

Creating & Billing a Batch For Self Pay Client

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 **Self Pay Plan** and move it to the Selected Plans box (on the right).
4. Click **Go**.

The screenshot shows the 'Claim Item Search' form with various input fields. A red circle with the number '1' is placed over the 'Agency' dropdown menu. A red arrow points from this circle to the 'Agency' menu in the left navigation pane. Another red circle with the number '2' is placed over the 'Create Batches' button. A red arrow points from this circle to the 'Create Batches' button in the left navigation pane.

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	H0004/TF/HF	60 Min	Released	9/25/2014	\$35.00
	2801	Lad, Chad	FFS	None	11/3/2014	H0001/HF	60 Min	Released	11/6/2014	\$60.00
	2807	Pay, Private	FFS	None	11/13/2014	H0005/HZ/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

The screenshot shows the 'Choose Plan(s) for Batching' dialog box. A red circle with the number '3' is placed over the 'Self-Pay' plan in the 'Selected Plans' box. A red arrow points from this circle to the 'Self-Pay' plan in the 'Selected Plans' box. Another red circle with the number '4' is placed over the 'Go' button. A red arrow points from this circle to the 'Go' button.

Billing a Self-Pay Batch

NOTE: These instructions pertain to self-pay billing only. To bill a private entity proceed to the instruction on Bill a Private 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: Self-pay batches default to a status of **Awaiting Review** and a billing form of **Invoice**.

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

17.5.0
wits Idaho-WITS Training
User: Williams, Denise | Location: Provider Training Agency, Treatment Location 1 | Snapshot

Home Page | Provider Claim Batch List

Agency Contacts

Agency

- Agency List
- GPRA Discharge Due
- GPRA Followup Due
- Facility List
- Staff List
- Tx Team Groups
- System Usage
- Drug Screening
- Billing
 - Invoicing
 - Claim Item List
 - Claim Batch List**
 - Encounter List
 - EOB Transaction List
 - Payment List
 - Billing Transaction List

Plan Name: [Dropdown] Created Date: [Text]
Billing Form: [Dropdown] Transmit Date: [Text]
Batch #: [Text] Status: Awaiting Review
FFS Type: [Dropdown]

Clear Go

Claim Batch List (Export) Download 837

Actions	Batch #	Status	Batch For	FFS Type	Billing Form	Order	Charges	Service Mo/Yr	Created	Transmit
[Edit]	452	Awaiting Review	Self Pay 10%	FFS	Invoice	S	\$80.00	Oct 2014	10/16/2014	
[Edit]	453	Awaiting Review	Self Pay 10%	FFS	Invoice	P	\$80.00	Oct 2014	10/16/2014	

Claim Items Profile

Claim Item List for Batch 452 (Export) Remove From Claim Batch

Actions	Claim #	Item #	Client Name	CPT	Status	Auth #	Cost Center	Charge
[Edit]	2120	2751	Lad, Chad	H0001	Batched			\$80.00

Provider Claim Batch Profile

Batch # 453 Charge Amount \$80.00
Batch For Self Pay 10% Status Awaiting Review
Created By Williams, Denise Created Date 10/16/2014 5:39 PM
Updated By Williams, Denise Updated Date 10/16/2014 5:39 PM
Billing Form Invoice Transmit Date
Order Primary Ignore Warnings No
Service Month/Year 10/1/2014 FFS Type Fee for Service

Errors List (Export)

Batch #	Level	Message	Created	Claim #	Item #
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Administrative Actions

Release Hold Void

Cancel Save Finish

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

NOTE: A pop-up window containing an Invoice will open after clicking Bill It.

5. To print the Invoice click the **printer icon** in the pop-up window or the print command located under File in the pop-up window.

NOTE: The invoice can be provided to the client for payment.

