

Log in to SanWITS – Enter your Agency and Facility- Click GO

The image shows the SanWITS Training interface. On the left is a navigation menu with options: Home Page, Agency, Group List, Client List, System Administration, and Reports. The main area is titled 'Change Facility' and contains the following fields: 'Current Agency' (San Diego County), 'Current Facility' (empty), 'New Agency' (Residential Train), and 'New Facility' (RES Train 1). At the bottom of the form are 'Cancel' and 'Go' buttons. A red rectangle highlights the 'Change Facility' form area.

BHS Billing Unit requires all the providers to review the three important screens prior to releasing the encounters to billing.

Note: All diagrams used in this guide are for training purposes only.

REVIEW PROCESS

Go to Agency - Client List – Enter the Client’s First and Last Name or the Unique Client ID # - click Go

I. Review the Client Profile screen data

The image shows the SanWITS Training interface with the 'Client Search' form. The left navigation menu has 'Client List' highlighted. The 'Client Search' form contains the following fields: 'Agency' (Residential Train), 'Facility' (empty), 'First Name' (empty), 'Last Name' (empty), 'SSN' (empty), 'DOB' (empty), 'SanWITS Training Client Id' (empty), 'Unique Client Number' (empty), 'Provider Client ID' (empty), 'Treatment Staff' (empty), 'Primary Care Staff' (empty), 'Case Status' (All Clients), 'Intake Staff' (empty), 'Other Number' (empty), 'Number Type' (empty), and 'Include Only Active Consents' (Yes). At the bottom right are 'Clear' and 'Go' buttons. A red rectangle highlights the 'Go' button.

- 1) Review the client profile by entering the Client’s First and Last Name or the Unique Client ID #.
- 2) Click GO

Notes:

The guidelines in completing the Client Profile is part of the SanWITS Basic/Updates training and will be part of the SanWITS manual. If you only viewed the screen, click the Cancel or Finish button to exit. Only click Save when you make changes on the Client Profile.

Month, July | MJ01061575

Home Page

Agency

Group List

Authorization Dashboard

Residential Unit Dashboard

Residential Unit Mgmt

Client List

Client Profile

Alternate Names

Additional Information

Contact Info

Collateral Contacts

Other Numbers

History

Payor Group Enrollment

Authorization

Client Profile

Current First Name

July

Middle Name

Month

Current Last Name

Month

Birth First Name

July

Birth Last Name

Month

Mother's First Name

Mother

Gender

1-Male

DOB

6/15/1975

No Readmit Until

Record Created By

Lansang, Cheryl-Resident

Last Updated By

Lansang, Cheryl-Resident

Administrative Actions

State Client ID

MJ01061575

State Client No

Provider Client ID

SSN

99902

Driver's License

99902

None or not applicable

Medicaid #

Date of Death

Place of Birth

San Diego

California

Consent on File for Future Contact

No

Has Paper File

Yes

Created Date

6/15/2018 2:02 PM

Last Updated Date

6/15/2018 2:02 PM

Cancel

Save

Finish

II. Review the Payor Group Enrollment screen

Click the Actions button and Edit to open the Benefit Plan information

Home Page

Agency

Group List

Authorization Dashboard

Residential Unit Dashboard

Residential Unit Mgmt

Client List

Client Profile

Alternate Names

Additional Information

Contact Info

Collateral Contacts

Other Numbers

History

Payor Group Enrollment

Authorization

Payor List

Actions	Priority	Plan	Group	Subscriber Acct	Subscriber Resp Party	Start Date	End Date
	1	ODS Residential	DMC Billable	01234576A		6/1/2018	
	2	ODS DMC-Non Pen	Medi-Cal - Non Perinatal	01234576A	Month, July	7/1/2018	
		DP-Non Perinatal	Medi-Cal - Non Perinatal	01234576A	Month, July	6/1/2018	6/30/2018

Edit

Remove

Make sure all the bright yellow fields have the correct information.

