



Quick Guide QA Review



March 22, 2018

Overview (QA Review)

The QA Review functionality is a mechanism by which paid services can be recouped.

There are 4 stages involved in the QA Review process:

Stages	Definition
Stage 1: Reviewable	All paid services (encounters and claims) that can be flagged for recoupment.
Stage 2: Flagged	All paid services that have been flagged for recoupment by either the Lead Agency or the Vendor.
Stage 2a: Flagged by File	Services flagged for recoupment through a file of records identified by Lead Agency Analysis.
Stage 3: Confirmed for Recoupment	All paid services that have been flagged for recoupment and agreed to be recouped by both Parties or identified for recoupment in the first place by the Vendor.
Stage 4: Repayment Process	Once services have been identified for recoupment, it is necessary for Falling Colors to get the funding back from the Vendor. This can be done through the reduction of payment against a future invoice or by the Vendor sending a check. Both can be done in increments.
Stage 4a: Confirmed for Refund	Services that have been repaid by the Vendor and identified as needing to be refunded to the Vendor.






In this guide, we will be discussing the ‘Boxing Ring’ only. The Boxing Ring is how a service moves from Stage 2 to Stage 4 or is released from the recoupment process along the way.

Overview (QA Review)

Boxing Ring

- Lead Agency must contact and inform the Vendor in order to start the clock for recoupment.
 - Lead Agency is required to enter when and who they contacted for records to be available for a Vendor to review.
- Vendors can choose to accept the recoupment, in which case they agree to make repayment via future payment offsets or by sending Falling Colors a check. (Stage 4)
- Vendors can petition records flagged for recoupment and attach supporting documentation to accommodate the petition.
- After a petition is made, the Lead Agency can request clarification on the petition.
 - Lead Agency may or may not require the Vendor to include supporting documentation as part of clarification.
- Vendors and Lead Agencies can go back-and-forth between 'Clarification Required' and 'Clarification Provided' as many times as necessary.
 - Note: Lead Agency can also choose at any time to 'force' a recoupment or accept the petition.
- Actions completed by either side during the negotiation results in a deadline being set for the other side to respond.

Icon Definitions

<u>Icon</u>	<u>Definition</u>
	Record has been flagged for Recoupment by the Lead Agency
	Clarification of Petition has been provided to the Lead Agency by the Vendor
	Clarification of Petition Requested by the Lead Agency
	Recoupment has been Confirmed by the Vendor
	Recoupment has been Released by the Lead Agency

Client Tracking – Check-In Required

bhsdstar Quality (QA)

From the Home screen, Click "QA Review" tab.

QA REVIEW

PROGRAMS CLIENT-

Logged in as: Spencer Williams

Test Provider

Overview

CareLink

Claims

Forensics

Opioid STR

Prevention

SAPT BG – Womens

SGF: Substance Abuse

Treat First

Overview Tracking

Corrections Required

Pending Invoices

Invoice History

RUN REPORTS FOR Overview

Client Tracking

Active Clients

Deactivated Clients

Check-In Required

Indicates you are on the Home screen.

The screenshot displays the bhsdstar Quality (QA) web application interface. The top navigation bar includes the logo, a user profile section showing 'Logged in as: Spencer Williams', and tabs for 'PROGRAMS' and 'CLIENT-'. A red arrow points to the 'QA REVIEW' tab, which is highlighted with a red box. A text box above this arrow states: 'From the Home screen, Click "QA Review" tab.' The left sidebar contains a list of menu items: 'Test Provider', 'Overview', 'CareLink', 'Claims', 'Forensics', 'Opioid STR', 'Prevention', 'SAPT BG – Womens', 'SGF: Substance Abuse', and 'Treat First'. The 'Overview' item is highlighted with a red box, and a red arrow points to it from a text box that says: 'Indicates you are on the Home screen.' The main content area is divided into two sections: 'Overview Tracking' and 'Client Tracking'. The 'Overview Tracking' section contains four cards: 'Corrections Required' (with a 'Take Action' button), 'Pending Invoices' (with a 'View' button), 'Invoice History' (with a 'View' button), and 'RUN REPORTS FOR Overview' (with a 'Run Report' button). The 'Client Tracking' section contains three cards: 'Active Clients' (with a 'View' button), 'Deactivated Clients' (with a 'View' button), and 'Check-In Required' (with a 'View' button). Each card features an icon and a count in an orange circle.

