Monthly Billing Translator IN-TOOL Instructions
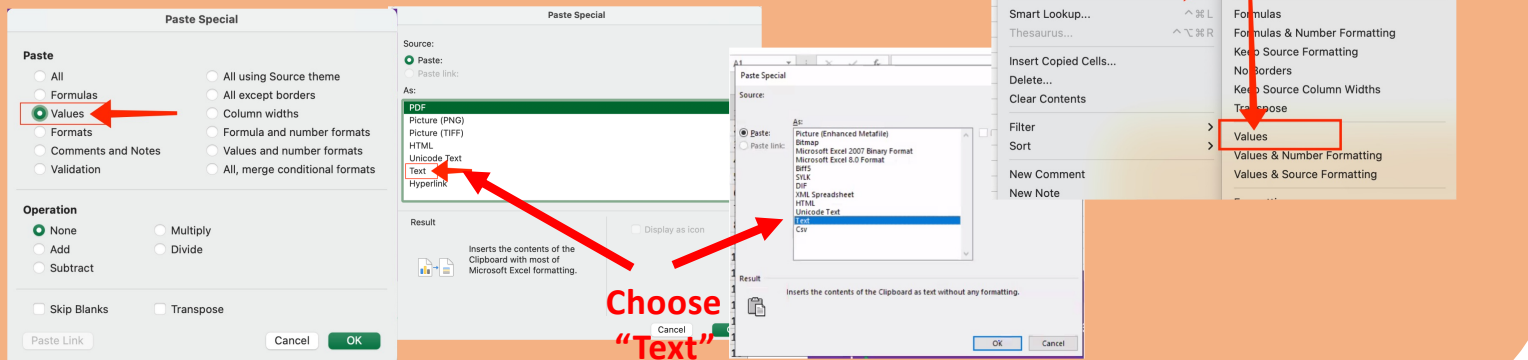
1) Download the Authorization Report from the Managed Care Plan. Use the appropriate date range for your Billing Report period.

2) COPY all data from the Authorization Report

3) HERE IN CELL A1 Paste: Special: Values ...
          We have seen 6 variations of Paste Special (see examples)
          Max **750** rows per conversion

4) When DONE Either:
          A) Simply close this Excel and do NOT save your changes
           OR
          B) Select All (corner above A1), then Right-Click and Clear Contents
             (Do NOT "Delete" rows or columns)

Sometimes Paste:Special Values looks like this!!!

RIGHT Click, then Paste Special: Values

Choose "Text"

Tab 1

1) Copy the Member ID #'s from the Authorization Report, Tab 1.

2). On the Octavia Client List view, go to Queries > Query List Management. Edit the list "CenCal Export Member ID #s" to include your Member ID #'s from Tab 1.
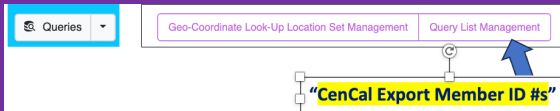
3). Run the query: "Monthly Billing Query"

4). Export the results:
   a. List Actions > Export
   b. Choose Client List > "Monthly ECM Billing"
   c. Copy the data from the Export
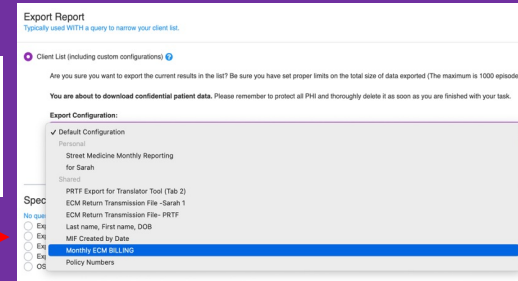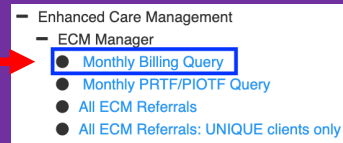
5). HERE IN CELL A1 Paste: Special: Values ...
   Max **750** rows per conversion

6) When DONE Either:
   A) Simply close this Excel and do NOT save your changes
   OR
   B) Select All (corner above A1), then Right-Click and Clear Contents
   (Do NOT "Delete" rows or columns)
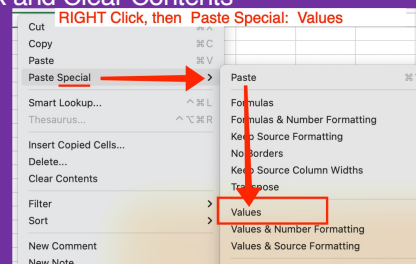
See Paste Special instructions on tab 1 if Paste Special Values looks different for you here

Tab 2

1) On the Octavia Client List view (NO query needed): **"Export Contact Count Dates by Agency(s)"**
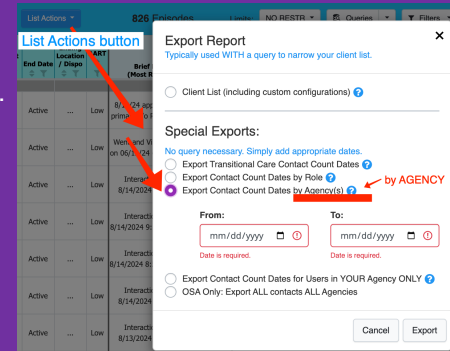   Steps:
   A) Click the blue [List Actions] button and select "Export"
   B) Select SPECIAL Exports: ⊙ **"Export Contact Count Dates by <u>Agency(s)</u>"**
   C) **IMPORTANT:** Enter the dates of your report (should match the reporting dates in Tab 1.
   D) Click the blue [Export] button