Notes:

- The guides in completing the Payor Group Enrollment screen is included in the Organizational Provider Billing Manual.
- Subscriber ID #: must be 8 numbers plus 1 upper case letter (total of 9 digits).
- Coverage Start Date: must match the Program Enrollment
- Ensure the client's name and DOB in Payor Group Enrollment matches the Medi-Cal eligibility verification report.
- Coverage End Date: required if client is discharged from the program or aid code has changed.
- A valid aid code for the month and year of service must be entered in the Aid Code field. If aid code changes from last month (ex. 07/2018), provider must end the existing Payor Group
- Enrollment using the last day of the previous month (ex. 07/30/2018) as the End Date. Then, open a new Payor Group Enrollment using the first day of the month (ex. 08/01/2018) that the new aid code is effective.
- Address 1: must enter the physical address (no PO Box or do not type homeless). If client is homeless, please use your facility address instead.
- Address 2 (white field) can be used for Apt. #, etc.
- Zip Code: use the correct zip code (visit usps.com website to verify).

- After reviewing the Payor Group Enrollment screen and no changes is applied, click the Cancel button. Only click the Save button when updates or changes are made on this screen.

III. Review the Encounters screen

On the left-hand side of your screen (blue navigation pane), click Agency – Billing - Encounter List. Please Revised

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Generate Report | Snapshot

Home Page

- Agency
- Group List
- Authorization Dashboard
- Residential Unit Dashboard
- Residential Unit Mgmt
- Client List
 - Client Profile
 - Linked Consents
 - Contacts
 - Activity List
 - Intake
 - Tx Team
 - Screening
 - Assessments
 - ASAM
 - Admission
 - Program Enroll
 - Diagnosis List
 - Encounters
 - Profile

Encounter Search

Start Date: 10/22/2017 X End Date: 10/22/2018

Rendering Staff: Service: Program: Group Session ID:

Allow Disclosure of Note: Clear Go

Encounter List (Export) Add Encounter

Actions	Svc Date	Service	ENC ID	Rendering Staff	Program Name	Group Session ID	Status
	10/6/2018	Case Management 3.1 RES	531413		RES-3.1		Released
	10/5/2018	Residential Bed Day 3.1	531414		RES-3.1		Not Released
	9/11/2018	Residential Bed Day 3.1	531415		RES-3.1		Released
	9/10/2018	Case Management 3.1 RES	531416		RES-3.1		Released
	9/9/2018	Residential Bed Day 3.1	531417		RES-3.1		Released
	8/6/2018	Residential Bed Day 3.1	530540		RES-3.1		Not Released
	8/5/2018	Residential Bed Day 3.1	530210		RES-3.1		Released
	7/6/2018	Residential Bed Day 3.1	530209		RES-3.1		Not Released
	7/2/2018	Residential Bed Day 3.1	530208		RES-3.1		Released

Open the **Encounter Profile** by clicking the Actions button (pencil) Please revised

Assessments

ASAM

Admission

Program Enroll

Diagnosis List

Encounters

Profile

	9/9/2018	Residential Bed Day 3.1
	9/6/2018	Case Management 3.1 RES
	8/6/2018	Residential Bed Day 3.1
	8/5/2018	Residential Bed Day 3.1
	7/6/2018	Residential Bed Day 3.1

Review Clone

3) Carefully review the Encounter fields

NOTES:

- All the bright yellow fields are required by the system
- Some white fields (e.g. Duration) are also required
- Billable field: Yes
- Medi-Cal Billable: Yes

(note: if the service is used to clear the SOC, the service should be county billable).

Primary Diagnosis field must be present. Use the ICD-10 Master Chart (version 10/2017) from BHS Billing Unit.
 Rendering Staff: must have a valid NPI set-up in the Staff Members List page in SanWITS

BILLING PROCESS:

I. Release to Billing

After carefully reviewing the client and claims data, scroll all the way down to the Administrative Actions and click **Release to Billing**.

Save and Finish to return to the main screen of the Encounter List.

II. After Release to Billing

On the navigation pane, click Billing – Claim Item List

Complete the four (4) fields: Plan, Item Status (Item Status default: All Awaiting Review), Facility, and Service Date fields.

Note: To enter a service date range, use this format: **07012018:07312018 (for July 2018 services).**

3) Click GO. The services you released to billing will appear at the bottom of your screen.