QA Review - Dashboard

bhsdstar Quality (QA)

Provider: Test Provider Location: -- Any -- Status: -- Any -- Search: Search Read: -- Any -- Group by: Reason

Client was not active at the time of service

Transaction #	Claim ID	Client ID	Code	Service Type	Amount	Status	Deadline	Read
103	123123997	C001000000055444	90832	Psychotherpay 30 Min with Patient and/or Member	\$68.63	P	03/26	
238	123000936	C001000000057483	90832	Psychotherpay 30 Min with Patient and/or Member	\$68.63	P	03/26	
117	123777	C001000000055444	90832	Psychotherpay 30 Min with Patient and/or Member	\$68.63	P	03/27	
131	19531999	C001000000057400	90832	Psychotherpay 30 Min with Patient and/or Member	\$68.63	P		
1286	123000446	C001000000057417	0144	Inpatient Room & Board	\$4,500.00	A		
1283	123000448	C001000000057417	0144	Inpatient Room & Board	\$4,500.00	A	03/27	
445	999000001	C001000000057411	90847	Family Psychotherapy	\$121.50			
260	123000919	C001000000057471	90847	Family Psychotherapy	\$121.50			
289	123000899	C001000000057550	90847	Family Psychotherapy with Patient	\$121.50			
298	123000893	C001000000057550	90847	Family Psychotherapy with Patient				
337	123000855	C001000000057565	H0031	Enhanced Assessment				
345	123000847	C001000000057405	90847	Family Psychotherapy with Patient				
350	123000842	C001000000057451	90847	Family Psychotherapy with Patient				

QA REVIEW PROGRAMS CLIENT-

Logged in as: Spencer Williams

Various functions to search and sort the listed records below.

Indicates tab you are viewing

Icons are displayed in this column to indicate the status of each record listed.

Title bar indicates information displayed for records listed.

Records read are NOT highlighted and have this symbol

Records unread are highlighted and have this symbol

Click the arrow icon of each section to view or hide the section information as needed.

Record History

- Records flagged for QA review are ordered inside groups with nearest auto-recoupment deadline on top.
- Click a record to see details in the Record Status, Record Details, and Record History sections.

QA Review – Sort and Search Bar

Provider: Test Provider Location: -- Any --

Search by name [Q]

Test Provider Flagged: 1872
Clarification Required: 0

-- Any -- Flagged: 1872
Clarification Required: 0

When Provider box is selected, Provider Name will display along with the number of records in each “Flagged” and “Clarification Required” category.

Providers with multiple locations, can select a specific location to view. Each location will display the “Flagged” and “Clarification Required” information.

Provider: Test Provider Location: -- Any -- Status: -- Any -- Search: Search [Q] Read: -- Any -- Group by: Reason

-- Any --
Flagged
Petitioned
Clarification Required
Clarification Provided
Confirmed

-- Any --
Unread
Read

-- No Grouping --
Reason
Client ID
Claim ID
Procedure Code

Sort & Search bar displays various selection available by clicking in the category boxes

QA Review - Dashboard

bhsdstar Quality (QA)

Provider: Location:

Client was not active at the time of service

By default, records are grouped by "Reason" and can be grouped by other categories as needed.

Group by:

Icon indicates current status of record.

Click arrow icons to expand or hide section(s) as needed.

