2013	02:33P	MGR	Removed	All Doctors from the Group
06-26-2013	03:26P	MGR	Added	Doctor Code (1) to the Group
06-26-2013	10:01P	MGR	Added	Doctor Code (AND) to the Group
06-26-2013	10:06P	MGR	Added	Doctor Code (2) to the Group

After you have saved the necessary codes, click **Cancel** to return to the Group Code Summary screen. Confirm that you have selected and stored all of the required codes for your practice and click **Proceed**.

Next, you will need to fill out the *Medicaid* or *Medicare Integration* settings (or both) depending on your practice's needs.

Medicaid Roll Up Integration

Type or select the **Roll Up Group Code** you want from the **Roll Up Group Code** list.

Medicaid Roll Up Integration

Roll Up Group Code	<input style="width: 100%;" type="text" value="MEDICAID GROUP (MD GROUP)"/>
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An **Effective Date** will be required for the Roll Up Group Code. You can select an existing date from the **Effective Date** list or create a new effective date by selecting '*New Effective Date*.'

Medicaid Roll Up Integration

Roll Up Group Code	<input style="width: 100%;" type="text" value="MEDICAID GROUP (MD GROUP)"/>
Effective Date	<input style="width: 100%;" type="text"/> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> <div style="text-align: right; padding-right: 5px;">✓</div> <ul style="list-style-type: none"> 03-15-2014 (03-15-2014) 06-03-2013 (06-03-2013) 06-20-2013 (06-20-2013) 06-26-2013 (06-26-2013) 07-01-2013 (07-01-2013) 07-02-2013 (07-02-2013) 07-04-2013 (07-04-2013) 09-01-2013 (09-01-2013) <li style="background-color: #0070c0; color: white; padding: 2px;">New Effective Date (New) </div>

If you selected *New Effective Date*, the screen will refresh and the **Effective Date** field will be displayed. Type or select the date you want using the calendar icon.

Medicaid Roll Up Integration (cont.)

The detailed Medicaid Roll Up Integration setup screen for the selected **Effective Date** and **Roll Up Group Code** will be displayed. Complete the roll up setting fields based on the requirements of your practice.

Medicaid Roll Up Integration
System Manager
Eastside Medical (1)

Roll Up Group Code ▼

Effective Date

Collapse Charges Into
 First Procedure
 First E/M Code
 Fixed Procedure
 Do Not Collapse ✓

Fixed Procedure Code 🔍

Amount Billed
 Contracted
 Accumulated ✓

Contracted Amount \$

Include all Procedures on the Claim

Write-off Adjustment Code 🔍

Termination Date 📅

Field Name	Description
Effective Date	This field is for display purposes only. This date controls when the selected Integration settings will become effective for the selected Roll Up Group Code.
Roll Up Group Code	This field is for display purposes only. The selected Integration settings will only be applied to claims that meet the requirements defined for this Roll Up Group code in Maintain Group Codes.
Collapse Charges into	<p>First Procedure – select this option if you want all the charges rolled up into the first procedure code on the claim.</p> <p>First E/M Code – select this option if you want all the charges rolled up into the first E/M procedure code on the claim.</p> <p>Fixed Procedure – select this option if you want all the charges rolled up into a Fixed Procedure code, which you will select in the Fixed Procedure Code field below.</p> <p>Do Not Collapse – select this option if you do not want the charges collapsed or rolled-up.</p>

Medicaid Roll Up Integration (cont.)

Field Name	Description
Fixed Procedure Code	If you selected 'Fixed Procedure' above, this field will be required. Type or select the Procedure Code you want to use for Rolled up claims.
Amount Billed	Contracted – select this option if your practice is contracted to bill a designated amount for rolled up claims. If you select this option, the Contracted Amount field will be required. Accumulated – select this option if you want the accumulated total of all the charges to be submitted for the rolled up charge on the claim.
Contracted Amount	If you selected Contracted above, this field will be required. Type the contracted amount to be billed for Rolled up claims.
Include all Procedures on the Claim	A rolled up claim will only contain a single procedure code (based on the option selected for the Collapse Charges into field, unless you select to Include all Procedures . If you do select this option, the additional procedures will be included on the rolled up claim and the dollar amounts for the procedures will show as \$0.00 amounts.
Write-off Adjustment Code	**This field is not currently active.**

How Claims are Rolled Up


During the Insurance create process, the Doctor, Location, and Insurance Carrier codes on the claim will be checked first to see if they match the codes set up in a Roll Up Group Code. If a matching Roll Up Group Code does exist, then a check will be done to see if there is a corresponding Roll Up Integration setup for that Roll Up Group Code.