The screenshot shows the 'Claim Item Search' form. Red boxes highlight the following fields: 'Plan' (set to 'ODS DMC- Non Peri'), 'Item Status' (set to 'All Awaiting Review'), 'Facility' (set to 'RES Train 1'), and 'Service Date' (set to '09012018.0930'). The 'Go' button is also highlighted. The left sidebar shows the 'Billing' menu with 'Claim Item List' selected. Below the form, the 'Claim Item List (Export)' table is visible, showing one item with status 'Awaiting Review'.

Actions	Item #	Client Name	FFS Type	Add-On Level	Service Date	Service	Duration	Status	Release Date	Charge
	527774	Month, July	FFS	None	9/6/2018	H0006/U1	40 Min	Awaiting Review	10/22/2018	\$82.72

4) Run your billing report (while claims are in Claim Item List and Awaiting Review status) by clicking the **Export** hyperlink.

The screenshot shows the 'Claim Item List (Export)' table. A red box highlights the 'Export' link, and a red arrow points to it. The table has columns for Actions, Item #, Client Name, FFS Type, Add-On Level, Service Date, Service, Duration, Status, Release Date, Charge, and Group Session ID. The first row shows item 527774 with status 'Awaiting Review' and a charge of \$1.00.

Actions	Item #	Client Name	FFS Type	Add-On Level	Service Date	Service	Duration	Status	Release Date	Charge	Group Session ID
	527774	Month, July	FFS	None	7/2/2018	H0019/U1	1 Days	Awaiting Review	8/5/2018	\$1.00	

5) Once you click Export, the pop-up box will ask if you want to save or open the file.

The screenshot shows a file dialog box with the text: 'Do you want to open or save ClaimItemList_20180805.xls (598 bytes) from sandiego-training.witsweb.org?'. The 'Open' button is highlighted with a red box.

6) You can open the file but read the Warning sign before clicking Yes.

The screenshot shows a Microsoft Excel warning dialog box with a yellow warning icon and the text: 'The file format and extension of 'ClaimItemList_20180805.xls' don't match. The file could be corrupted or unsafe. Unless you trust its source, don't open it. Do you want to open it anyway?'. The 'Yes' button is highlighted with a red box.

7) The Excel file will appear like this:

Item #	ENC ID	Client Name	Payor	FFS Type	Add-On	Leve	Unique Client #	Rendering Staff Name	Payor Na	Group Na	Subscrib	Authoriz	Service C	End Date	Service	Service L	Billing Un	Duration	Status	Release I	Charge	Group Se	ClC Paym	primary d	seconda	tertiary di	Create
527718	530208	Month, July	559999	- FFS	None		MJ01061575	Saline, Carmen	CDS Res	DMC Bill	0123457	100171	7/2/2018	7/2/2018	H0019IU	55	1	1Days	Awaiting	8/5/2018	\$1.00		\$0.00	F10.151			8/5/20

Notes:

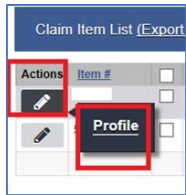
- You can filter the file based on the data you need.
- You can also use this report to double-check some billing data (i.e. Client Name, Subscriber ID #, Rendering Staff, Service Date, Service Location, Primary Diagnosis, etc.) and correct the error before batching the claims.
- Save this report to your preferred folder.

8) After double checking your claims and there's no error found, the claims in Awaiting Review status must be "released" first to be able to batch them. **Only release (Second release) the claims that you are ready to batch. If you are not ready to batch the claims please leave the status as awaiting review.**

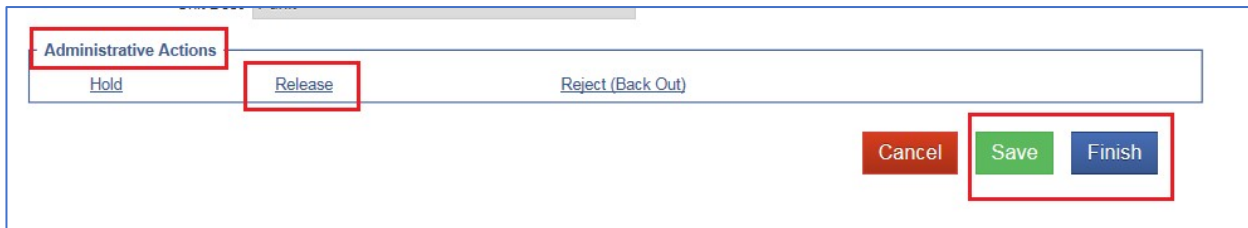
Notes: Providers have the option to either release the claims individually to review the claim information one more time or to release the claims in bulk/altogether.