PROGRAMS CLIENT- Logged in as: Spencer Williams

Record Status

Current Status: Clarification to petition provided
Action Required By: Lead Agency Reviewer
Action Deadline: 03-26-2018 (5 days remaining)
After Deadline: Petition will be auto-accepted

Record status details displayed in this section.

Record Details

Provider Location: Test Provider Site
Program: Claims
Transaction #: 103
Service Date(s): 07-07-2017
Service Units: 1
Service Modifier(s):
Rendering Provider: Test
Client ID: C001000000055444
Client Name: Jason Dean
Client SSN: 9813
Client DOB: 10-24-1989
Client Diagnosis: F1010 / F0632
Claim ID (ClaimMD): 123123997
Claim ID (Vendor):
Invoice ID:
Payment ID:
Paid Amount: \$68.63
Submitted By: Claim MD

Details of record highlighted to the left will be displayed in this section.

Record History

03-19-2018: Clarification Provided | Spencer Williams I need dis.
03-19-2018: Clarification Requested | Spencer Williams Here is some clarification.
03-19-2018: Recoupment Petitioned | Spencer Williams I need dis.
03-19-2018: Vendor Notified | Spencer Williams Contacted Spencer on 03/01/2018.
03-19-2018: Identified for Recoupment | Anthony Spencer Client was not active at the time of service

History details of the highlighted record will be displayed in this section.

Transaction #	Claim ID	Client ID	Code	Service Type	Amount	Status	Deadline	Read
103	123123997	C001000000055444	90832	Psychotherapy 30 Min with Patient and/or Family Member	\$68.63	P	03/26	
238	123000936	C001000000057483	90832	Psychotherapy 30 Min with Patient and/or Family Member	\$68.63	P	03/26	
117	123777	C001000000055444	90832	Psychotherapy 30 Min with Patient and/or Family Member	\$68.63	P	03/27	
131	19531999	C001000000057400	90832	Psychotherapy 30 Min with Patient and/or Family Member	\$68.63	P	03/27	
1286	123000446	C001000000057417	0144	Inpatient Room & Board - Psychiatric	\$4,500.00	A	03/27	
1283	123000448	C001000000057417	0144	Inpatient Room & Board - Psychiatric	\$4,500.00	A	03/27	
445	999000001	C001000000057405			\$121.50			
260	123000919	C001000000057405			\$121.50			
289	123000899	C001000000057405			\$121.50			
298	123000893	C001000000057405			\$121.50			
337	123000855	C001000000057565	H0031	Enhanced Assessment	\$130.00			
345	123000847	C001000000057405	90847	Family Psychotherapy with Patient	\$121.50			
350	123000842	C001000000057451	90847	Family Psychotherapy with Patient	\$121.50			
353	123000839	C001000000057451	H0031	Enhanced Assessment	\$146.25			
09134711326VND				Provider Invoice Upload	\$5,000.00			
27140211381CLN		C001000000057471		Group Psychotherapy	\$37.50			
471	123000754	C001000000057541	96118	Neruopsych Testing w/report, face-to-face and interpretation and report	\$112.50			
475	123000750	C001000000057539	96118	Neruopsych Testing w/report, face-to-face and interpretation and report	\$112.50			
480	123000746	C001000000057540	96118	Neruopsych Testing w/report, face-to-face and interpretation and report	\$112.50			
30142411391CLN		C001000000057556		Neruopsych Testing w/report, face-to-face and interpretation and report	\$112.50			
13105811406VND				Workbook Upload	\$1,000.00			
13101411411VND				Workbook Upload	\$30.00			
548	123000716	C001000000057541	96101	Psychological Testing by Psych. Or MD face-to-face and interpretation and report	\$90.00			
597	111187	C001000000057454	96102	Psychological Testing by Technician	\$45.00			
600	133448	C001000000057511	96102	Psychological Testing by Technician	\$45.00			
649	134328879	C001000000057511	H0018	Behavioral health; short-term residential (non-hospital residential treatment program), without room and board, per diem (Alcohol and/or drug services)	\$750.00			

Record currently selected will be highlighted in Orange.

