

Creating & Billing a Batch

For Private Pay Clients

Create the Batch

1. **Getting here:** Login, select the **Facility**, select **Agency**, **Billing**, and **Claim Item List** on the Navigation Pane (left menu).
2. Click **Create Batches**.
3. Select the **Private Pay Plan** and move it to the Selected Plans box (on the right).
4. Click **Go**.

Idaho-WITS Training

User: Trainee8, Treatment | Location: Provider Training Agency, Treatment Location 1

Navigation Pane (Left): Home Page, Agency Contacts, Agency, Agency List, Tx Team Groups, Billing, Invoicing, Claim Item List, Claim Batch List, Encounter List, EOB Transaction List, Payment List, Billing Transaction List, Client Balance, Cost Center, Payor Plan List, Authorization List, Contract Management, Group List, Clinical Dashboard, Client List.

Form Fields: Group Enrollment, Client Last Name, S/R Party Last Name, Rendering Staff, Service Date, ENC ID, Charge, Service.

Buttons: Clear, Go

Actions	Item #	Client Name	FFS Type	Add-On Level	Service Date	Service	Duration	Status	Release Date	Charge
	2738	Dean, James	FFS	None	9/2/2014	H0004TF/HF	60 Min	Released	9/25/2014	\$35.00
	2801	Lad, Chad	FFS	None	11/3/2014	H0001HF	60 Min	Released	11/6/2014	\$60.00
	2807	Pay, Private	FFS	None	11/13/2014	H0005H2/HF	60 Min	Released	11/13/2014	\$80.00
	2811	Pay, Private	FFS	None	11/13/2014	H0006	30 Min	Released	11/14/2014	\$10.00
	2812	Pay, Private	FFS	None	11/14/2014	H0006	60 Min	Released	11/14/2014	\$20.00

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Dialog: Choose Plan(s) for Batching

Available Plans: Medicaid - OPTUM, Self Pay 10%, Self-Pay

Selected Plans: Blue Shield of ID (Regence), PO Box 31603, S

Buttons: Cancel, Clear, Go

Billing a Private Pay Batch

NOTE: These instructions pertain to billing a private-pay entity such as an insurance company. To bill a self-pay client, proceed to the instruction to **Bill a Self-Pay Batch**.

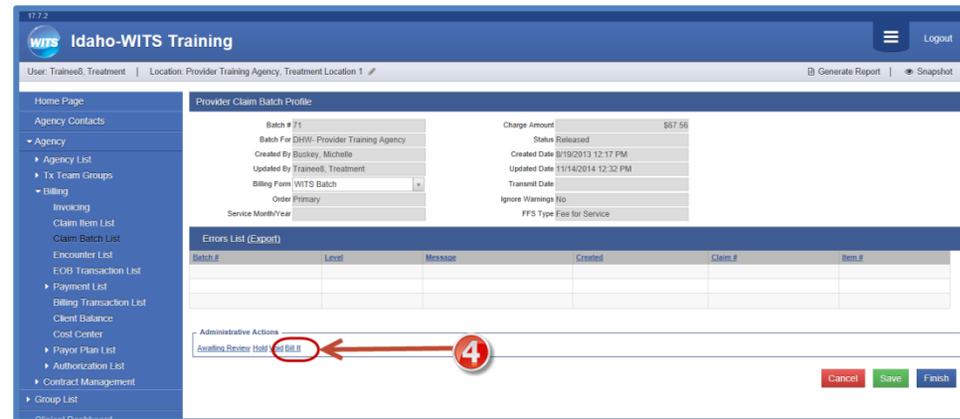
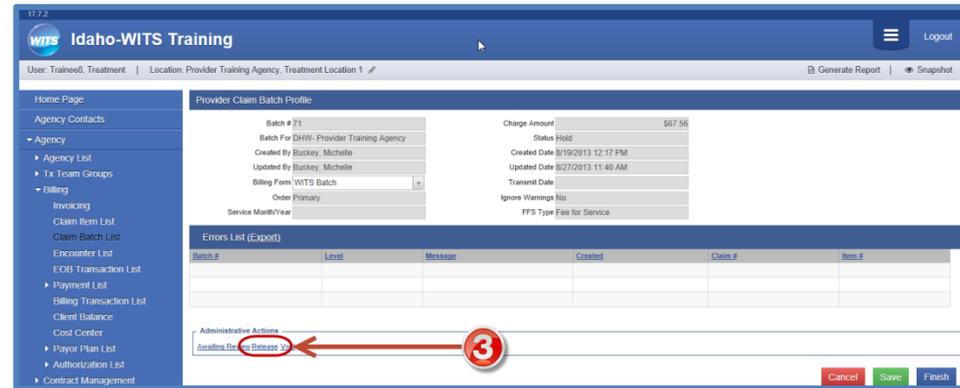
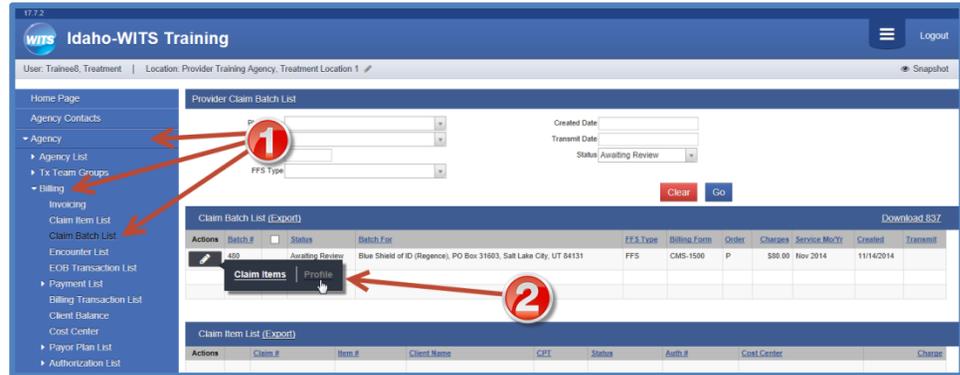
1. **Getting here:** Login, select the **Facility**, select **Agency, Billing, and Claim Batch List** on the Navigation Pane (left menu).

2. Locate the batch you intend to bill. Click **Profile** in the Actions column.

NOTE: Private-pay batches default to a status of **Released** and a billing form of **CMS-1500**.

3. Click **Release** in the Administrative Actions box.

4. Click **Bill It** in the Administrative Actions box.



5. Select **Yes or No** for Would you like to print the background image of the CMS1500 in addition to the data?

NOTE: Selecting **Yes** prints a CMS-1500 form including the information needed to submit the claim to a private insurer. Selecting **No** allows the user to print directly onto a blank CMS-1500 form.

6. **Click the printer icon** in the pop-up window or the print command located under File in the pop-up window.