4) Release claims to ready for batching. Providers can either release the claim individually to review the claim entry one more time or to release the claims altogether.

a. To release encounter individually, click the pencil icon and click Profile.



b. On the Administrative Actions, click Release.



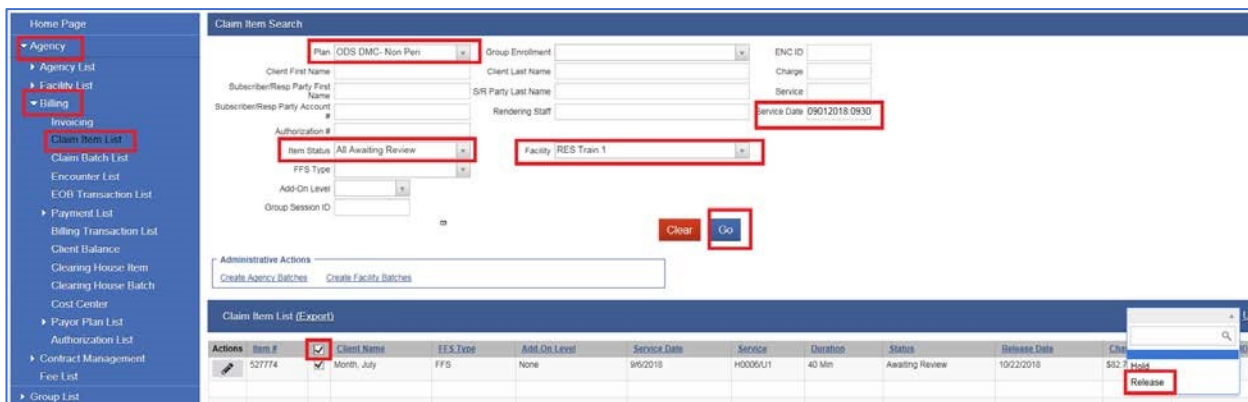
OR

a. Release all claims together.

To do this, put a checkmark on the tiny box in between the Item # and Client Name titles. By doing so, all the Item # boxes will be selected by the system.

On the right side of the screen, click the dropdown menu and select Release.

Click Update Status. All awaiting review claims will be staged to status: Release.



III. Claim Item List - Released Status

On the same screen (Claim Item List), change the Item Status field from All Awaiting Review to Released. Click GO. The released claims are ready to be batched.

3) To batch, click the hyperlink **Create Facility Batches**.

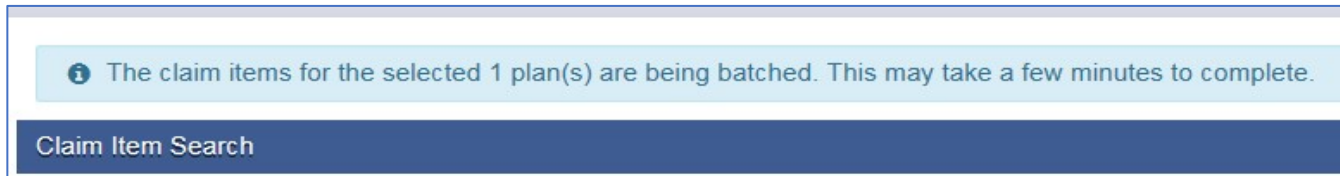
The screenshot shows the 'Claim Item Search' interface. On the left is a navigation menu with 'Agency' expanded, showing 'Agency List', 'Facility List', 'Billing' (expanded), 'Invoicing', 'Claim Item List' (highlighted), 'Claim Batch List', 'Encounter List', 'EOB Transaction List', 'Payment List', 'Billing Transaction List', 'Client Balance', 'Clearing House Item', 'Clearing House Batch', 'Cost Center', and 'Power Plan List'. The main search area contains several input fields: 'Plan' (ODS DMC- Non Peri), 'Group Enrollment', 'ENC ID', 'Client First Name', 'Client Last Name', 'Charge', 'Subscriber/Resp Party First Name', 'S/R Party Last Name', 'Service', 'Subscriber/Resp Party Account #', 'Rendering Staff', 'Service Date' (09012018.0930), 'Authorization #', 'Item Status' (Released), 'Facility' (RES Train 1), 'FFS Type', 'Add-On Level', and 'Group Session ID'. At the bottom right are 'Clear' and 'Go' buttons. Below the search fields is an 'Administrative Actions' section with 'Create Agency Batches' and 'Create Facility Batches' (highlighted) links. The footer shows 'Claim Item List (Export)'.