Detailed information regarding the highlighted record will be displayed on the right-hand side of the screen.

- Record Status section for each Record will display the number of days remaining for your action to be completed before the record is either auto-recouped or auto-released.

QA Review - Dashboard

bhsdstar Quality (QA)

QA REVIEW PROGRAMS CLIENT-

Logged in as: Spencer Williams

Vendor: Test Provider Status: **Flagged** Search -- Any -- Reason

Indicates records displayed on this screen are sorted by "flagged" for recoupment.

"Grouped by" categories are listed at the beginning of each section on the right-hand side.

Action buttons are available at the end of each "Grouped by" category listed.

Action buttons may be inactive (displayed as lighter color) depending on the action allowed for that record.

"Grouped by" sections will display a total amount at the end of each category.

Hovering over an icon with your mouse will display information about the icon or Action buttons.

All records identified for recoupment will have this entry in the Record History.

Transaction #	Claim ID	Client ID	Code	Service Type	Amount	Status	Deadline	Read
1286	123000446	C001000000057417	0144	Inpatient Room & Board - Private Deluxe - Psychiatric	\$4,500.00	⚠		
1283	123000448	C001000000057417	0144	Inpatient Room & Board - Private Deluxe - Psychiatric	\$4,500.00	⚠		
Total: \$9,000.00								
Action Buttons								
<ul style="list-style-type: none">Select one or more records to enable action buttons.Only the actions that can be applied to all selected records will be enabled.								
Details								
Provider Location: Test Provider Site								
Program: Claims								
Transaction #: 238								
Service Date(s): 08-06-2017								
Service Units: 1								
Service Modifier(s):								
Rendering Provider: Test								
Client ID: C001000000057483								
Client Name: Squanch Dizzy								
Client SSN: 051-15-1151								
Client DOB: 05-05-1955								
Client Diagnosis: F0281 / F0632								
Claim ID (ClaimMD): 123000936								
Claim ID (Vendor):								
Invoice ID:								
Payment ID:								
Paid Amount: \$68.63								
Submitted By: Claim MD								
Record History								
03-19-2018: Clarification Provided Spencer Williams I need dis.								
03-19-2018: Clarification Requested Spencer Williams Here is some clarification.								
03-19-2018: Recoupment Petitioned Spencer Williams I need dis.								
03-19-2018: Vendor Notified Spencer Williams Contacted Spencer on 03/01/2018.								
03-19-2018: Identified for Recoupment Anthony Spencer Client was not active at the time of service								

To Accept Record(s) marked for Recoupment

Client was not active at the time of service ← **"Grouped by" category.**

Transaction #	Claim ID	Client ID	Code	Service Type	Amount	Status	Deadline	Read
1286	123000446	C001000000057417	0144	Inpatient Room & Board - Private Deluxe - Psychiatric	\$4,500.00	⚠	03/27	📧
					\$4,500.00	⚠	03/27	📧
Total:					\$9,000.00			

Export to CSV **Accept** ← **Click "Accept" to display a total list of record(s) selected for recoupment.**

Click in box to select Record(s) to take action on.

✓	Transaction #	Claim ID	Client ID	Code	Service Type	Amount	Status	Deadline	Read
✓	1286	123000446	C001000000057417	0144	Inpatient Room & Board - Private Deluxe - Psychiatric	\$4,500.00	⚠	03/27	📧
✓	1283	123000448	C001000000057417	0144	Inpatient Room & Board - Private Deluxe - Psychiatric	\$4,500.00	⚠	03/27	📧
Total:						\$9,000.00			

By accepting the selected recoupments you agree to repay the aggregate amount via future payment offsets, direct reimbursement, or a combination of both.