Provider Claim Batch Profile

Batch # 453	Charge Amount \$80.00
Batch For Self Pay 10%	Status Released
Created By Williams, Denise	Created Date 10/16/2014 5:39 PM
Updated By Williams, Denise	Updated Date 10/16/2014 6:04 PM
Billing Form Invoice	Transmit Date
Order Primary	Ignore Warnings No
Service Month/Year 10/1/2014	FFS Type Fee for Service

Errors List (Export)

Batch #	Level	Message	Created	Claim #	Item #

Administrative Actions

[Awaiting Review](#) [Hold Void](#) [Bill It](#)

Cancel Save Finish

https://idaho-training.witsweb.org/p?stateMachineStateName=Report&stateMachineEventName=Generat - Microsoft Internet Explorer p

https://idaho-train... idaho-training.witsweb.org

File Edit Go to Favorites Help

Contract Profile TestLink - Login Idaho Employees Portal Get more Add-ons Page Safety Tools

Invoice Page: 1

Provider Training Agency

Invoice #	2121
Account #	
Date	10/16/2014

Bill To	Client
Lad, Chad	Lad, Chad
123 Street	123 Street
Boise, ID 88888	Boise, ID 88888

Ref #	Start Date	End Date	Duration	Service	Staff	Charges	Balance
2752	10/15/2014	10/15/2014	60 Min	H0001/HF	Williams, Denise	\$80.00	\$80.00

Total Charges: \$80.00
Total Balance: \$80.00

Complete the Billing Process

1. **Getting here:** Login, select the **Facility**, select **Agency**, **Billing**, and **Claim Batch List** on the Navigation Pane (left menu).
2. Locate the batch that was billed. Click **Profile** in the Actions column.
3. Click **Billing Process Complete** in the Administrative Actions box.

Idaho-WITS Training

User: Williams, Denise | Location: Provider Training Agency, Treatment Location 1

Home Page

Agency Contacts

Agency

Agency List

GPRA Discharge Due

GPRA Followup Due

Facility List

Staff List

Tx Team Groups

System Usage

Drug Screening

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

Provider Claim Batch List

Plan Name: Blue Shield of ID (Regence), PO Box 3...
Billing Form: [Dropdown]
Batch #: [Input]
FFS Type: [Dropdown]

Created Date: [Input]
Transmit Date: [Input]
Status: [Dropdown]

Clear Go

Claim Batch List (Export) Download 837

Actions	Batch #	Status	Batch For	FFS Type	Billing Form	Order	Charges	Service Mo/Yr	Created	Transmit
[Icon]	450	Released	Blue Shield of ID (Regence), PO Box 31603, Salt Lake City, UT 84131	FFS	CMS-1500	S	\$80.00	Oct 2014	10/16/2014	
[Icon]	450	Billed	Blue Shield of ID (Regence), PO Box 31603, Salt Lake City, UT 84131	FFS	CMS-1500	P	\$90.00	Oct 2014	10/16/2014	10/23/2014
[Icon]	450	Billed	Blue Shield of ID (Regence), PO Box 31603, Salt Lake City, UT 84131	FFS	CMS-1500	S	\$240.00	Jul 2014	10/23/2014	10/23/2014

Claim Item List (Export)

Actions	Claim #	Item #	Client Name	CPT	Status	Auth #	Cost Center	Charge
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NOTE: The claim will be changed to a status of Accepted.

Provider Claim Batch Profile

Batch # 451

Batch For Blue Shield of ID (Regence), PO Box

Created By Williams, Denise

Updated By Albro, Amber

Billing Form CMS-1500

Order Primary

Service Month/Year 10/1/2014

Charge Amount \$60.00

Status Billed

Created Date 10/16/2014 5:38 PM

Updated Date 10/23/2014 3:24 PM

Transmit Date 10/23/2014 3:24 PM

Ignore Warnings No

FFS Type Fee for Service

Errors List (Export)

Batch #	Level	Message	Created	Claim #	Item #
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Administrative Actions

Billing Process Complete Reprint

Finish