Click the Available Plan and the arrow right to move to the Selected Plan.

The screenshot shows the 'Choose Plan(s) for Batching' screen. The left navigation menu is the same as the previous screen, with 'Billing' expanded and 'Claim Item List' highlighted. The main area has two columns: 'Available Plans' containing 'ODS DMC- Non Peri' and 'Selected Plans' which is empty. Between the columns are right and left arrow buttons. At the bottom are 'Cancel', 'Clear', and 'Go' buttons.

This screenshot shows the same 'Choose Plan(s) for Batching' screen after an action. The 'Available Plans' column is now empty, and the 'Selected Plans' column now contains 'ODS DMC- Non Peri'. The 'Go' button at the bottom right is highlighted with a red box.

Click GO. The blue message will appear on top of your screen -claims are being batched.



Click the **Claim Batch List** folder. Batch status is defaulted to status: Awaiting Review.

Notes:

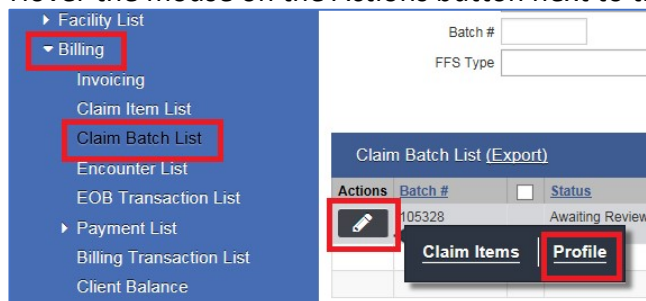
The system creates the batch and the batch # automatically.

If Batch does not appear in more than 10 minutes, change the Status field from Awaiting Review to Batch Processing Error. Commonly batch error is caused by error or missing rendering staff NPI.

IV. Claim Batch List and Send to Clearing House

The Batch will appear if batching is successful.

Hover the mouse on the Actions button next to the Batch # then click Profile.



On the Claim Batch List Profile, click the Administrative Actions: Release 4) Click Save.

Home Page
Agency
Agency List
Facility List
Billing
Invoicing
Claim Item List
Claim Batch List
Encounter List
EOB Transaction List
Payment List
Billing Transaction List
Client Balance
Clearing House Item
Clearing House Batch
Cost Center
Payor Plan List
Authorization List
Contract Management
Fee List
Group List
Authorization Dashboard
Residential Unit Dashboard
Residential Unit Mgmt

Provider Claim Batch Profile

Batch # 105328
Batch For ODS DMC- Non Peri
Created By User, System
Updated By User, System
837 Type 837P
Order Primary
Service Month/Year 9/1/2018

Charge Amount \$82.72
Status Awaiting Review
Created Date 10/23/2018 8:27 AM
Updated Date 10/23/2018 8:27 AM
Transmit Date
Ignore Warnings No
FFS Type Fee for Service
HIPAA Processing Set
837 File Status
Transmission Message

Errors List (Export)

Batch #	Level	Message	Created

Administrative Actions

Release
Hold
Void

Cancel
Save
Finish

It will take you to the next screen.

Scroll down to the Administrative Actions and click **Send to the Clearing House**.