Services 2
Total : \$9,000.00

Click "Cancel" to stop and return to previous action **Cancel** **Submit** ← **Click "Submit" to confirm the acceptance**

- Status icon for the record(s) will change from the Orange triangle ⚠ to a handshake icon 🤝

To Petition Record(s) marked for Recoupment

Client was not active at the time of service

"Grouped by" category.

Transaction #	Claim ID	Client ID	Code	Service Type	Amount	Status	Deadline	Read
1286	123000446	C001000000057417	0144	Inpatient Room & Board - Private Deluxe - Psychiatric	\$4,500.00	⚠	03/27	📧
					\$4,500.00	⚠	03/27	📧
Total:					\$9,000.00			

Export to CSV Accept **Petition**

Click "Petition" to display a total list of record(s) selected for petition.

✓ Transaction # Claim ID Client ID Code Service Type Amount Status Deadline Read

✓ 1286	123000446	C001000000057417	0144	Inpatient Room & Board - Private Deluxe - Psychiatric	\$4,500.00	⚠	03/27	📧
✓ 1283	123000448	C001000000057417	0144	Inpatient Room & Board - Private Deluxe - Psychiatric	\$4,500.00	⚠	03/27	📧
Total:					\$9,000.00			

Please indicate why the selected services are valid and should not be recouped. Optionally you may include supporting documentation.

Why are the selected records are being petitioned?

Click here or Drag & drop file here to add attachments

Services 2
Total : \$9,000.00

Cancel **Submit**

Click "Submit" to confirm the petition

Click in text box to indicate why the selected records are being petitioned.

To add supporting documents, Click here or Drag & Drop file here.

Click "Cancel" to stop and return to previous action

- Status icon for the record(s) will change from the Orange triangle ⚠ to a Petition icon P

To Submit Clarification on Record(s) marked for Recoupment

Client was not active at the time of service ← "Grouped by" category.

Transaction #	Claim ID	Client ID	Code	Service Type	Amount	Status	Deadline	Read
1286	123000446	C001000000057417	0144	Inpatient Room & Board - Private Deluxe - Psychiatric	\$4,500.00	⚠	03/27	✉
					\$4,500.00	⚠	03/27	✉
Total:					\$9,000.00			

Export to CSV Accept Petition **Submit Clarification** ← Click "Submit Clarification" to display a list of record(s) selected for this action.

✓ Transaction # Claim ID Client ID Code Service Type Amount Status Deadline Read

✓ 105	123123998	C001000000055444	90832	Psychotherpay 30 Min with Patient and/or Family Member	\$68.63	?	03/27	✉
288	123000900	C001000000057471	90847	Family Psychotherapy with Patient	\$121.50	?	03/27	✉
325	123000864	C001000000057451	90847	Family Psychotherapy with Patient	\$121.50	?	03/27	✉
213	123000952	C001000000057542	90847	Family Psychotherapy with Patient	\$121.50	?	03/27	✉
232	123000939	C001000000057483	90847	Family Psychotherapy with Patient	\$121.50	?	03/27	✉
259	123000920	C001000000057555	90847	Family Psychotherapy with Patient	\$121.50	?	03/27	✉
313	123000876	C001000000057451	90847	Family Psychotherapy with Patient	\$121.50	?	03/27	✉
169	123000984	C001000000057542	90847	Family Psychotherapy with Patient	\$121.50	?	03/27	✉
222	123000946	C001000000057542	90847	Family Psychotherapy with Patient	\$121.50	?	03/27	✉
Total:					\$1,040.63			

Please indicate why the selected services are valid and should not be recouped. Optionally you may include supporting documentation.

Detailed response to clarificaiton request.

Click here or Drag & drop file here to add attachments

Services: 1
Total: \$68.63

Cancel **Submit** ← Click "Submit" to confirm the petition

Click in text box to indicate why the selected records are being petitioned.

Click "Cancel" to stop and return to previous action

To add supporting documents, Click here or Drag & Drop file here.