2) HERE in Excel: Paste: Special: Values from above export into cell A1
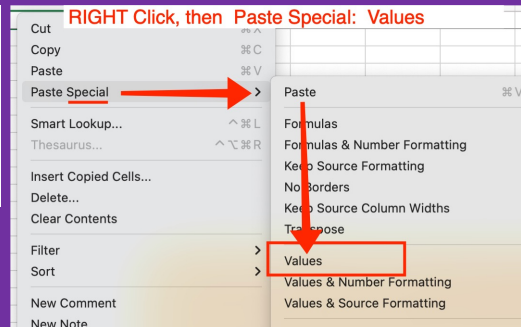   Max **750** rows per conversion

3) When DONE Either:
   A) Simply close this Excel and do NOT save your changes
   OR
   B) Select All (corner above A1), then Right-Click and Clear Contents
      (Do NOT "Delete" rows or columns)

See Paste Special
instructions on tab 1 if
Paste Special Values looks
different for you here

RIGHT Click, then Paste Special: Values

Cut	
Copy	⌘C
Paste	⌘V
Paste Special	>

Paste	⌘V
Formulas	
Formulas & Number Formatting	
Keep Source Formatting	
No Borders	
Keep Source Column Widths	
Transpose	
Values	
Values & Number Formatting	
Values & Source Formatting	

Smart Lookup...   ^⌘L
Thesaurus...   ^⌥⌘R
Insert Copied Cells...
Delete...
Clear Contents
Filter   >
Sort   >
New Comment
New Note

Export Report
Typically used WITH a query to narrow your client list.

○ Client List (including custom configurations) ?

Special Exports:
No query necessary. Simply add appropriate dates.
○ Export Transitional Care Contact Count Dates ?
○ Export Contact Count Dates by Role ?
⊙ Export Contact Count Dates by Agency(s) ? ← by AGENCY

From: To:
mm/dd/yyyy   mm/dd/yyyy
Date is required.   Date is required.

○ Export Contact Count Dates for Users in YOUR Agency ONLY ?
○ OSA Only: Export ALL contacts ALL Agencies

Cancel   Export

No Query is needed
for this export

Tab 3

Already Billed 4 Outreach

This tab will be maintained by you, the report creator.

It is advised to keep a separate excel file with a running list of previously billed authorization numbers. Paste them here to remove billing requests from your billing submission today.

AFTER you have submitted your billing today, THEN on "Send to Billing":
1. Filter column N "TAR #" to only A#'s
2. Copy the A#'s
3. Paste Special Values into your running list in the separate excel file.

You may choose to keep the running list here, however be cautioned that when you download a new version of this translator tool, this list of numbers will NOT be transferred into your new tool. You will need to re-populate manually.

You may include A#'s (to avoid >1 billing cycle for outreach) and/or W#'s (to avoid rebilling for encounters after a client has been discontinued from services.

 This step is optional, however failure to complete this step could result in fraudulent re-billing practices.

Tab 4

Column Q (Check for any errors. Fix & **re-export** Octavia data if indicated)

Column R (Lead Case Manager):
How to read Navigator counts to decide who should be the LCM when contact counts are tied:

Note: "Activity Count" here
Is when the user answered "yes" to "Do you want to increase your Activity count...?" This is usually NOT the same as a contact (Tele Or IN-Person)

This does usually represent the navigator who spent the most time with the client.

Navigators	Activity Counts (open [+] ^^ for more)
1|A.Smith	1|3
1|A.Smith	1|3
1|A.Smith 2|B.Jones 3|D.Hall 4|E.Cole	1|3 2|5 3|4 4|3

Number in first column represents navigator's name e.g. #1 = A. Smith

In this column, you can see that Navigator #2 (B. Jones) has the highest activity at 5 counts

Column S: Manually enter Place of Service.

Tab 5

CAUTION: Do not delete any rows or cells.

Rows containing "not found" are included here in the event that you need to locate them.

To filter out rows that contain "not found", use this SORT technique:
1. Click the sort arrow in Column E.
2. At 'choose one', select "does not contain"
3. Enter the word 'not' in the appropriate field.
4. Apply.

Reminder: Do not delete any rows or cells.

Column K Charge amount: Orange indicates this A#
Is included in your "already billed for outreach" list.

W# encounters: If no contacts were made this month
& you would like to submit billing, enter the charges manually. Billing is auto -generated only when an interaction is logged within Octavia during the billing period.

Optional: <u>After</u> you have submitted this billing report, then:
1. Filter column N "TAR #" to only A#'s
2. Copy the A#'s.
3. Paste Special Values into your running list in the separate excel file to avoid re-billing in the future.

Sort

| A↓ Ascending | Z↓ Descending |

By color: None

Filter

By color: None

| Choose One | *Not* |

Equals
Does Not Equal

Begins With
Does Not Begin With
Ends With
Does Not End With

Contains
Does Not Contain

Tab 6