Home Page
Agency
Agency List
Facility List
Billing
Invoicing
Claim Item List
Claim Batch List
Encounter List
EOB Transaction List
Payment List
Billing Transaction List
Client Balance
Clearing House Item
Clearing House Batch
Cost Center
Payor Plan List
Authorization List
Contract Management
Fee List
Group List
Authorization Dashboard
Residential Unit Dashboard
Residential Unit Mgmt
Client List

Provider Claim Batch Profile

Batch # 105328
Batch For ODS DMC- Non Peri
Created By User, System
Updated By Lucas, Mayuri
837 Type 837P
Order Primary
Service Month/Year 9/1/2018

Charge Amount \$82.72
Status Released
Created Date 10/23/2018 8:27 AM
Updated Date 10/23/2018 8:34 AM
Transmit Date
Ignore Warnings No
FFS Type Fee for Service
HIPAA Processing Set
837 File Status
Transmission Message

Errors List (Export)

Batch #	Level	Message	Created

Administrative Actions

Awaiting Review
Hold
Void
Send To Clearing House

Cancel
Save
Finish

Click Save and Finish. Your batch will be received by the Clearing House for processing.
Once your provider batch is submitted to the Clearing House folder, email the Submission Certification (ADP 100186 form) to the Billing Unit at: ADSBillingUnit.HHSA@sdcounty.ca.gov.

How to complete the ADP 100186 form (billing submission certification)

County Name will be San Diego

Provider Name: enter your facility name

DMC Number: 4-digit Provider number

Service Facility Location NPI: your location NPI • DMC Submission Identifier: Provider Batch Number.

STATE OF CALIFORNIA HEALTH AND HUMAN SERVICES AGENCY		DEPARTMENT OF ALCOHOL AND DRUG PROGRAMS	
DRUG MEDI-CAL (DMC) CLAIM SUBMISSION CERTIFICATION - COUNTY CONTRACTED PROVIDER			
County Name: _____ Provider Name (Legal Entity): _____ DMC Number(s): _____ Service Facility Location NPI(s): _____ DMC Submission Identifier: _____		FOR COUNTY USE ONLY: Receipt Date: _____ EDI File Name: _____ EDI File Submission Date: _____	
COUNTY CONTRACTED PROVIDER CERTIFICATION			
<p>As required by 42 CFR Part 455.18, this is to certify that the claim file information submitted by the provider in the DMC submission identified above is true, accurate and complete. I understand that payment of this claim file will be from Federal and/or State funds, and that any falsification, or concealment of material facts, may be prosecuted under Federal and/or State laws.</p> <p>I hereby agree to keep such records as are necessary to disclose fully the extent of the services provided to individuals under the State's Title XIX plan and to furnish information regarding any payments claimed for providing such services as the State Department of Alcohol and Drug Programs or the Department of Health and Human Services may require. I further agree to accept as payment in full the amount paid by the Medi-Cal program for those claim files submitted for payment under the program with the exception of authorized deductible, co-insurance, or similar cost sharing charge.</p> <p>I certify that the services identified in the above identified DMC submission were medically indicated and necessary to the health of the patients and were personally furnished by me or an employee working for the provider.</p>			
Printed Name: AUTHORIZED SERVICE PROVIDER _____			
Signature: AUTHORIZED SERVICE PROVIDER _____		Phone Number _____ () _____	Date Signed _____
ADP 100186 (Effective 12-31-2009)			

The Billing Unit Administrator will contact you if errors are detected on the batch.
Batch will be submitted to the State.

POST Billing Processes:

Any claims denied by the State or Medi-Cal will be emailed (encrypted) to providers for further review. Billing Unit will work with you in replacing and rebilling the claims denied in error (i.e. data entry error). If claims are denied by the State correctly (e.g. claims denied because aid code is not DMC billable), please contact the BHS Billing Unit for further instructions.

Notes:

- The Billing Unit staff will contact you if errors are detected on the batch.
- Batch will be submitted to the State. Any claim denials will be emailed (encrypted) to the providers for further review.

Summary of Changes:

Title/Comment	Page	Date Changed
Run your billing report Claim Item List (export hyperlink)	6	5/22/2019
Updated #3 to hyperlink, Create Facility Batches	8	5/22/2019

Disclaimer: As we learn more about DMC ODS, the workflow/billing screens are subject to change. ****