- Status icon for the record(s) will change from the Question mark icon ? to a Petition icon P

To Export Record(s) marked for Recoupment to Excel

Client was not active at the time of service ← "Grouped by" category.

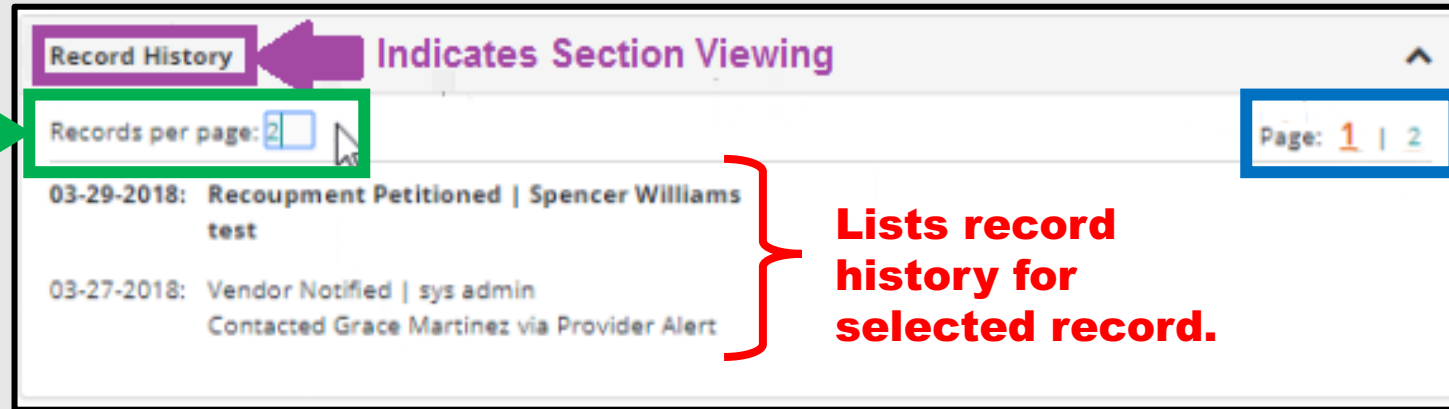
Transaction #	Claim ID	Client ID	Code	Service Type	Amount	Status	Deadline	Read
1286	123000446	C001000000057417	0144	Inpatient Room & Board - Private Deluxe - Psychiatric	\$4,500.00	⚠	03/27	📧
					\$4,500.00	⚠	03/27	📧
Total:					\$9,000.00			

Export to CSV ← Click "Export to CSV" to export Record(s) marked for Recoupment to Excel.

- Click the Record(s) in the Checkmark column to highlight.
- You can select ALL records in a group, by clicking on the check mark in the group header (circled in green).
- Click Export to CSV.
- An excel csv file will be displayed.

Additional QA Review User Information

Click here to select the number of "Records Per Page" displayed



The screenshot shows a 'Record History' section. A green box highlights the 'Records per page: 2' dropdown menu, with a green arrow pointing to it from the left. A purple box highlights the 'Record History' header, with a purple arrow pointing to it from the left and the text 'Indicates Section Viewing'. A blue box highlights the 'Page: 1 | 2' pagination controls, with a blue arrow pointing to it from the right. A red bracket groups two record entries, with a red arrow pointing to it from the right and the text 'Lists record history for selected record.'.