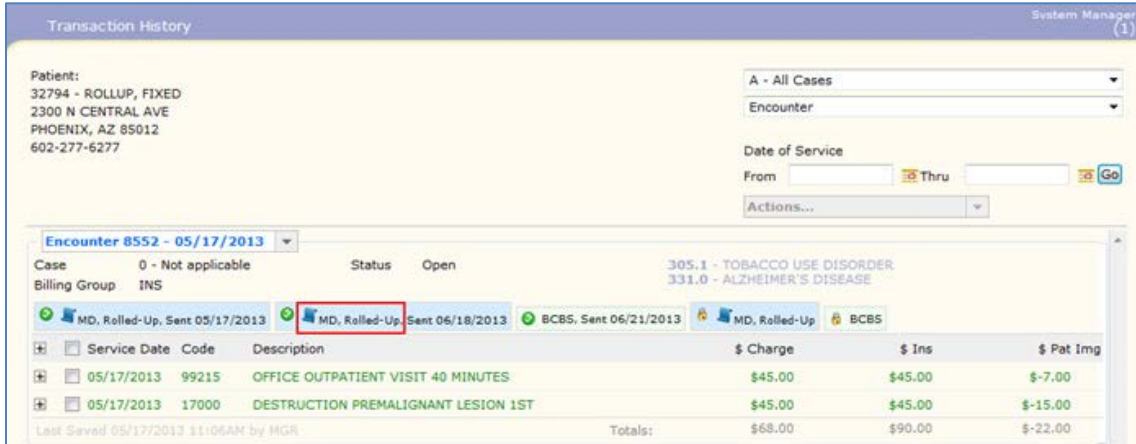
If a matching Roll Up Integration is stored, the claim will be rolled up based on the beginning service date for the claim - IF the service date falls on or after the Effective date stored in the Roll Up Integration function.

If more than one Roll Up Integration is found that matches all the requirements for the claim (listed above), the most current Roll Up Integration settings based on the **Effective Dates** stored, will be applied when the claim is rolled up.

Viewing Rolled up Claims in Encounter View in Transaction History

****Applies to 5010 rolled up claims only****

When you review the Transaction History for a patient and select Encounter view, any claim that has been rolled up will display the Roll-Up icon , the insurance carrier code, and the words *Rolled-Up* in the claim tab for the Encounter.



The screenshot shows the 'Transaction History' window for a patient. The patient information is: 32794 - ROLLUP, FIXED, 2300 N CENTRAL AVE, PHOENIX, AZ 85012, 602-277-6277. The encounter is 8552 - 05/17/2013. The status is 'Open'. The diagnosis codes are 305.1 - TOBACCO USE DISORDER and 331.0 - ALZHEIMER'S DISEASE. The table below shows the services and charges:

Service Date	Code	Description	\$ Charge	\$ Ins	\$ Pat Img
05/17/2013	99215	OFFICE OUTPATIENT VISIT 40 MINUTES	\$45.00	\$45.00	\$-7.00
05/17/2013	17000	DESTRUCTION PREMALIGNANT LESION 1ST	\$45.00	\$45.00	\$-15.00
Totals:			\$68.00	\$90.00	\$-22.00

Claim Preview function

When you click the claim tab to access the *Claim Preview* function:

- If the claim was generated in the electronic format, and you click the Paper tab, a message will display in the bottom of the claim preview window that states, *"This rolled-up claim has been generated electronically. The paper representation of the claim has been generated only as a courtesy and may not reflect the rolled-up procedure code."*
- If the claim was generated in the paper format, and you click the Electronic tab, a message will in the bottom of the claim preview window that states, *"This rolled-up claim has been generated via paper. The electronic representation of the claim has been generated only as a courtesy and may not reflect the rolled-up procedure code."*

Note: The rolling up of the claim will only be present on the claim image and in the claim file *after* it has been sent.

All reports such as the Transmission File, Transmission Journal, Exception Report, and Insurance Filing report will show the procedures from the Encounter and will not show as 'rolled up'. This is done to mimic the setup of roll up billing in the 4010 claims and to provide details for the claim that relate to the specific procedures.