Record History

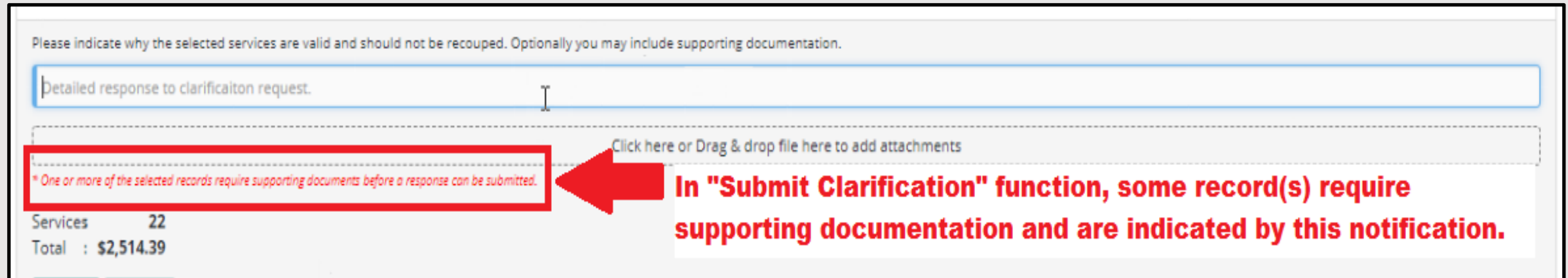
Records per page: 2

03-29-2018: Recoupment Petitioned | Spencer Williams test

03-27-2018: Vendor Notified | sys admin
Contacted Grace Martinez via Provider Alert

Number of available pages displayed here.
Click on page number to view selected page.

- **Note:** You can change the number of **Records Per Page** displayed based on your preference. Depending on the number of entries in the **Record History**, the **Number of Pages** will increase or decrease accordingly.



The screenshot shows the 'Submit Clarification' function. A red box highlights a notification message: '* One or more of the selected records require supporting documents before a response can be submitted.' A red arrow points to it from the right. Below the notification is a text area for 'Detailed response to clarification request.' and a dashed box for attachments with the text 'Click here or Drag & drop file here to add attachments'. At the bottom, there is a summary table.

Please indicate why the selected services are valid and should not be recouped. Optionally you may include supporting documentation.

Detailed response to clarification request.

* One or more of the selected records require supporting documents before a response can be submitted.

Click here or Drag & drop file here to add attachments

Services	22
Total	: \$2,514.39

In "Submit Clarification" function, some record(s) require supporting documentation and are indicated by this notification.

Additional QA Review User Information

Please indicate why the selected services are valid and should not be recouped. Optionally you may include supporting documentation.

Here are our documents on this matter |

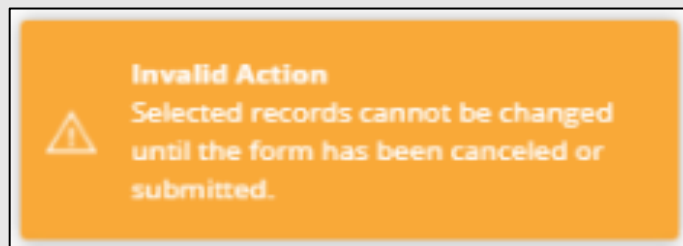
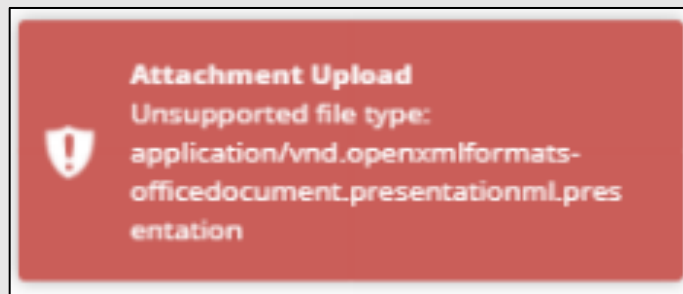
Supporting Documentation.docx

Supporting Document(s) attached successfully will be listed here.

Click the trash can icon to delete the attachment(s).

Click here or Drag & drop file here to add attachments

Note: An error message will appear if the supporting documentation is not in an approved format (i.e. PowerPoint).



Examples of the error messages you may encounter while using the QA Review function.

BHSDSTAR Contact Information

Website: www.bhsdstar.org

Email: support@bhsdstar.org

Phone Number: (505) 428-0838